

Full Circle

From Classroom to Certification

The complete checklist toolkit for ServSafe Dual-Role Instructors

Certified Instructor + Registered Proctor

What's Inside

INSTRUCTOR TRACK

- I-1 Before Class — Pre-class preparation checklist
- I-2 Training Day — Class setup, teaching, and wrap-up
- I-3 After Class — Follow-up and referrals

THE HANDOFF

- Transitioning from instructor to proctor in the same session

PROCTOR TRACK

- P-1 Do You Qualify? — Eligibility checklist
- P-2 Get Registered — Registration checklist
- P-3 Find Your First Client — Outreach checklist
- P-4 Run the Exam — Day-of proctor checklist
- P-5 After the Exam — Post-session checklist
- P-6 Cold Call Tracker — Prospect worksheet

This toolkit covers the complete dual-role journey — from booking your first class to handing students their certificates. Keep it. Print it. Use it at every session.

A ServSafe class is not a walk-in event. The difference between a class that runs smoothly and one that struggles almost always comes down to preparation — yours and your students'.

DETERMINE YOUR CLASS FORMAT

- Identify whether this is a Ground Zero class or a Refresh

Ground Zero: students have little or no food safety knowledge — allow 3–4 hours of class plus mandatory pre-work. Refresh: recertifying students who know the material — allow 1–1.5 hours.

- Be honest with the client — no amount of class time replaces pre-work

A student walking in cold has a poor chance of passing, regardless of how good the class is. Set that expectation up front.

■ **SafePrep** — The Smart Pre-Work Tool SafePrep replaces the \$70 ServSafe Manager Book. Students download it for as little as \$9.99 and study on their phone — anywhere, anytime. Students who complete SafePrep pre-work before class arrive prepared, cover material faster, and pass at higher rates. No books to order. No editions going out of date. Just better results. Available on the App Store: SafePrep by Novern Management

SIX WEEKS BEFORE CLASS

- Secure a facility — quiet, adequate lighting, enough seating, ADA accessible

If the exam will follow the class in the same room, the facility must also meet ServSafe exam location standards. No food safety reference materials visible.

- Confirm there is a projector or screen available for your presentation
- Advertise the class or confirm enrollment with the client
- Determine class size and confirm number of students with the client

FOUR WEEKS BEFORE CLASS

- Ask about any special needs — disabilities, language barriers, accommodations

Accommodations must be submitted to ServSafe at least 15 business days before the exam date.

- Confirm all students will complete SafePrep pre-work before class day

Direct students to download SafePrep from the App Store. Ground Zero students should score 70%+ on the practice exam before arriving.

- Send students their SafePrep download instructions

ONE TO TWO WEEKS BEFORE CLASS

- Confirm facility reservation
- Prepare your presentation materials — slides, activities, case studies
- Gather supplies: extension cords, laptop, projector, clicker, markers
- If exam follows class same day: log into ServSafe.com and create the exam session

Enter the number of students and generate your Proctor Access Code. Keep it private.

- Confirm students have purchased their exam access codes through ServSafe.com

Students purchase their own online exam access code at ServSafe.com. They will need it the day of the exam.

- If any accommodations were requested, confirm they have been approved by ServSafe

DAY BEFORE CLASS

- Create your class list and seating chart
- Confirm all students have completed SafePrep pre-work

Follow up with anyone who has not. A student who skips pre-work is unlikely to pass and will slow the class down.

- Charge your laptop and test your presentation
- Pack your supplies — laptop, clicker, extension cord, surge protector, markers, printed materials

■■ Your pass rate is your reputation. Students who do the SafePrep pre-work pass at significantly higher rates. Make it a firm requirement — not a suggestion.

CLASS DETAILS

Client / Employer:

Class Date:

Class Format:

Number of Students:

Facility Address:

Exam Same Day? ■ Yes ■ No

Arrive prepared. Your students' time is valuable — a tight, well-run class is the best advertisement you have.

ARRIVE AT LEAST ONE HOUR BEFORE CLASS STARTS

- Check in with the facility host or contact
- Set up tables and chairs — enough for all students plus an instructor table
- Set up and test your projector, laptop, and presentation

Run through the first few slides. Confirm the screen is visible from every seat.

