

Athlete Forms:

Creating forms table of contents.

This document will walk you through, creating new forms, editing or changing existing forms. Making the paperwork lists and how to make sure the completed forms check off the paperwork items.

Task:	Page:
Site Info setup	2
<u>Step 1 Form Name Maintenance</u> 3-5	
Form Maintenance	3-4
Explanation of Maintenance screen	Bot. 4-5
<u>Step 2 Creating Forms</u> 6-26	
Update Athlete Forms	6
Explanation of for Creation Screen	7-8
Question Formatter	9
Previewing Forms	10
Selecting New Question Types	11
<u>Question Type Explanation</u> 11-26	
Note/Title/Info	12-13
Explain	14-15
Yes/No, Yes, No	16-17
Parent/Sub/Dependent	18-19
Range	20
Formula	21
Drop-Down	22
Option Boxes	23
Date	24
Fill In	25
All That Apply	26
Using Injury Forms	27
Using Outcome Forms	28
<u>Step 3 Paperwork List</u> 29-32 : Paperwork VIDEO	
Paperwork & Paperwork 1 Time list	29
Paperwork List in Desktop	30
Paperwork List in Staff Portal	31
Paperwork Verification (Inserting Paperwork list in athletes profiles)	32
Interacting with Completed Paperwork	33
Paperwork Complete Check Box	34
<u>After Forms Have Been Submitted</u>	
Reports for Athlete Forms	35
Interacting with Athlete Forms	36-37

ATS allows you the ability, and flexibility to collect a variety of electronic forms, minimizing the amount of papers you then have to scan, attach, and file. ATS does have a large library of premade forms, that you can copy and change to fit for your needs. You also are able to create from scratch any form you want completed.

There is also a Creating Forms Training Video, if you prefer that. To view please click [HERE](#).

Site Info Settings:

The first steps you need to verify that are set, are settings within Site Info. You will need to verify that the Athlete Portal settings are turned on, so they will have access.

To complete the forms, your athletes will need access to the “forms access”. To view files that they have uploaded they will need access to “eFiles”.

“Completed forms list” will show the patient the completed forms. You can decide how many to show in the drop down.

Enable Form Edit– will allow your patients to edit an already existing form, after it has been saved.

Pwork Complete grid– on the patient portal will show the list of paperwork you have created. If you have done necessary set up they will become checked off for them to see. See linking [forms to paperwork](#).

“Verify button”– allows completed forms to be verified the next year, if content has not changed.

“eFiles during New/New”– will show any eFile you have available during the registration process.

“Print blank form”– allows athletes to print blank copies of the electronic forms.

“Email confirmation”– sends the patient an email that the form was successfully completed and saved.

