

User Information:

This doc will walk you through adding a new user to your database; specifically for the Staff Portal. This allows you to manage new hires, adding students, coaches or anyone else you need to allow access to the database. Follow the steps below for ensuring team access, module access and others to ensure you and your users have correct access.

From the Admin tab—> select Users and select a Add User

Or you can select edit to modify an existing users account.

The screenshot displays the ATS user management interface. On the left, a navigation menu shows 'Admin' > 'Org-Team-Users' > 'Users' selected. The top right section, titled 'Users', includes an 'Organization Filter' dropdown, a 'Reset' button, a 'Show All' checkbox, and action buttons for 'Add User', 'Edit Selected', 'Copy Selected', 'Refresh', and 'Print'. The 'Add User' button is highlighted with a red box. Below this, the 'User Maintenance - New User' form is shown, featuring tabs for 'General Info', 'Teams', 'Modules', 'Email Groups', 'Email/Opt', and 'Partial Admin'. The 'Base Info' tab is active, containing fields for 'Name (first last)', 'User ID', 'Password', 'Email Addr', 'Text Address', 'Title', and 'License #'. The 'Name' field is linked to 'UserName'. Role selection includes checkboxes for Administrator, Coach, Student, Athletic Trainer, Doc/Phy/Nurse, Strength/Condition, PRN Staff, and Other. A 'Force password change on next login' checkbox is also present. A tooltip for the password field lists requirements: at least 8 characters, at least 1 lowercase letter, at least 1 uppercase letter, at least 1 number, and at least 1 special character. The form concludes with 'Save' and 'New' buttons.

The area to the left is the User Maintenance area. It provides you the ability to define the user(s), whether they are an ATS system administrator, coach student or AT staff.

The remainder of the document will highlight what each of the areas and tabs are for.

Navigate the remainder of the tabs, and complete any of the other optional information.

New User/Editing a profile

Make sure to enter all of the users information. Enter their full name, do not use Coach..., or Basketball Coach. Give the appropriate title, a unique user ID and password. Enter an Email address. The remainder of the information on the page is optional.

Decide any further options, will your institution use secure messages or private info. Those option boxes will show here.

Phone/Location— Enter the staff members phone number, office location.

Signature— allows you to upload or generate a signature to utilize on staff forms, or when verifying athlete forms.

Email Signature— Enter your Signature for any outgoing emails from ATS.

ATS— User Account Setup

Home address— Enter your home address in case of emergency

Emergency contact— a person for your admin to contact if needed.

Assign the user the appropriate team access. If they don't have team access, they will not be able to view any patient/athlete

Be sure to give the new user access to modules. If you do not set modules, they will not have any access. You can grant each module individually, or by using the buttons at the bottom, you can grant access to all modules. Also if they need to be allowed claim submission, group emails or other features check those off at the top.

| Module | Access |
|-----------------------|--------|
| Announcements | None |
| Athlete Forms | None |
| Athlete Screen | None |
| Athlete Screening | None |
| Billing | None |
| Concussion | None |
| Distribute Medication | None |
| Documents | None |
| Emergency Contacts | None |

Read/Write Read Only Add Only None

Save New

Read/Write— will grant access to all modules with read/write permissions. Typical setting for athletic trainers.

Read only— will grant read only access to all modules. Typical setting for administrative assistants, or insurance coordinator that needs to see info, but not add anything.

Add only— will grant add only access, giving the user ability to add a note but not see the information they added. Student access to add, but not see info.

ATS— User Account Setup

[Return to Users](#) **User Maintenance - New User**

General Info Teams Modules **Email Groups** Email/Opt Partial Admin

Include this user in group emails for: ?

(none)

- Coed Guest Team
- Men Sent by ATS

Guest Teams

- Guest demo
- Guest test

Joe Tech

- Coed Track
- Men Baseball
- Men Football
- Men Mens Basketball
- Women Softball
- Women Womens Basketball

Joe U East

- Coed Underwater Basketweaving

End of Teams

Select All Unselect All Expand All Collapse All

Save New

Email groups is useful for sending automatic messages to users within your organization. By selecting the corresponding team to each coach, or other user they are able to get an automated email each time a new injury, limitation, or other fields have been entered into the system.

Currently this is also how the COVID-19 specific emails work. By selecting the teams in this section, you are able, if set up to get the emails that tell you someone answered a flagged question.

If using any email provider besides MS outlook, ensure the SMTP settings are configured.

SMTP server— is the email server that you are using.

