

QF Enrollment Packet

Form Order and Access

1. Enrollment Agreement - Coach/Main Contact
2. Program Designation - Coach/Main Contact/Program Designee
3. E-Verfiy - Coach/Main Contact
4. E-Verfiy Attachment - Upload Required - Main Contact
5. Program Type - Coach/Main Contact
6. Licensed Capacity - Coach/Main Contact
7. Child Care License - Upload Optional - Main Contact
8. Photo and Video Release - Coach/Main Contact

Coach starts document through link

Bot auto-fills fields that are used in multiple forms

Coach completes basic program information and signs documents.

When a document asks for "Director/Owner", the Main Contact should be entered

When a document asks for the "Site Name", the Site Name and not the Organization Name should be entered

Email sent to Main Contact
 Trigger: Slate Revision Completed
 Subject: Quality First Enrollment
 Body: Your Quality First coach, {fields.B16DB759-2F00-0000-000021F6:Coach_Name}, is sending you a packet of documents that must be completed as a part of your enrollment in Quality First. Once all of the documents have been completed, copies will be sent to you via email.

Main Contact Completes and Signs Documents and Uploads Confirmations

Program Designee Signs and Dates and Program Designation Form

Email sent to Program Designee
 Trigger: Slate Revision Completed
 Subject: Program Designation Form
 Body: Hi there,
 You have been identified as the Program Designee for {fields.B16DB759-2F00-0000-000021F6:Participant_Name} by {fields.B16DB759-2F00-0000-000021F6:Authorized_Name}. Please sign the document to finalize the program's enrollment in Quality First.

Email sent to Main Contact and QF Coach
 Trigger: Program Designee Signature is filled
 Subject: Completed Enrollment Documents
 Body: Thank you for completing your Quality First Enrollment documents for site #{fields.B16DB759-2F00-0000-000021F6:FTF_ID}. Additional documents may need to be completed through the Extranet. Copies of the documents are attached to this email.

Bots Utilized in Workflow

Pre-fill Doc with Data Taken from Enrollment Agreement

The following information is copied to other documents in the workflow:

Coach Name, Coach Email, QF ID, Main Contact Name, Main Contact Email, Site Name

Pre-fill Doc with Data Taken from Program Designation

The following information is copied to other documents in the workflow:

Address, City, State, Zip Code

Pre-fill Drop Downs from Excel Spreadsheet

Fills from OneDrive document "Coaching Roster"

Provides drop down options for Coach Name and Coach Email