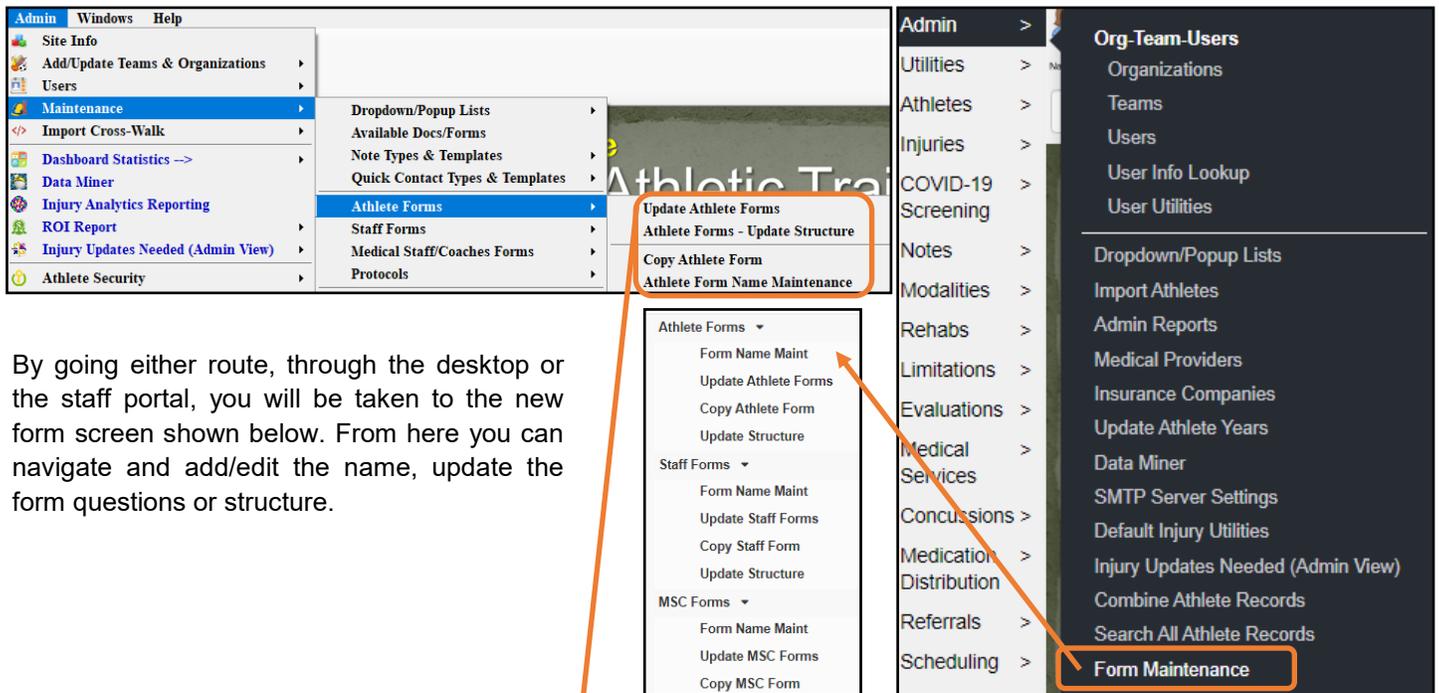
If you will utilize the FCC portal for parents/guardians ensure the “Athlete Information” has a check mark as well.

Step 1—Form Name Maintenance:

Form Name Maintenance is the area you will create the details about your form. This is the first step in the process of creating the actual form for athletes to complete. These are the details about the structure of the form and who is it shown to and if you want signatures on the form. The details about the Form Name Maintenance will be explained below.

With the release of Desktop Version 11.22.11.1 the form name maintenance as well as the other components of the from construction, has been migrated to be completed through the ATS Staff Portal vs. the ATS Desktop.

You can access the Form Maintenance via the Desktop still by going through Admin—> Maintenance—> Athlete Forms and selecting the area you need to go to. Or by going through the Staff Portal and the Admin Menu and selecting Form Maintenance.



By going either route, through the desktop or the staff portal, you will be taken to the new form screen shown below. From here you can navigate and add/edit the name, update the form questions or structure.

Form Name Maint						
Update Athlete Forms		Copy Athlete Form		Update Structure		
<input type="checkbox"/> Include Inactive? <input type="button" value="Remove All XWalks"/> <input type="button" value="Copy From Library"/>						
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Clear XWalks for Form"/> <input type="button" value="Refresh"/> <input type="button" value="Scroll Down"/> <input type="button" value="Scroll Up"/>						
Form Name	Abbrev	Sort	Active	Active From / To		Last Used
Athlete Sign	Parent Sign	Parent See	Athlete See	Days	Injury Form	
18 Concussion Symptom Diary	s	0	Yes			
No	No	No	Yes	0	Yes	

Step 1—Form Name Maintenance:

To begin a new form, select the Add Button. This will open the details screen that allows you to add the form information. Required fields for adding a new form are, *Description, Abbreviation, Sort Number and Make Active, and when you are ready; Make visible to the Athlete and/or parents/guardians, and selecting a signature status for athlete and/or parents/guardians.* Optional form pieces explained later.

This area allows you to see the Inactive forms, old forms, or if you maybe forgot to make it active the first time, it will be in this list.

Remove All XWalks—allows you to remove all of the filters applied for all forms in the descriptions below.

Copy from Library— Allows you to copy the ATS stock created forms. For more info on the copy process see the [Coping from Library Help](#) doc.

Explanation of the Form Name Maintenance fields:

Form Name: The name of your form that will be displayed. Make sure you do not use special characters in the form name.

Abbrev: Abbreviation of the form, to aid in sorting

Sort: Alphabetize or sort numerically; all 0 or 1's =alphabetically, 1,2,3 etc will sort numerically.

