

Licensed Capacity Verification

Coach starts document from coach webpage



Document is sent to participant to complete license information, upload a copy of their license (optional), and sign
Triggered by Participant ID is not empty
Email Subject: Quality First Enrollment Agreement
Email Body: {fields.AF486FB5-EE00-0000-000021F6:Coach_Name} has created a new Quality First Enrollment Agreement that needs to be completed and signed for your program.

Participant completes form and signs. Option for upload



Email is sent to participant, coach, and Gabi
Triggered by Participant signature
Email Attachment: PDF License Verification and Copy of license if uploaded
Email Subject: Completed Licensed Capacity Verification
Email Body: A Licensed Capacity Verification has been completed by site # {fields.AF486FB5-EE00-0000-000021F6:Participant_ID}. A copy of the document is attached to this email.

Additional Bots

Pre-fill coach drop down from OneDrive "Coaching Roster"

Lock slate when completed triggered by participant signature

Name Slate "YYYYMMDD Site# Licensed Capacity"