

Participant Intake Form

Coach starts document using link

At the bottom of the document, the coach will answer yes or no to the following statement:
"I am done entering information into the Participant Intake Form"

IF YES

Completed document is emailed to program and coach.
Trigger: Done Entering = Yes
Subject: Participant Intake Form
Body: A Participant Intake form has been submitted for site #{fields.4E708A66-EE00-0000-000021F6:FTF_ID}. A copy of the completed document has been attached to this email.

IF NO

Signing link is sent to coach
Trigger: Done Entering = No
Subject: Site {fields.4E708A66-EE00-0000-000021F6:FTF_ID} Participant Intake
Body: You have a Participant Intake Form that has not been completed in airSlate. Please use this signing link to complete filling out the form. Once you have completed all fields, change the completion confirmation to "Yes".

IMPORTANT NOTE!

The process above will keep repeating until "Yes" has been selected. To access the document, keep your signing invitation or go into the document through the Participant Intake Flow in airSlate.

Additional Bots Used

Name Slate
"YYYYMMDD Site # Participant Intake"
Triggered by: Required Fields are not empty

Lock Slate
Locks document from editing after the "I am done entering information" field is "Yes"
Triggered by "Yes" answer

Pre-Fill Coach Drop Down
Fill coach name and email options from Excel document on OneDrive "Coaching Roster"