

## Participants ready for certification

This document shared the steps you'll want to take when a participant lets you know they're ready for certification.

JP communicates with folks who express interest in a certification visit. Normally (read: non-pandemic times) he connects them right away to a volunteer so they can start scheduling the visit. Because we don't want volunteers to have to do an extensive amount of communicating around safety procedures, JP has been playing that role by sending these participants an email that includes the following request and link to agree to safety guidelines:

*The current pandemic has compelled us to be extra careful when visiting people's yards. To ensure that both you and our team are protected, we have developed guidelines that we are asking you to follow. Please fill out this form to indicate that you have read and agree with those guidelines.*

[Guidelines Form](#)

If you're making follow up calls, or in other ways learn that someone is ready for certification, please take the following steps:

1. Send them the attached template email that includes this language and asks them to fill out the form.
2. Update the fields in Presspoint the way you normally would when you're assigning them to a certification visit.
  - a. Change **Site Status** to Certification/Renewal Pending.
  - b. Change the **Assignment Date** field to the day you spoke with the participant.
  - c. Change the **Next Task** to Certification Visit (for In Progress properties) or Upgrade Visit (for Certified or Inactive properties).
  - d. The **Task Date** field should be blank.
  - e. Select JP Marchetti-Mendez for the **Next Task Assigned**.
  - f. Click the **Save** button.

1321 NE Liberty St  
Property  
f309fb2ced76fd157624857632@noreply.invalid  
#17165 Since December 13, 2019 [View](#)

Profile History

[SAVE](#)

**Address Organization**  
The company or organization at this address.

**Address Line One**  
Typically, this is a street address  
1321 NE Liberty St

**Unit, Suite, or Apartment**  
Typically, this is a unit, suite or apartment

**City**  
Portland

**State**  
Oregon

**Country**

**Site Status**  
Certification/Upgrade Pending

**Application Date**  
2019-03-17

Application fee paid?

**The size of my yard is 1 acre or smaller**  
 My Property is SMALLER THAN 1 ACRE.  
We utilize mapping systems, such as Portland Maps, to verify lot size.  
 My Property is LARGER THAN 1 ACRE  
Please do not pay. Lots larger than 1 acre are not eligible for the program. Please check out the free resources available on our website and contact your local soil and water conservation district to learn about alternative options for creating a Backyard Habitat.

**Property Type**  
Single-Family Residential

**Widgetized Relationships**

**Individuals**  
[Zach Brehm](#)  
[Kate Brehm](#) (primary contact)

**Assignment Date**  
2020-09-11

**Next Task**  
Certification Visit

**Task Date**

**Next Task Assigned**  
JP Marchetti-Mendez

This will help us schedule the visit much faster because JP will be notified when the participant fills out the form. Otherwise they'll be waiting a while until JP runs a report.