



Consultant On-site Engagement Checklist

Equipment Orientation and Applications Training

Pre-Consulting

- ☐ **Confirm Engagement Dates:** Jen will confirm engagement dates with you. Please mark your calendars for the engagement.
- ☐ **Book Travel:** Once an itinerary has been approved by the site, Jackie will provide details for you to book travel. Confirmations should be uploaded to your provided folder.
- ☐ **Vendor Credentialing (if applicable):** Review and complete all credentialing requirements, as soon as possible.
- ☐ **Review Marching Orders:** Review all details from marching orders, including additional site information prior to sending welcome email.
- ☐ **Send Welcome Email:** Send templated welcome email to site contact(s). CC Jackie and/or Jen. *(3-7 days prior to arrival)*
- ☐ **Items to Bring:** Detailed information will be included in Marching Orders, but plan to always bring Lab Coat and ME Photo ID.

During Consulting

- ☐ **Site Arrival:** Arrive 10-15 minutes early to connect with site contact (per marching orders).
- ☐ **Attendance Tracking:** Complete the attendance documentation form provided in your on-site engagement folder. Participants' attendance should be properly documented, and you must sign off on the complete form. *(Attendance sheet should be sent to Jackie the same day)*
- ☐ **On-site Debrief:** Complete an on-site debrief with site leadership as applicable using the provided debrief checklist.
- ☐ **Marketing Materials:** Provide appropriate marketing materials to site leadership or techs as applicable.

Post-Consulting

- ☐ **Debrief Email to ME:** At the conclusion of your on-site engagement, send a quick email or text to Jackie and/or Jen with any applicable information that may be needed. Include information about books left on-site, possible follow-ups, or any other applicable information. *(Within 1 day of training)*
- ☐ **Expenses:** Complete expense form to request reimbursement. Upload all receipts to your provided folder. *(Within 1 week)*
- ☐ **Follow-up Email to Site Contact(s):** Send a follow-up email directly to the site contact to check in and provide additional support. CC Jackie. Templates can be provided if needed *(Within 2 weeks)*