Is Active: Whether or not the form is active to be edited or viewed.

Parent & Athlete See: allows you to make the form “live” for the categories to view on their portal/accounts

Active From, To: This will show a form, from a specific date, until a date specified. If these are utilized, you need to change them every year.

Last Used: Your way of showing the last time the form was utilized. Fill this in when you are done with a form, as well as making it inactive. **DO NOT** delete forms that have been completed, to preserve historical records.

Athlete & Parent Signature: you can require a signature, make it optional, or no required signature for patients and parents/legal guardians. Yes= sig required to save, no= no signature required, Opt= signature box will be available, but not required.

Days: How many days you will allow editing of the form before it closes. This is dependent on the selections you made in Site Info as well.

Injury Form: allows you to tie the form to injuries from the athlete side. Example, a concussion check in sheet, can be now tied by the athlete to the injury. See page 31 for further info on how the injury forms work.

Outcome Form: check the box if you want it to be included in a data miner, if you are using patient/staff outcomes as online forms. See page 32 for further info on how the outcome forms work.

Explanation of the Form Name Maintenance fields:

Below are examples of available filters to limit what athletes have access to certain forms. This allows you the ability to build a minor consent to treat form and only have it show to Athletes that are under 18, or a football helmet warning form that only shows to football players. If you have multiple organizations you can also filter so that other schools don't complete your forms and complete their required info.

The screenshot shows a form with the following fields:

- Region Name(s):** A text box containing "Northeast".
- Organization(s):** A list box containing "Joe Tech" and "Joe U North".
- Team Name(s):** A scrollable list box containing: "Coed Guest Team", "Men Sent by ATS", "Joe Tech Coed Track", "Joe Tech Men Baseball", "Joe Tech Men Football", "Joe Tech Men Mens Basketball", "Joe Tech Women Softball", and "Joe Tech Women Womens Basketball".
- Gender(s):** A scrollable list box containing: "Coed", "Female", "Male", and "Men Only".
- Athlete Year(s):** A scrollable list box containing: "Freshman", "Sophomore", "Junior", and "Senior".
- For Athletes <# Years Old:** A text box containing "###".

At the bottom of the form are two buttons: "Save" (in blue) and "Cancel".

Region Name: if your organization utilizes regions, you can assign the form to one specific regions or multiple if available

Organization: Allows you to select an organization or organizations to assign the form to.

Team Name: Allows you to select one or multiple teams to have a form appear for. It will be invisible to all of the others not on those specific team rosters.

For Athletes <# Years Old: allows you to assign a form to an age range under what ever you decide. If you wanted to have anyone under 18 sign a consent to treat form, that form would then be available to that age bracket only.

After you have completed the details for the form, you are ready to progress to the next step, creating the form questions. We do recommend creating all of the Form Names you need to add to the system prior to attempting to create the content.

Step 2—Update Athlete Forms:

The Update Athlete Forms area is the control center for creating and editing the content of your forms.

From the Desktop you can access via, Admin—> Maintenance—>Athlete Forms—> Update Athlete Forms. From the Portal— Admin—> Forms—> Update Athlete Forms.

The screenshot displays the software's navigation menu and the 'Update Athlete Forms' interface. In the top-left menu, 'Admin' is selected, leading to 'Maintenance', then 'Athlete Forms', and finally 'Update Athlete Forms'. A secondary menu on the right shows 'Org-Team-Users' with 'Form Maintenance' highlighted. The main interface features a 'Form Name' dropdown, 'Prev' and 'Next' buttons, and a 'Question Definition' tab. The 'Question Definition' section includes a 'Question Type' list (e.g., Note/Info/Title, Explain, Yes/No), 'Options' (Format as multiple for layout), 'Answer Requirements' (Answer Required?), and a 'Question Gender' dropdown. A note at the bottom states: 'Note: Any changes made to an Athlete Form AFTER an athlete completes it will be reflected if/when the form is printed. This includes any forms that have been signed or not.'

This screen is very similar to the old form creation screen. We have simplified some of the structural components, and streamlined the question building process. There is now no remembering the sub-section numbers or parent numbers, you will link those question directly to the actual question vs. the number.