- Check extension cords, connections, and that everything is charged or plugged in
- Walk the entire room and remove or cover ALL food safety reference materials

Posters, charts, whiteboards, temperature logs, study guides, digital displays — anything that could relate to exam content must be gone before students arrive. This applies to both the class AND the exam.

- Set out any printed materials, name cards, or supplies for students
- Locate restrooms, light switches, thermostat, and emergency exits
- Have your class list and seating chart ready at the door

WHEN STUDENTS ARRIVE

- Welcome each student and confirm their name against your class list
- Confirm every student completed SafePrep pre-work before class

If a student did not complete the pre-work, have an honest conversation. They can still attend class but their odds of passing drop significantly.

- Confirm every student has their exam access code ready

Students purchase this themselves at ServSafe.com. They need it for the online exam. If they don't have it, they cannot take the exam today.

- Collect photo IDs — you will need them for the exam portion

DURING CLASS

- Introduce yourself — share your background and why food safety matters
- Set expectations up front — explain the exam format, passing score (70%), and time limit

90 questions, 70% to pass, 2 hours for the online exam.

- Teach to the material — use your own curriculum or the ServSafe framework

Ground Zero: plan for 3–4 hours. Refresh: plan for 1–1.5 hours. Stay flexible — read the room.

- Use real-world examples, case studies, and discussion — adults learn by doing, not listening

Students retain 90% of what they say and do. Lecture alone is the least effective method.

- Take breaks — give students an incentive to return on time
- Address all questions during class

Once the exam begins you cannot answer any content questions. Get everything out in the open before the exam starts.

- If you do not know an answer, say so — never bluff

Adult learners will lose confidence in you immediately if they catch a bluff.

- Stay on schedule but stay flexible — a confused room needs more time, not less

✓ The old model was 6–8 hours of classroom instruction. SafePrep pre-work compresses that to 3–4 hours without sacrificing pass rates. Students who prep on their own time arrive ready — your job is reinforcement, not introduction.

WRAPPING UP CLASS — BEFORE THE EXAM

- Do a final review of the highest-yield topics
- Ask the room — "Does anyone have any questions before we begin the exam?"

This is critical. Once the exam starts you cannot answer any content questions, give hints, or provide clues of any kind.

- Confirm all students are ready and have their exam access codes available
- Transition to proctor role — see the Day-of Proctor Checklist (Checklist 4)

If exam is same day, proceed directly to the proctor checklist. If exam is scheduled separately, confirm the date and remind students to review SafePrep before that session.

DON'T — TRAINING DAY

- ✗ Read large portions of text directly to students — they can read it themselves

Adult learners disengage immediately when an instructor reads from slides or a book. Know your material.

- ✗ Leave food safety reference materials visible in the room during the exam

Everything must be cleared before the exam begins — even your own teaching materials.

- ✗ Answer content questions once the exam has started — not even a hint

All questions must be resolved before the first exam access code is entered.

- ✗ Bluff on a question you don't know — tell them you'll find out and follow up

- ✗ Let a student take the exam without completing pre-work without warning them of the risk

- ✗ Let a student start the exam without a valid photo ID

- ✗ Allow students to have phones or devices at their exam seat

The class is over and the exams are closed out. Now you work the relationship.

IMMEDIATELY AFTER THE EXAM

- Email certificates to each student who passed from ServSafe.com

Certificates are available immediately after the exam is closed out. Send while you are still on-site.

- Save a copy of each certificate to your records

File by student name, employer, exam date, and certificate expiration date. This is your renewal pipeline.

- For students who did not pass — explain the retest policy clearly

They may retest twice within 30 days. If a third attempt is needed, they must wait 60 days. Maximum 4 attempts in 12 months.

- Return all photo IDs
- Report any irregularities to ServiceCenter@restaurant.org

■ Your certificate file is your renewal pipeline. ServSafe certification is valid for 5 years. Every certificate you save today is a future client. You already know exactly when they need to recertify.

FOLLOW UP WITH THE CLIENT — SAME DAY OR NEXT DAY

- Send a thank-you to the manager or owner who booked you
- Share the pass rate — managers want to know their investment paid off
- Ask for a referral — "Do you know any other businesses that need this?"
- Ask about other locations if they are a multi-unit operator
- Note certificate expiration dates and set renewal reminders
- Log the session as a closed client in your Cold Call Tracker

THANK-YOU MESSAGE TEMPLATE

Hi [Name], just wanted to follow up and confirm that [X] of your staff passed their ServSafe exam today and received their certificates. It was a pleasure working with your team. If you know of any other restaurants or businesses that need to get certified, I'd really appreciate the referral. I'll have everything on file when it's time to recertify. Thanks again!

