

Enrollment Agreement

Coach starts documents from link on Candelen webpage

Document is sent to participant to complete and sign
Triggered by participant name and email are not empty
Email subject: Quality First Enrollment Agreement
Email Body: A new Quality First Enrollment Agreement is ready for your site, {fields.432AF690-DE00-0000-000021F6:Participant_Name}. Please sign the document as a part of your Quality First Enrollment. A copy of the document will be emailed to you upon completion.

Participant completes and signs Enrollment Agreement

PDF of signed document is sent to participant and coach
Triggered by Participant Signature
Email Attachment: PDF Enrollment Agreement
Email Subject: Completed Enrollment Agreement
Email Body: An Enrollment Agreement has been completed for site # {fields.432AF690-DE00-0000-000021F6:FTF_ID}.

Additional Bots

Names Slate
"YYYYMMDD
#Site
Enrollment
Agreement"

Pre-fill drop
down from
OneDrive
"Coaching
Roster"

Lock Slate when
completed
triggered by
participant
signature