Explanation of the Form Creation Screen:

Basic Question Structure— There will be other question specific options addressed for that specific question type.

The screenshot shows the 'Form Creation Screen' with the following elements:

- Form Name:** A dropdown menu with '-- Select --' and a 'Preview' button.
- Navigation:** 'Prev' and 'Next' buttons, and a 'Q#' dropdown menu.
- Section #:** A text input field with '###' and a 'Question #' dropdown menu with '###'. There is also a checkbox for 'Question is Active?'.
- Section Name:** A text input field with 'Section name'.
- Parent #:** A dropdown menu.
- Tabs:** 'Question Definition' (active), 'Question Header', and 'Question Text'.
- Question Type:** A list of options including Note/Info/Title, Explain, Yes/No *, Yes Only *, No Only *, Range, Drop-Down List, Option Boxes, Date, Fill In, Formula, and All-That-Apply. A note below says '* Can be used for parent filter' and includes a link to 'General Formula Help'.
- Options:** A checkbox for 'Format as multiple for layout'.
- Answer Requirements:** A checkbox for 'Answer Required?'.
- Question Gender:** A dropdown menu.
- Note:** A pink box at the bottom states: 'Note: Any changes made to an Athlete Form AFTER an athlete completes it will be reflected if/when the form is printed. This includes any forms that have been signed or not.'

This detailed view shows:

- Form Name:** '18 Concussion Symptom Diary' with a dropdown arrow.
- Preview:** A button.
- Prev/Next, Q#:** 'Prev' button, 'Q#' dropdown with '1 Headache', 'of 25', and 'Next' button.
- Section #:** Text input with '1'.
- Question #:** Text input with '1'.
- Question is Active?:** A checked checkbox.
- Section Name:** Text input with 'Symptoms'.
- Parent #:** A dropdown menu.

Form Name— Select the form name to build/edit question for.

Preview— See/track the progress of your form.

Prev/Next, Q#— Allows you to navigate through the question list by selecting the dropdown or the prev/next buttons.

Section# Question Number#— assign the section the question belongs to and what question number it is. The forms will automatically number for you.

Question is Active— identifies if the question is available or not on the athlete form.

Section Name— Allows you to name the section the questions are in.

Parent #— Will show the parent question it is tied to in the dropdown window.

Question Definition— This is the area where you will select the question type from the list, the format, the question gender and whether or not an answer is required.

This detailed view shows the 'Question Type' dropdown menu with the following options:

- Note/Info/Title
- Explain
- Yes/No *
- Yes Only *
- No Only *
- Range
- Drop-Down List
- Option Boxes
- Date
- Fill In
- Formula
- All-That-Apply

A note below says '* Can be used for parent filter' and includes a link to 'General Formula Help'.

Question Header— This area allows you to put up to 300 characters. This is **not the actual question and is not a requirement to save,** but meant to be question specific information or to differentiate. This section will be bolded in the form for you. An example for use of the question header would be in a medical history, the question header could be: Have you ever had any of the following. In the question text you list your first have you had and continue to build question after question in the text.

The screenshot shows a software interface for editing a question header. At the top, there are three tabs: 'Question Definition', 'Question Header' (which is selected), and 'Question Text'. Below the tabs are two buttons: 'Add / Edit Question Header' (blue) and 'Clear Formatting' (red). The main area is a large, empty text input field. At the bottom left of this field, a yellow status bar reads '0 of 300 Total Characters allowed.'. At the bottom of the interface, there are four buttons: 'Save' (blue), 'Print Blank Form' (green), 'Help' (blue), and 'Video' (blue).

To add text to the question header select the Add/Edit Question header button. You will then be see a formatter screen open.