SESSION RECORD

Client / Employer:

Class Date:

Number of Students:

Number Who Passed:

Certificate Expiration Date:

Referral Contact Provided:

After Class

Certified Instructor — Post-Class Checklist

FoodSafetyMadeEasy.com
Instructor Series

Renewal Reminder Set For:

This is the moment that makes the dual role valuable — and the moment most new instructor/proctors underestimate. You are switching hats in the same room with the same students. The transition must be clean and deliberate.

END OF CLASS — BEFORE YOU SWITCH ROLES

- Complete your final content review and answer all remaining questions

Once the exam begins you cannot answer any content questions, give hints, or provide clues. Everything must be resolved now.

- Formally announce the transition to the room

"Class is now over. We are moving into the exam. I am now acting as your proctor, not your instructor. I cannot answer any questions about the material from this point forward."

- Remove or cover ALL teaching materials — slides, whiteboard notes, flip charts, printed handouts

Your own teaching materials are reference materials. They must be cleared before the exam begins.

- Confirm all students have their exam access codes ready

- Have your Proctor Access Code ready — keep it private

CAPITAL LETTERS, dashes required. You will enter it on each student's device. Never read it aloud or let students see it.

■■ The room that was a classroom one minute ago is now an exam room. The standard is the same as if you walked in as a proctor only — nothing visible, nothing audible, nothing accessible that could help a student answer a question.

NOW PROCEED TO THE DAY-OF PROCTOR CHECKLIST

- Check and collect photo IDs if not already done
- Have students sign the Entry/Exit Log
- Assign seats and clear personal items from exam area
- Read the "Read Before Exam" script aloud
- Verify each student's name on screen before entering your Proctor Access Code to start

Your name should not appear. If it does, have the student log in correctly before proceeding.

- Enter your Proctor Access Code on each device to start each student's exam
- Monitor the room — you are a proctor now, not a teacher
- Enter your Proctor Access Code on each device to close out each student's exam

Results are available immediately. Scores are not recorded until you close out.

✓ You wore two hats today. The class prepared them. The exam proves it. When they pass — and they will pass at higher rates because of the pre-work and your class — that certificate has your name on the process. That's your reputation.

BEFORE YOU CAN REGISTER AS A PROCTOR, CONFIRM YOU MEET THESE REQUIREMENTS

- I hold a current ServSafe Food Protection Manager Certification

Your certification must be active — not expired. It is valid for 5 years from the date you passed.

- My certification has not expired

Check the expiration date on your certificate. You cannot register or proctor with an expired cert.

- I am prepared to renew my proctor registration annually

Proctor status must be renewed every year through ServSafe.com.

- I understand I am a proctor, not an instructor (unless separately credentialed)

Proctors administer the exam only. Instructors can also teach the course. These are separate credentials.

- I have reviewed the ServSafe Instructor/Proctor page at ServSafe.com

Go to ServSafe.com → Instructors/Proctors → Learn to confirm current requirements for your state.

- Some states have additional requirements beyond the national ServSafe standard. Check your state's regulations at ServSafe.com under "State Regulations" before you register.

NOTES

STEP-BY-STEP REGISTRATION AT SERVSAFE.COM

- Go to ServSafe.com and click "Instructors/Proctors"
- Click "Register/Renew as an Instructor or Proctor"
- Create an account or log in if you already have one
- Select "Registered Proctor" as your role

If you also want to teach the course, select "Certified Instructor and Registered Proctor" (dual role).

- Enter your ServSafe Manager Certification number when prompted

This is on your certificate. ServSafe will verify it is current and valid.

- Read and accept the Proctor Agreement

You are agreeing to follow the ServSafe Exam Administration Handbook procedures at every session.

- Pay the registration fee

Check ServSafe.com for current pricing — fees can change.

- Save your confirmation and note your Proctor Registration Number

You will need this number every time you schedule an exam session.

■ After registering, download and read the ServSafe Exam Administration Handbook immediately. You are required to keep a copy and follow it at every session.

