

PTDI Annual Report Instructions

Step 1 – Create a User ID

To begin the annual report go to this link: <https://form.jotform.us/72136035620143>

You see a page that looks like this. This form will create you're a personalized, custom link for you. Enter your email address and today's date. Click submit.

Create a User ID for the Annual Report

DO NOT RETURN TO THIS FORM ONCE IT IS COMPLETED!

This form is used solely to create a unique link for your Annual Report submission.

When filling out your annual report, only use the unique link that is created when you click "Submit" at the bottom of this page. The unique link will also be emailed to you. Be sure to check your spam filter if you do not see it in your inbox.

Using the unique link will save your data, allowing you to leave the form and return to it later if you are unable to complete it in a single session.

Name

First Name
Last Name

Email

example@example.com

Today's Date

Date

Step 2 – Get Your Personalized URL

After you click submit you should see a confirmation page like this. This is your new, personalized, custom URL. It is based off your email and date you entered in step 1. You should also receive an email with your new URL. **BE SURE TO USE THIS NEW, PERSONALIZED LINK AS YOU WORK ON THIS YEAR'S REPORT.** As you work data is saved to your personal link.

Click the link in the confirmation page (or the one you received via email) to begin filling out the Annual Report.

We received your submission!

Thank you for creating a user ID for the PTDI Annual Report Form.

Please click this link to continue completing the the Annual Report Form.

<https://form.jotform.com/71255587081157?session=tim@ptdi.org08-10-2017>

This is your personalized link. Use it to come back to the form and continue filling it out later.

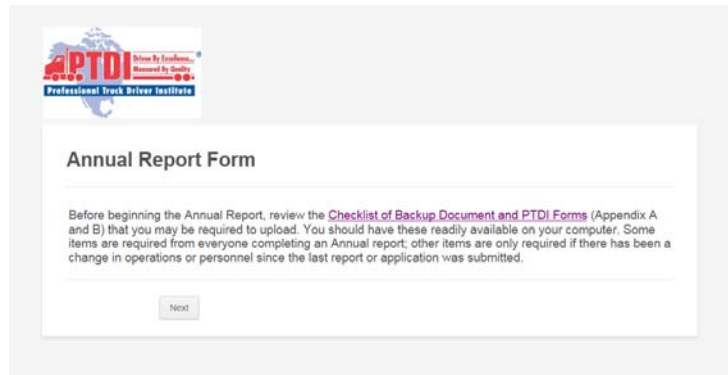
You will also receive this link via e-mail.

To avoid loss of your form data we recommend:

- * Use the same computer and browser to complete the form.
- * Fill out all the form fields first and wait until the very end to upload documents.
- * Try and have all documents ready for upload, add them in one session, then hit "submit" after everything has been uploaded.

Step 3 – Introduction Page

After clicking your new, personalized link you should be taken to a page that looks like this:



3.A -- Need to download the checklist and forms?

To download the checklist and forms, click the link on the introduction page. This link opens to the reports page on the PTDI web site (shown below). Click the document name to download.

Annual Reports

Annual Reports are required per the certification standards. Reports are due prior to your certification anniversary.

>> File your annual report. [Use the online Annual Report Form found here.](#)

Before you begin:

- Read [instructions for completing the annual report](#)
- Review the [Annual Report Checklist of Backup Documents](#) you will need to complete the report.
 - Download the forms forms you will need to complete the report
 - Appendix A - [Instructor List](#)
 - Appendix A - [Instructor qualifications](#)
 - Appendix A - [Instructor Staff Development](#)
 - Appendix B - [Course Summary Form](#)
 - You should have these readily available on your computer. Some items are required from everyone. Other items are only needed if there has been a change in operations or personnel since your last report was submitted.

3.B – Once you’ve completed downloading the forms or if you don’t need them, return to Annual Report Form introduction page you were just at.

Click next on the Annual Report Introduction page. This will take you to the first page of the annual report. Proceed to step 4.

Step 4 – Fill out the Annual Report

After clicking next on the Annual Report Introduction page you are taken to the first page of the annual report. It should look like the screen below. Begin completing the fields. When you click next or back any fields that have been filled out, are saved to your personal link.

General Information

The Annual Report Period is based on the due date of the Annual Report, not necessarily the time-frame for which you will be providing data for this report.

Annual Report Period * **Training organization type: ***

Primary Contact for PTDI *

First Name Last Name

Job Title **Phone Number *** - **E-mail ***
Title Area Code Phone Number

School Name (as to be shown on lists, etc.): *

How many certified courses do you have at this location?

1 2 3

Full Name of PTDI-Certified Course #1 **Full Name of PTDI-Certified Course #2**

Full Name of PTDI-Certified Course #3

School Address *

Street Address

Street Address Line 2

City State / Province

Postal / Zip Code

Phone Number - **Toll-Free Phone** - **Fax** -
Area Code Phone Number Area Code Phone Number Area Code Phone Number

Same as above Different

Truck Driving School Address is:

Additional Contacts (up to 2):

	First Name	Last Name	Title	Phone	E-mail
Add'l Contact #1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Add'l Contact #2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Training organization is licensed/approved by (name of agency):

If school is accredited, name of agency:

Step 5 – Complete and submit the report

If you can't finish the report in one work session, that's ok. Use your personalized link to return to your saved data. This was the link emailed to you after step 1 where you entered your email and the date. As long you clicked next while you were working, the form fields should be saved to your link.

IMPORTANT NOTE ABOUT UPLOADING DOCUMENTS:

Wait until the very end to upload your documents. Have them all ready, and at the end in one work session, add them to the report and click submit on the last page.

We also recommend using the same computer and browser for multiple work sessions.

The final page looks like this and requires you to scribe your signature. **Be sure to click submit to finish!**

Part 6: Affidavit in Support of Annual Report, Enrollment Report or Substantive Change Report to PTDI

I certify that the information contained herein is a true and correct representation of all material required by the Annual Report. I have fully disclosed any other relevant information not specifically requested herein which may materially affect the school's continued eligibility for a PTDI-certified course.

Name of Training Institution:

CEO/President/Director (or other authorized personnel): *

First Name

Last Name

Title

Signature

[Clear](#)

Date

 - -

Month

Day

Year

Report Prepared by: *

First Name

Last Name

Title

Signature

[Clear](#)

Date

 - -

Month

Day

Year

Based on information presented, the school may be subject to a random onsite visit or be requested to submit additional documentation.

Submit