

# CE Zoom

*Making Regulation Effortless*

*Sarah Thiel, RDH*  
*CEO CE Zoom*



505-716-1991

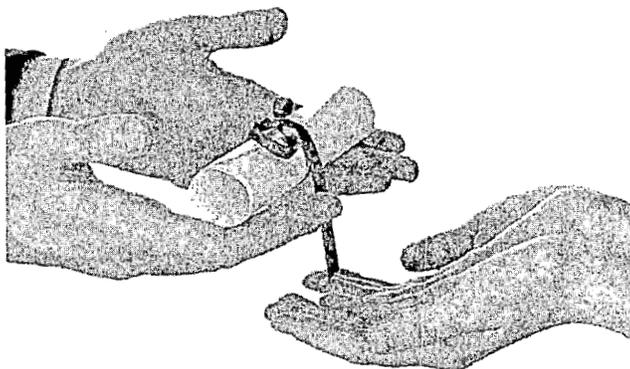


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# The Current Process: PAPER!

It is easy to cheat the system because there is no form of true regulation in place. What if professionals were required to show their compliance by submitting their transcripts to the state. CE Zoom allows the state to access, view, and/or audit all submitted transcripts without the headache of paper, multiple files, and scattered emails. All submitted transcripts will be saved on the states CE Zoom account for fast and easy access. I know... this is awesome right? It's so easy it almost sounds too good to be true... well it's not.



## The issue with CE

Every state is different

Compliance is difficult

Regulation is difficult

NO ONE REALLY KNOWS THEIR STATES RULES!!!

This is what a professional goes through to make sure they have enough of what's required and enough from certain categories, and this picture also depicts what it's like for the state board member to receive the paperwork and sort through it all. There are minimums / maximums, certain course categories that count, some that don't, and the list goes on. It really doesn't have to be so difficult!

## State Dashboard

Here's just an example of what your state page will look like. From the navigation menu bar you enter in a percentage of professionals you want to audit. (Example 4%, 8%, 10%...) and CE Zoom will automatically select individuals for you. You can view each and after review the auditor can will automatically know if the professional passed or failed.

First Name	Last Name	License	License #	Last Activity	Contact	View
Sarah	Thiel	Dental Hygiene	0112214	02/04/2016 05:25 PM	Contact	View
Joselyn	Sewell	Dental Hygiene	0312815	02/04/2016 06:25 PM	Contact	View

# Transcript Overview

Dental Hygiene > NM

A licensed professional won't be able to submit their transcript to the state if it is incomplete. This example is of my personal transcript overview showing I am only 97% compliant.

	Requirement	Completed	Applied	Needed
Total Credits Required	45.00	101.5	74.5	1
Max Home Study	30.00	15	15	0

Description	Value
Max Allowed With No Test	30.00 Credit Hours
Renewal Time Period	Every 3 Years
Maintain Records For	1 Year following renewal.
Submit evidence on request within	30 Days

Renewal Progress



This shows me needing 45 CE credit hours in a 3 year period to satisfy my state requirements. I have completed 101.5 CE, 74.5 credits are counting toward my state, but it is still showing I need 1 more CE credit hour before I am compliant and can submit my transcript to my state. As a professional, I could scroll down and find out which course I am missing and instantly know that I am still needing to satisfy my CPR requirement. (In this case I just needed to upload it.)

# State Specific Transcript

Group 2

Description	Value
Minimum Credit Hours Required	0.00 Hours (Elective)
Maximum Credit Hours Allowed	14.00 Hours
Mandatory LIVE	No
CE's Completed: 12 CE's Applied: 12 CE's Needed: N/A	
12 of a max of 14.00 Hours completed	

**Course Categories**  
Methodology / Methods of Health Care Delivery, Patient Relations, Communications, Management, Dental Hygiene Practice Management / Organization