MY REGISTRATION DETAILS

Proctor Registration Number:

Registration Date:

Annual Renewal Due:

ServSafe.com Login Email:

IDENTIFY YOUR TARGETS

- Contact your local health department and ask for the list of food establishments that require a certified manager

Many health departments publish this list publicly or will provide it on request. This is your most targeted prospect list.

- Search Google Maps for restaurants, hotels, schools, and catering companies within 10–15 miles

Look for establishments with multiple locations — one contact can mean multiple sessions.

- Check if your county health department posts recent inspection reports online

Establishments cited for not having a certified manager are your warmest leads.

BEFORE YOU CALL OR EMAIL

- Decide what you will charge per candidate before any conversation
- Have at least 3 open dates ready to offer
- Have your Proctor Registration Number ready to share if asked

PHONE SCRIPT — WHAT TO SAY WHEN SOMEONE PICKS UP

"Hi, my name is [Your Name]. I'm a registered ServSafe proctor in the area. I help restaurants get their managers certified quickly and affordably — I come to your location and administer the exam on-site. Do you currently have a certified food safety manager on staff?"

AFTER THE CALL

- Send the follow-up email with the student steps attached the same day

See the Cold Call Email Template and Student Steps handout in this toolkit.

- Log the contact in your Cold Call Tracker (Checklist 6)
- Set a follow-up reminder for 3–5 business days if no response

■ Your best first client is often a local independent restaurant, not a chain. Owners make decisions on the spot. One yes leads to referrals within their network.

BEFORE EXAM DAY — CREATE YOUR EXAM SESSION

- Log into ServSafe.com and go to Exam Management
- Click "Create Class" and select the correct exam type (Food Manager or Alcohol)
- Enter the number of students

You must have the correct count — this determines how many access codes are generated.

- Complete the session setup and record your Exam Session Number
- Your Proctor Access Code will be generated — write it down and keep it strictly private

This code is confidential. Never share it with students or read it aloud. You will enter it yourself on each device.

- Download and print your Exam Information Form
- Read and keep a copy of the ServSafe Exam Administration Handbook

SESSION DETAILS — FILL IN BEFORE EXAM DAY

Exam Session Number: _____

Exam Date: _____

Number of Students: _____

Exam Type:

■ Food Manager ■ Alcohol

■■ PROCTOR ACCESS CODE — CONFIDENTIAL Your Proctor Access Code must be kept private at all times. Never read it aloud or allow students to see it. You must enter it yourself on each student's device — once to START and once to END their exam. Cover the screen when entering. Always enter in CAPITAL LETTERS and include all dashes exactly as shown. Results are not recorded until you close out each student's exam with the code.

Proctor Access Code: _____ - _____ - _____

CAPITAL LETTERS • Include all dashes • Enter on each device yourself • Never share with students

BEFORE CANDIDATES ARRIVE — SET UP THE ROOM

- Confirm exam facility meets NRA requirements: adequate lighting, writing surfaces, seating, heating/cooling, ventilation, ADA compliant
- Walk the entire room and remove or cover ALL food safety reference materials

This includes posters, whiteboards, temperature charts, study guides, signage, tablets with study apps, TVs, and any display that could relate to exam content. Anything visible that could help a candidate answer a question must be gone before anyone walks in.

- Create your seating chart and set out the Examinee Entry/Exit Log
- Confirm any special accommodations are pre-approved by ServSafe

Must be submitted at least 15 business days in advance — no exceptions.

- Ask if anyone has questions before starting the first exam

Once the exam begins you cannot answer any questions, give hints, or provide clues of any kind. Address everything before the first access code is entered.

WHEN CANDIDATES ARRIVE

- Check and collect each candidate's photo ID upon arrival

Acceptable: driver's license, state ID, military ID, employee ID, green card, or valid passport. No photocopies. Retain all IDs for the duration of the exam.

- Have candidates sign the Entry/Exit Log

They must sign every time they leave the room — including restroom breaks.

- Assign seats and direct candidates to store all personal items away from their seat

No phones, bags, calculators, or electronic devices at or near the exam seat.

- Notify candidates they have 2 hours to complete the exam

Exceptions only for pre-approved accommodations.

- Read the "Read Before Exam" script from your session confirmation email aloud to all candidates
- For each student: verify their name (not yours) is displayed on screen before entering your Proctor Access Code to start

If your name appears instead of the student's, stop — have the student log in correctly first.

- Enter your Proctor Access Code on each student's device to start their exam

You must do this yourself. Students cannot start without you. Keep the code covered when entering.

