# Managing Forms and Phases

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# A Few Things to Note:

- This session is being recorded.

- The recording will be automatically Emailed to all registrants of this session, as soon as it becomes available.

- You can and should download a copy of this presentation from the Handouts section of the GoToWebinar sidebar.

- You can type in your questions any time within the questions field of GoToWebinar.

# After this session, you will be able to:

- Identify forms available in PowerFTO.

- Edit forms and phases in PowerFTO.

- Navigate the PowerFTO homepage.

- Export and Print Forms Data in PowerFTO.
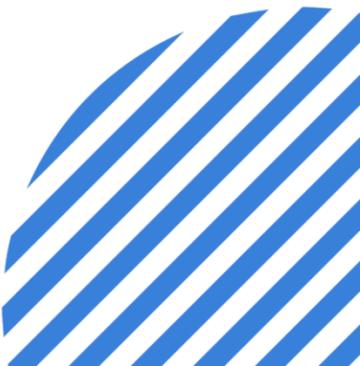
# What Forms are available in PowerFTO?

✓ Can vary depending on type of program selected.

✓ Organizations can use forms provided by PowerFTO or create their own.

✓ Onboarding Programs have three mandatory forms: Daily Observation Report, End Phase, and End Program.

✓ Edits can be made to the existing forms provided by PowerFTO or the forms uploaded by the organization as needed.

# What Phases are available in PowerFTO?

✓   Can vary according to organizational needs.

✓ Can be modified by Program Coordinators and Site Administrators.

✓ Changes affect current trainees immediately. (I.E., new DORs will continue to be defaulted to their current phase. The phase order will be updated and the Trainee will have "skipped" the moved phase)

# Exporting Forms Data

1. Select 'Search' in the left menu

2. Select date range and any additional filters.

3. Select the check boxes of the forms you want to export.

4. Click on the 'Export' button located in the top right.

Note: Once your export is ready you will receive an email and notification up in the top notifications area to download your data.

Trainees can export/print their own DORs while they're active in the program. It either has to be their step of the workflow (I.E., trainee sign-off) or in a 'Completed" state.
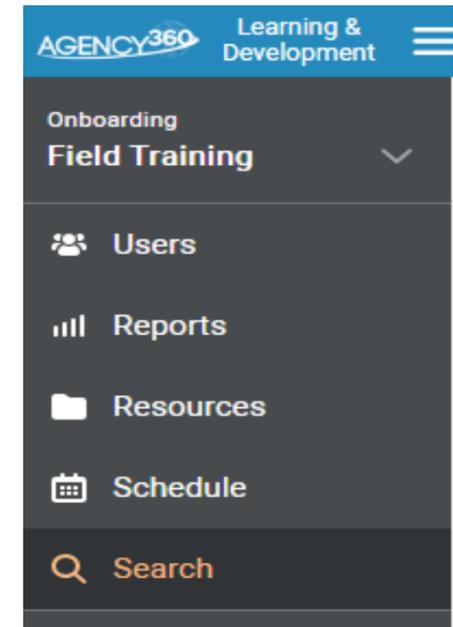
# You should now be able to:

- Identify forms available in PowerFTO.

- Edit forms and phases in PowerFTO.

- Navigate the PowerFTO homepage.

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Questions?