**General Categories**  
Non-Clinical (Business) Enhancing the Business Aspect

**Courses taken and applied to this group**

Date	Course Title	Certificate	Pre-Audited	Completed	Applied
2016-01-08	Acclaim Approach to Patient Care	<a href="#">View</a>	△	2.00	2.00
2016-01-08	"Everyone's In Sales" Practice Management - Beyond the Drill	<a href="#">View</a>	✓	1.00	1.00
2016-01-10	LinkedIn Wrokshop	<a href="#">View</a>	✓	2.00	2.00
2016-04-08	"What you need to KNOW to get your patients to say "YES" 3 Fundamentals to a Successful Case Pre	<a href="#">View</a>	✓	2.00	2.00
2016-04-09	The 5 Keys To Social Media Marketing Success"	<a href="#">View</a>	✓	2.00	2.00
2016-04-09	TEAM Culture and Team Invisalign	<a href="#">View</a>	✓	2.00	2.00
<b>Total</b>				<b>12</b>	<b>12</b>

- Each state is developed exclusively according to their rules and regulations, breaking out all the requirements into groups for professionals to easily understand what is being required of them
- All submitted transcript will be displayed exactly the same for each licensed professional, increasing understanding of what is being presented and decreasing time needed to review CE's by the state.
- All CE certificates issued through CE Zoom are listed as pre-audited. This states that the professional did not manipulate the way the CE is allocated. (They can not change the course category, approved provider, number of CE's, this person did not get the code from a friend, etc) Only the state has the authority to deny the way it is allocated.
- Yellow Flagged CE certificates on the transcript page are to notify the state that these are manually uploaded CE's. Manually uploaded CE's can be manipulated and entered incorrectly.

Group 1

<b>Description</b>	Value
Minimum Credit Hours Required	31.00 Hours
Maximum Credit Hours Allowed	Unlimited
Mandatory Live	No
CE's Completed: 7 CE's Applied: 7 CE's Needed: 24	

**Course Categories**  
 Dental Charting / Terminology / Record Keeping, Radiology / Photography (Technique, Safety, Protection, Diagnosis, and Study of Radiographic Data), Dental Hygiene Courses / Services, Oral / Dental Health Care & Conditions (Hypersensitivity, Trauma, Halitosis, Nervousness, Orofacial Pain, Oral Complications to Medicine Use, etc.), Implantology & Care of Implants, Pain and Symptom Management, Medical Health Subjects / Oral Systemic Health Connections (Diabetes, Heart Disease, etc.) / Scientific Courses, New Concepts in Dental Hygiene, Medical Emergencies / Emergency Care, Cosmetic and Esthetic Dentistry (Treatment and Maintenance), Periodontics (Diagnosis, Treatment (surgical/non-surgical), Maintenance, Scaling / Instrumentation, Supportive Periodontics), Dental Public / Community Health, Issues, Care in Non-Traditional Settings, Sealants

**General Categories**  
 Supportive Clinical Dentistry, Subjects That Relate to the Support of Patient Care and Clinical Dentistry, Direct Clinical Dentistry, Subjects That Relate Directly to Patient Care and Clinical Dentistry

**Courses taken and applied to this group**

Date	Course Title	Certificate	Pre-Audited
2016-08-20	More Stats, Facts, Myths and Downright Lies!	View	✓
2016-08-20	Stats, Facts, Myths and Downright Lies!	View	✓
2016-08-20	Poster Sessions/Table Clinics	View	✓
		<b>Total</b>	3

# Tracks Minimum CE Requirements

Group 2

<b>Description</b>	Value
Minimum Credit Hours Required	0.00 Hours (Elective)
Maximum Credit Hours Allowed	14.00 Hours
Mandatory Live	No
CE's Completed: 15.5 CE's Applied: 14.00 CE's Needed: N/A CE Applied: 14.00 (Unlimited to max CE allowed) 14.00 of a max of 14.00 Hours completed	

**Course Categories**  
 Methodology / Methods of Health Care Delivery, Patient Relations, Communications, Management, Dental Hygiene Practice Management / Organization

**General Categories**  
 Non-Chemical (Business) Enhancing the Business Aspect

**Courses taken and applied to this group**

Date	Course Title	Certificate	Pre-Audited
2016-01-06	Emotional Intelligence	View	✓
2016-01-06	Everyone's In Sales! Practice Management - Beyond the DTS	View	✓
2016-01-06	An Effective Dental Practice	View	✓
2016-01-06	DAY 2 Networking Skills for the Successful Dental Professional! It's time to make networking WORK!	View	✓
2016-01-09	Fear of Writing	View	✓
2016-01-10	LinkedIn Workshop	View	✓
2016-01-10	When you are the Business	View	✓
2016-01-11	Monday: Setting the Stage for Successful Coaching	View	✓
2016-01-11	Business Etiquette & Sales Tips	View	✓
2016-04-08	What you need to RNDW to get your patients to say "YES" 3 Fundamentals to a Successful Case Pre	View	✓
2016-04-09	The 5 Steps To Social Media Marketing Success!	View	✓
2016-04-09	TEAM Culture and Team Division	View	✓
		<b>Total</b>	14.00