DURING THE EXAM

- Walk the room periodically to monitor — do not disturb candidates
- Only one candidate may use the restroom at a time; log extended absences as an irregularity

× DON'T — DAY OF EXAM

× Allow a student to start without you entering the Proctor Access Code

× Enter the code without first verifying the student's name is on screen — not yours

× Read the access code aloud or allow any student to see it

× Allow students to have phones, bags, or any devices at their seat

× Accept a photocopy of an ID — original only

× Allow more than one student in the restroom at a time

× Answer any questions, give hints, or provide clues once the exam has started

All questions must be addressed before the first exam begins. Once started, you are silent on content.

× Let a student leave the room during the exam and return — they forfeit and must retest

× Leave any visible food safety reference materials in the room — posters, charts, whiteboards, study guides, digital displays, anything

The exam environment must be completely clear of any material that could relate to exam content.

× Forget to close out each student's exam with your Proctor Access Code — results will not record

CLOSING OUT EACH STUDENT'S EXAM

- When a student finishes, go to their device and enter your Proctor Access Code to end their exam

Results are not recorded until you close out the exam. This step is required for every student.

- Scores are available immediately on screen after you close out

- Repeat for every student — each one requires your code to start and to end

IMMEDIATELY AFTER THE LAST STUDENT FINISHES

- Return all photo IDs to candidates
- Email the certificate to each student from ServSafe.com

Certificates are available immediately after the exam is closed out. Send while you are still on-site.

- Save a copy of each certificate for your own records

Keep a physical or digital file organized by student name, employer, exam date, and certificate expiration date.

- Report any exam irregularities or technical issues to ServiceCenter@restaurant.org

■ Keep your certificate file organized. If a student loses access to their ServSafe account, you can provide their certificate from your records. This builds trust, loyalty, and repeat business.

DON'T AFTER THE EXAM

✗ Provide exam results over the phone or by email

Results are confidential per ServSafe security requirements. Direct candidates to ServSafe.com to access their own scores.

✗ Share, discuss, or repeat any exam questions or content with anyone

This violates your proctor agreement and can result in revocation of your proctor credentials.

✗ Dispose of any print exam materials without securely destroying them

FOLLOW UP WITH THE MANAGER OR OWNER — SAME DAY OR NEXT DAY

- Send a thank-you message to the manager or owner who booked you

Keep it brief. Confirm all students received their certificates and leave the door open for future sessions.

- Ask for a referral — "Do you know any other restaurants or businesses that might need this?"

A warm referral from a satisfied client is your fastest path to the next booking.

- Ask about their other locations if they are a multi-unit operator

One franchise owner can mean 5, 10, or 20 locations. Always ask.

- Note each certificate expiration date and set a reminder to reach out for recertification

ServSafe certification is valid for 5 years. You already know when they need to renew.

- Log the completed session in your Cold Call Tracker as a closed client

■ Your certificate file is your renewal pipeline. Every certificate you save today is a future client. Five years from now you will know exactly who needs to recertify and when.

THANK-YOU MESSAGE TEMPLATE

Hi [Name], just wanted to follow up and confirm that all of your staff received their ServSafe certificates today. It was a pleasure working with you. If you know of any other restaurants or businesses that need to get certified, I'd really appreciate the referral. Don't hesitate to reach out when it's time to recertify — I'll have everything on file. Thanks again!

SESSION RECORD

Client / Employer:

Session Date:

Number of Students:

Certificate Expiration Date:

Referral Contact Provided:

Follow-up Reminder Set For:

Track every outreach contact. Follow up until you get a yes or a clear no.

Contact #1		Date:
Company:		Email sent? <input type="checkbox"/> Yes <input type="checkbox"/> No
Contact:		Result:
Phone:		Follow-up date:
Email:		
Notes:		

Contact #2		Date:
Company:		Email sent? <input type="checkbox"/> Yes <input type="checkbox"/> No
Contact:		Result:
Phone:		Follow-up date:
Email:		
Notes:		

Contact #3		Date:
Company:		Email sent? <input type="checkbox"/> Yes <input type="checkbox"/> No
Contact:		Result:
Phone:		Follow-up date:
Email:		
Notes:		

Most bookings come after 2–3 follow-ups. A "not now" is not a "no" — note the best time to call back and try again next quarter.