

Teaching and Training Session Checklist

By Checklister

- ☐ **Confirm session details**
 - ☐ **Identify the session**
Record the course/session reference or short title used in the approved invitation.
 - ☐ **Confirm the start time**
Check the actual participant-facing invitation and record its date and time. Resolve a time-zone mismatch before continuing.
 - ☐ **Confirm the session time zone**
Copy the time zone shown to participants and resolve conflicts with the invitation.
 - ☐ **Confirm the facilitator**
Record the staff role or authorized facilitator who has accepted delivery responsibility.
 - ☐ **Identify the delivery location or platform**
Record the room reference or platform name, such as the training room, Zoom or Microsoft Teams. Use an ordinary session reference rather than a secret-bearing join link.
 - ☐ **Check the expected participant count**
Use the current approved booking or roster total for room and materials planning. Enter a nonnegative whole number; keep names in the roster system.
 - ☐ **Confirm the planned session length**
Record the agreed session duration in minutes for room, agenda and break planning.
 - ☐ **Check the session plan**
Confirm the agenda, learning objectives and planned activities are the approved version for the audience. Reference that version in Comments.
- ☐ **Check the actual materials**
Starter examples: rename, remove or duplicate before use. Keep permitted references rather than copies of participant records.
 - ☐ **Open the approved slide deck [starter example]**
Replace with the actual presentation title. Open the file that will be delivered and check its revision against the approved plan. Record its permitted file/version reference. Remove this example if no deck is used.
 - ☐ **Open the participant handout [starter example]**
Replace with the actual handout. Confirm its revision, readable layout and enough copies or intended distribution route. Remove if no handout is used.
 - ☐ **Open the activity worksheet [starter example]**
Replace with the actual worksheet or exercise brief. Verify the instructions and facilitator answer guide agree with the approved activity. Remove if unused.
 - ☐ **Confirm practical access arrangements**
Ask the responsible support owner whether agreed arrangements are ready. Record readiness without private reasons or diagnoses.
 - ☐ **Test participant access to the handout [starter example]**
Use permitted participant access to open the named handout or download route. Staff-only access is not a pass. Adapt/duplicate this check for every separately shared file.
 - ☐ **Test participant access to the activity file [starter example]**
Use permitted participant access to open the named worksheet or exercise resource, then perform its first required action. Remove if unused and duplicate for other separately shared resources.
- ☐ **Rehearse the participant experience**
Adapt these starter tests to the actual in-person, online or hybrid session.
 - ☐ **Test the online joining route [starter example]**
If online or hybrid, follow the actual invitation route with permitted participant-level access. Confirm the participant reaches the intended session or approved waiting stage. Use Not applicable for in-person-only delivery.
 - ☐ **Check the in-person arrival route [starter example]**
If on site, verify that the invitation names the correct room and that the approved arrival instructions lead there. Use Not applicable for online-only delivery.

- ☐ **Test the microphone [starter example]**
Use the microphone required by the actual room/platform and confirm a permitted test participant can hear speech. Do not record participants for this test.
- ☐ **Test speaker or headset playback [starter example]**
Play approved test audio through the device required for the session. Check that the intended listener can hear it; use Not applicable when no playback is needed.
- ☐ **Test the presentation display or screen share [starter example]**
Open the real deck or resource on the room display or participant view. Confirm the intended content is readable and no unrelated content is shared.
- ☐ **Test the shared activity board [starter example]**
Replace with the collaboration tool actually used, such as a shared whiteboard or document. With participant-level permissions, make an authorized test contribution and confirm it appears. Remove if unused.
- ☐ **Test the quiz or poll [starter example]**
If used, open the planned quiz/poll as a permitted test participant, submit fabricated test content and confirm the facilitator receives the expected result. Remove if unused.
- ☐ **Resolve gaps and decide readiness**
 - ☐ **Prepare the fallback**
Record the approved fallback and where to find it, such as a printable handout or alternate exercise. State which objective it still covers and any limits. Confirm the facilitator can use it.
 - ☐ **Prepare attendance capture**
Check that the approved attendance tool is available to the authorized staff. Do not collect attendance names in this template.
 - ☐ **Prepare feedback capture**
Test the approved feedback route and collect only information the session needs.
 - ☐ **Retest corrected setup failures**
After each correction, repeat the affected participant-facing test and update its recorded result. Retain the original finding and retest time in Comments.
 - ☐ **Record the facilitator's readiness decision**
Resolve material blockers or agree an alternative with the organizer. Record decision-maker, time and any remaining owned action in Comments; brief affected participants through the approved route.
 - ☐ **Record the approved change or remaining blocker**
If not fully ready, record the accepted owner and next action or the organizer's approved alternative. Communicate changed joining arrangements through the usual route.