Limited by group max CE allowed

# Tracks Maximum CE Requirements

Group 1

<b>Description</b>	Value
Minimum Credit Hours Required	1.00 Hour
Maximum Credit Hours Allowed	Unlimited
Mandatory Live	Yes
CE's Completed: 0 CE's Applied: 0 CE's Needed: 1	

This group has required providers. (View approved providers)

- (AHA) American Heart Association
- (ARC) American Red Cross
- (ASH) American Safety and Health Institute
- (NSC) National Safety Council
- EMS safety Services

# Tracks Approved Providers

Courses Taken Not Matching Requirements

Courses in this group did not match the State Requirements and no CE was allocated.

Courses

- CPR for the Health Care Provider on 2016-09-06, Credit Hours: 4.00
  - No match on state required provider

Group 7

**Description**  
 Required but does not count toward CE Total  
 Mandatory Live

Value  
 Yes

CE's Completed: 1 CE's Applied: 0 CE's Needed: N/A  
 Courses Required: 1, Courses Taken: 1  
 This group has required providers. (View approved providers)

# Tracks Required but not Counted

100.0% Complete

**Course Categories**  
 CPR, CPR/AED for Professional Rescuer & Health Care Provider, BLS/HCP Health Care Provider, ACLS, PALS, BLS

**Courses taken and applied to this group**

Date	Course Title	Certificate	Pre-Audited	Completed	Applied
2016-09-05	CPR for the Health Care Provider	<a href="#">View</a>	<input type="checkbox"/>	4.00	0.00
<b>Total</b>				<b>4</b>	<b>0</b>

CE's in this group are required but not counted

Group 1

**Description**  
 Minimum Credit Hours Required  
 Maximum Credit Hours Allowed  
 Mandatory Live

Value  
 1.00 Hour  
 Unlimited  
 Yes

CE's Completed: 0 CE's Applied: 0 CE's Needed: 1  
 This group has required providers. (View approved providers)

# Tracks Educational Methods

**Course Categories**  
 BLS/HCP Health Care Provider, ACLS, PALS, BLS, CPR, CPR/AED for Professional Rescuer & Health Care Provider

**Courses Taken Not Matching Requirements**

Courses in this group did not match the State Requirements and no CE was allocated.

- Courses**
- Online CPR for the Health Care Provider on 2016-09-05, Credit Hours: 3.00
    - No course category or course type match

Requirement	Completed	Applied	Needed
Total Credits Required	112	121.5	3
Max Home Study	27	24.00	

**Description**  
 Renewal Time Period  
 Maintain Records For  
 Submit evidence on request within

Value  
 Every 3 Years  
 6 Years following renewal.  
 60 Days

CE Applied: 24 (Limited by state requirements max home study allowed)

Group 5

Description	Value
Minimum Credit Hours Required	3.00 Hours every 2.00 Years
Maximum Credit Hours Allowed	Unlimited
Mandatory Live	Yes
CE's Completed: 4 CE's Applied: 0 CE's Needed: 3 CE Applied: 0 (This CE has expired, needs to be renewed every 2.00 Years)	

# Tracks Requirements that need to stay Current

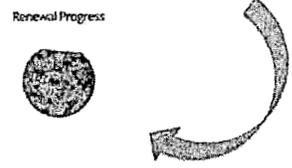
Course Categories  
CPR/AED for Professional Rescuer & Health Care Provider, BLS/NCP Health Care Provider, ACLS, PALS

Courses taken and applied to this group

Date	Course Title	Certificate	Pre-Audited	Applied
2016-01-15	Podium Power 101		<input checked="" type="checkbox"/>	4.00
		Total		4.00

