



****REVISED**** August 2021

PROGRAM COORDINATOR CHECKLIST

If you have any questions please call the Coordinator Department at 1-800-647-8079 ext. 2.

If you get voicemail for the Coordinator Department and need an answer, call Customer Service at 1-800-844-8260.

For weather related seminar updates call 1-800-844-8260 option 3.

- Prior to the seminar, please take the time to watch the 10-minute training video: <https://youtu.be/dgO3Ub27NKY>
BEFORE THE DAY OF THE PROGRAM, ACCESS THE PESI COORDINATOR PORTAL AT extranet.pesi.com.
This is where you will access the "Coordinator Sign-In App" the day of the event, to check-in attendees.
- ARRIVE ON SITE** 1 hour prior to the start time. (Example: 8:00AM start, be on site by 7:00AM).
- LOCATE MEETING ROOM** You can ask the Front Desk to direct you. Please check reader boards/signage to see if this meeting is properly posted as the title of the program and not as PESI. The registration table could be located outside the meeting room. If it is not, call us for additional instructions.

****Please follow the facility's COVID-19 protocols for our seminar today.**

- NO LATER THAN 7:15AM**, call the Coordinator Line at 1-800-647-8079 x2 for additional information.
- REVIEW TOTAL REGISTRATION COUNT** and check that there are a few extra chairs to allow for any Walk-In Registrants. If not, call the Coordinator Line at 1-800-647-8079 x2.
- REGULAR COFFEE & HOT WATER FOR TEA** have been ordered and should arrive ½ hour prior to seminar start time. **Call PESI before ordering anything else. DO NOT** sign any banquet tickets. Have the facility call their PESI contact person.
- REGISTRATION CHECK-IN**—as attendees arrive, mark attendees as present on the AM tab of the Coordinator Sign-In App.
- WALK-IN ATTENDEES or anyone not on the list**—
 1. They must call Customer Service 1-800-844-8260 to get registered before being checked in and entering the program.
 2. **After the individual has called Customer Service, refresh the Coordinator App and their name should now show as an attendee. Proceed with marking them as present.**
- SUBSTITUTION**— please follow the walk-in process detailed above. PESI needs to update the attendee's registration information so their name will be on the CE Certificate and not the person they are substituting for.
- OPENING ANNOUNCEMENTS/INTRODUCTION OF SPEAKER**—prior to the start of the seminar, ask the speaker how they prefer to be introduced and the approximate morning and afternoon break times.

*****Due to continuing education board requirements, if there are any deviations in the scheduled start or ending time please contact PESI as soon as possible, at 1-800-647-8079 extension 2.**

- WHEN THE SEMINAR IS ABOUT TO BEGIN** Go into the meeting room and make the Announcements. Navigate to the bottom of the AM tab to document the start time of the event. Click the blue "Send to PESI" button. This will submit the sign-in sheet to PESI.

ANNOUNCEMENT SCRIPT:

Good Morning! Welcome to today's (seminar title) seminar by PESI. You will find the restrooms (describe where), emergency exits (tell where). Approximate break times will be ___:___ AM and ___:___ PM. Lunch is on your own and will be from ___:___ AM - ___:___ PM. Restaurants close by are (list a few if you know of any).

PESI has developed an online system for you to conveniently receive your CE Certificate electronically. At the conclusion of the seminar, your Evaluation and CE Certificate will be available in your PESI account. Once you have completed the CE Quiz and evaluation you will have access to your CE Certificate. Information on how to obtain your Certificate is also printed in the back of your seminar manual.

As a courtesy to the speaker and others, please silence your cell phone and refrain from using them in the meeting room. Recording the lecture is not permitted. I would now like to welcome (Speaker).

- LATE ARRIVALS** if an attendee arrives after the start of the event, navigate to the AM tab and click the red "X" adjacent to the late attendee. In the Arrival time field, select the time they arrived. Then click the green save button to the right.
- MORNING BREAK**—Navigate to the Breaks tab to record the start and end time of the morning break. Click the green "Save Break Times" button.
- LUNCH BREAK**—Navigate to the Breaks tab to record the start and end time of the lunch break. Click the green "Save Break Times" button.
- AFTER LUNCH**, welcome registrants back and check them in from the PM tab. When the speaker is about to begin, navigate to the bottom of the PM tab to document the start time of the afternoon session.
- AFTERNOON BREAK**— Navigate to the Breaks tab to record the start and end time of the afternoon break. Click the green "Save Break Times" button.
- EARLY DEPARTURE** – If any participants departed early click on the "ok" tab and you can update their status by toggling to the red, "Early" departure flag. Then document the departure time in the "Time Left" field and click the green "Save" button.
- END OF DAY** – Navigate to the End tab and document the "Actual End Time". Click the "Submit/End Event" tab.
- If any corrections need to be made after you have clicked on the final Submit, call the Coordinator Department at 1-800-647-8079 X 2.**

THANK YOU FOR COORDINATING OUR PESI SEMINAR. WE HOPE YOU ENJOYED YOUR DAY!