**Workflow for the Monthly/Quarterly Evaluations**

**NOTE***: Please note this process is not used if the evaluation is after every session*

**NOTE**: If the series does not have an evaluation for every session – it is recommended to add a note on the disclosure summary that an evaluation is required for the session.

The CPD team will build the sessions for the monthly/quarterly evaluations if the requested for the series. The sessions will be labeled with the format <date series name – Quarterly Evaluation>.

If the session list is not provided the evaluation will be create for the last day of the quarter (September 30, 2020, December 31, 2020, March 31, 2022, and June 30, 2022) and the session should be updated to be the last session in the quarter.

Every session that contains an evaluation will contain “This session includes a required evaluation” at the top of the session landing page. This includes series with an evaluation in every session.

When the session with an evaluation is canceled the session needs to be updated to a different date (see workflow below).

**How to update the Quarterly Evaluation to a new date**

1. Open the evaluation session you want to change the date for and click edit
2. In the Title & Description section: Change the date in the title to the new date.
3. In the Time and Place section: Change the dates (both) to the new date
4. Click Save

**For the replaced session:**

1. Click edit
2. Click publishing
3. Click publishing options
4. Uncheck published
5. In the Title & description tab: add cancelled to the beginning of the title
6. Click save

**View Cancelled/Unpublished Sessions:**

1. To see all session that have been cancelled – on the series home page – click sessions
2. In the tab unpublish there will be a list of all session that are unpublished and cancelled.