

Program Type Workflow

Document started by coach



Email sent to participant to complete document
Triggered by: Coach email and ID are not empty
Email Subject: Program Type Form
Email Body: Hi {fields.8F2DA319-0F00-0000-000021F6:DirectorOwner Name},
Your Quality First coach is sending you a Program Type form to complete as a part of your Quality First Enrollment. Please use the link to complete and submit the document.



Document completed by participant



Email sent to participant and coach
Triggered by: Director signature not empty
Email Attachment: PDF of completed document
Email Subject: Program Type Form Completed
Email Body: A Program Type form has been completed for site # {fields.8F2DA319-0F00-0000-000021F6:Participant ID}. A copy of the completed document is attached to this email.

Additional Bots

Pre-Fill Drop
Down from Excel
365
Linked to "Coach
Roster" saved on
OneDrive

Lock Slate
Triggered by
Director
Signature