**Add Check-in docs to the Check-in Session Workflow**

**NOTE***: It is recommended to add the sessions as you go where the CPD team will be doing random check between July and August to confirm the check-in*

**NOTE***: Templates for session list, Announcement, disclosure summary and evaluation summary will be added to the session*

The Final Check-in session will be the last session in the series. This is a new session for holding all the documents (except the disclosures) required for the check-ins. The process for check-ins will be changing to once a year (in June/July timeframe) starting in July 2022. The CPD team will be doing random checks between July 2021 and December 2021 to confirm the check in information being updated is correct. We recommend uploading the information for each session as you go, and we will reach out if there are any issues or if the documents need updating.

**The Check-in session will be used to store the**

1. Latest session list,
2. Announcement
   1. For all session or
   2. A note should be added stating announcements are sent to Partners CPD [PartnersCPD@PARTNERS.ORG](mailto:PartnersCPD@PARTNERS.ORG)
3. Disclosure summaries for all sessions
4. Evaluation Summary

**Adding documents to the Check-in Session:**

1. Open the Check-in Session (this will be the last session in the series)
2. Click the Custom Tab
3. Please update the session list to the latest version of the sessions for your series
   1. Reminder to remove the sessions when a session state is unpublished
4. Announcements
   1. If the CPD team is included on your mailing list please add this to the announcement area
   2. If the CPD team is not included on your mailing list please add the announcement for each of your session
5. Disclosure Summary
   1. Upload the disclosure summary for each session
6. Evaluation Summary
   1. This section will be used when the series is completed.
   2. Please review the Evaluation Workflow for instruction on how to create the evaluations.
7. After each upload please save the session and keep the state as new.
8. Once the series is completed and all Check-in documents have been uploaded – please change the state to ready for review. An email will be sent to the CPD team and we will review the documents and approve the session or provide feedback if needed.