This CE has expired, it needs to be renewed every 2.00 Years to be valid

	Requirement	Completed	Applied	Needed
Total Credits Required	54.00	11.00	23.00	20.00
Max Home Study	24.00	11.00	23.00	20.00



Description	Value
Renewal Time Period	Every 3 Years
Maintain Records For	6 Years following renewal
Submit evidence on request within	60 Days

Group 7 Exclusion group >

Course Categories in this group will not count to your State Requirements

CE's Completed: 2 CE's Applied: 0 CE's Needed: N/A

General Categories  
Non-Clinical (Personal) Relates to Personal or Professional Gain, Not dental related

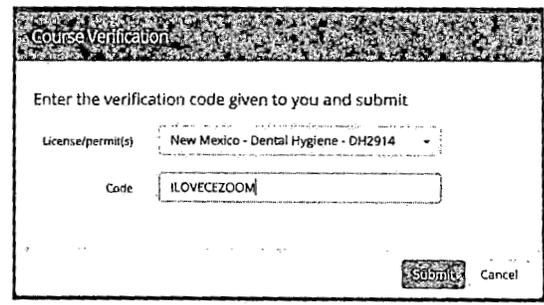
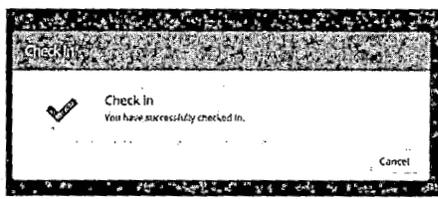
Courses taken and applied to this group

Date	Course Title	Certificate	Pre-Audited
2016-01-09	Podium Power 101		<input checked="" type="checkbox"/>
2016-01-10	Tips and Tricks		<input checked="" type="checkbox"/>
2016-01-11	The Entrepreneurial Spirit		<input checked="" type="checkbox"/>
		Total	

# Exclusion Group

## Check In / Verification

Showing the "Check-in" Feature and "Course Verification" to prove a licensed professional did attend the course they are receiving credit from and allowing our certificates to be pre audited.



## Additional Features

If you have any other requirements that are not listed, please ask. If we don't already offer them, we can customize them for you. Thank You

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# CE Zoom

## *Making Course and Conference Management Effortless*

### **Associations / Conferences / Companies**

Need help managing your CE courses / conferences or would you like to know what an impact your clinical trainers are making? CE Zoom offers conferences, companies, or anyone managing a CE course and/or conference a fully automated CE management platform that is streamlined to run its self! CE Zoom takes the hassle out of the stresses of collecting money, making sure those who actually paid are the one's receiving credit, mandating a survey, distributing CE Certificates, and maintaining documentation. CE Zoom also assists companies with making sure the clinical trainers are effective with training/selling products.

Request a Demo: [sarah@cezoom.com](mailto:sarah@cezoom.com)

# Our Features

## Advertise Courses / Conferences

Advertise your courses / conferences on a national level to your direct audience.

## Online Registration

Save time managing payments, increase attendance, and reduce cost.

## Easy Check-In

Confirm course attendance by having your attendees check in.

## Issue Surveys

Never miss valuable feedback again with our 100% completion rate.

## Distribute CE Certificates

Automatically distribute CE certificates.

## Maintain Documentation

Valuable event documentation stored on one easy to access platform.

## Find a Speaker

Connecting event planners with Professional Speakers.

## Course Approval

Not backed by a certifying agency? Have it accredited by one of our CERP/AGD certifying providers.

## On-line Registration

Increase your attendance, simply registration for your attendees, and streamline your event management (checkin, surveys, and verification) for both you and your attendees.

## Surveys

All surveys will be issued automatically to all attendees that verify to receive credit for the course. Surveys can be made optional or required. Say good bye to wasted paper and uncompleted surveys and see how valuable your attendees feedback really is. Add in a call to action at the end of your survey to direct your attendees to your website.

## CE Certificates

All certificates will be automatically distributed directly to your attendees account to be tracked and stored against their states rules never to be lost again. (No reporting attendees CE activity to CE Zoom)

## Attendee Rosters

No more paper rosters. Roster info includes attendees names, address, phone #, e-mail, registration, checked in, and verification status, and active membership info.

## Documentation

Maintain a list of all courses you have offered including documentation of course objectives, event location, CE hours offered, sponsors, presenters, and survey results.