Login— your email account

Password— email account password

Secure SMTP— mark yes or no to it being a secure server

Port #— may be given to you in your account settings, you may also have to contact your IT staff to gain more information. We can assist you, but most of this information will come from your IT department, or your individual email account settings.

[Return to Users](#) **User Maintenance - New User**

General Info Teams Modules Email Groups **Email/Opt**

Email Opts Smartphone Icons

Email Setup (MS Outlook or specify SMTP email info)

Use MS Outlook ?

SMTP Server

Login

Password

Secure SMTP

Port #

Working Directory

Appointments

Auto-accept appointment requests from athletes

Default min per appt

Open appt purpose

Time Zone

Login Notices

Menu Doc

You can also configure the specific profile settings in the OPTS tab.

This allows you the ability to configure the appointment feature for that user, the time zone for reports, and other notices you might like to turn on.

The working directory can be set in the desktop, if you do not have access, please copy this file link to set the working directory. C:\ProgramData\Keffer Development Services\ATS

Email Opts **Smartphone Icons**

Use the drop-down lists below to choose the icons for the smartphone. This process will

- Icon 1 View Athlete Info
- Icon 2 Add Note
- Icon 3 Injury Plus
- Icon 4 Add Limitation
- Icon 5 Add Modality
- Icon 6 Add Rehab
- Icon 7 Concussion Eval - Quick
- Icon 8 Team Roster

Smartphone Icons— this is the 12 buttons that show when you login to the smartphone portal. Each user has control over what shows. There are several options to allow you to customize that functionality. This is also accessible in the phone, as well as desktop

Partial Administrative Privileges:

The Partial Admin tab allows you to assign certain administrative privileges to your regular users. There are a variety of options, allow you to assign portions that are necessary, without granting complete system access.

[Return to Users](#) **User Maintenance - New User**

General Info Teams Modules Email Groups Email/Opt **Partial Admin**

Check all applicable modules for access

- Site Information
- Team(s) Information
- User Information
- User Reports
- Maintenance - Dropdown/Popup Lists
- Maintenance - ICD-9 Table
- Maintenance - Available Docs/Forms
- Maintenance - Concussion Prompts
- Maintenance - Note Types and Templates
- Maintenance - Athlete Forms
- Maintenance - Staff Pre-Participation Questions
- Athlete Security
- Drug Testing
- Purge Athletes

Select All Unselect All

Save New

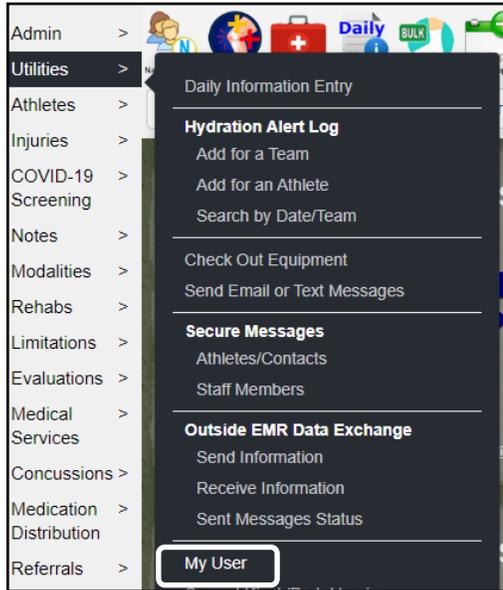
Administrator

Doctor/Physician

The Administrator Check box that is on the General Information portion will supersede any information that is completed here. Do not use both of the options. Again the Administrator box left, will grant the user complete system access.

ATS— User Account Setup

When your new users log in, they will be prompted to complete their Account Recovery Questions. These are mandatory to assist if their password has been tried incorrectly too many times and they are locked out. If they would like to change them, they can use the Utilities tab—> My User and then the reset information tab to see/change their questions and answers.

A screenshot of the 'My User Maintenance' page. The page has a white background and a dark header. The title 'My User Maintenance' is in bold black text. Below the title is a horizontal row of six tabs: 'General Info', 'Smartphone Icons', 'Emergency Contact', 'My Photo', 'My Signature', and 'Reset Login Info'. The 'Reset Login Info' tab is highlighted in blue. Below the tabs, there are three sets of question and answer fields. Each set consists of a dropdown menu for the question and a text input field for the answer. The questions are labeled 'Question #1', 'Question #2', and 'Question #3'. The answers are labeled 'Answer #1', 'Answer #2', and 'Answer #3'. At the bottom of the form is a blue button labeled 'Save Login Reset Info'.

The users can choose from the supplied question list, provide their answer and they will be able to log in.