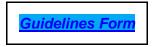
Participants ready for certification

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

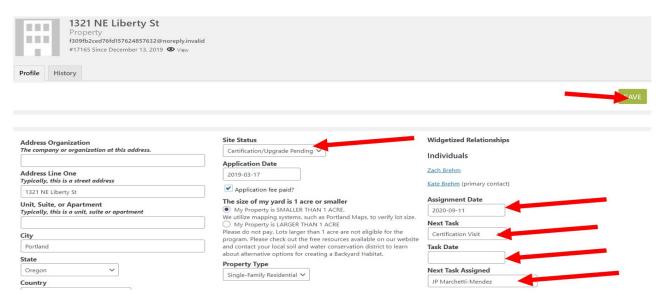
JP communicates with folks who express interest in a certification visit. Normally (read: non-pandemic times) he connects them right away to a volunteer so they can start scheduling the visit. Because we don't want volunteers to have to do an extensive amount of communicating around safety procedures, 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.



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.
 - 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.



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.