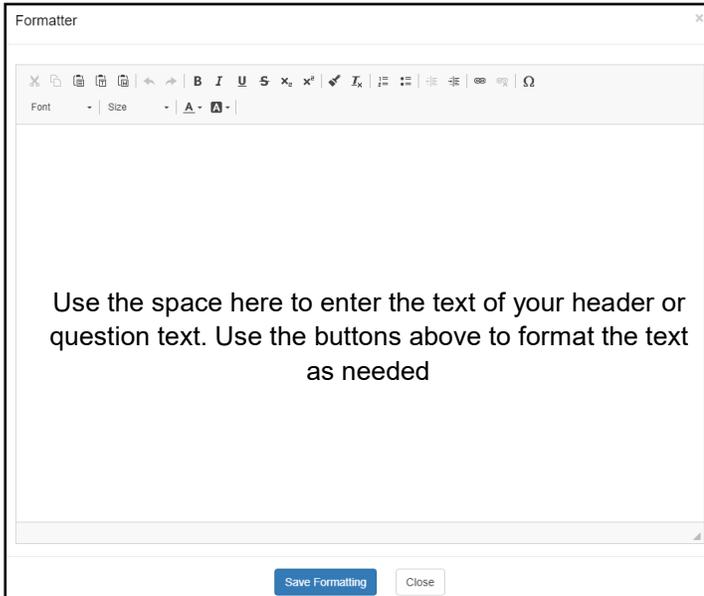
Question Text— This is the area where you will add the information, or copy/paste the information you want to be displayed. There is not a text limit here.

The screenshot shows a software interface for editing question text. At the top, there are three tabs: 'Question Definition', 'Question Header', and 'Question Text' (which is selected). Below the tabs are two buttons: 'Add / Edit Question Text' (blue) and 'Clear Formatting' (red). The main area is a large, empty text input field. At the bottom of the interface, there are four buttons: 'Save' (blue), 'Print Blank Form' (green), 'Help' (blue), and 'Video' (blue).

To add text to the question text select the Add/Edit Question text button. You will then be see a formatter screen open.

Question Formatter:

With the migration to the Staff Portal for creating questions, the construction has also changed. The question text formatter, now gives you better opportunities to create your form the way you want, with font color and size or bolding, underlining etc.



SAVE FORMATTING dose not save your overall question, it only saves the text and formatting you've done on the formatting screen. Be sure to use the regular save button to save your question!!!! The save question is on the question details screen (before you accessed the formatter).

Cut text, Copy Text. Regular paste, Plain text or Paste from Word if supported.

Bold, italic, underline, strike through, subscript or superscript the words

Allows you to copy the question formatting or clear the formatting.

Undo/Redo



Choose the font you would like and the font size.

These buttons allow you to change the font color as well as background color of the text

These buttons allow you to enter a numbered list, a bulleted list. Decrease or increase indentation. Add a hyper link or remove the hyperlink. The last one is to add a special character.

Previewing forms:

Preview: When you are constructing your forms, there is a live and interactive Preview Button. As you are building your forms, selecting the preview button will show you your form, as your athletes will see it. The form is also interactive, so you are able to double check you have the parented questions linked correctly.

The screenshot shows the 'Creating Forms' interface. At the top, there are tabs: 'Form Name Maint', 'Update Athlete Forms' (selected), 'Copy Athlete Form', and 'Update Structure'. Below the tabs, the 'Form Name' is 'Creating Forms'. A 'Preview' button is highlighted with a blue box. Below the form name, there are 'Prev', 'Q# 1', 'A concussion is a brain injury that: Is caused by a bump, blow or jolt to the head or body c', 'of 10', and 'Next' buttons. The 'Section #' is 1 and 'Question #' is 1. A checkbox 'Question is Active?' is checked. The main area shows the 'Athlete Form' preview, which includes a title 'Athlete Form', a note '* Items required to be filled out.', and several question examples: 'What is a Concussion?', 'Info on your TV habits.', 'Yes/No, Yes Only, No Only Question Example', and 'Range and Formula Questions'. A blue arrow points from the 'Preview' button to the previewed form.

The screenshot shows the bottom toolbar of the ATS form builder. It includes a search bar with the text 'General Formula Help'. Below the search bar are several buttons: 'Save', 'New', 'Remove', 'Copy', 'Print Blank Form', 'Help', and 'Video'.

Print Blank Form— will show you in the report viewer, the form you have created. This version is not interactive, and will not be exactly what the athlete form would show.

The screenshot shows the 'Print Blank Form' view of the 'Creating Forms Form'. The form is titled 'Joe Tech' and 'Creating Forms Form'. It includes a 'Your Logo Here' placeholder. The form content is identical to the previewed form, including the 'Question Examples' section with 'What is a Concussion?', 'Info on your TV habits.', 'Yes/No, Yes Only, No Only Question Example', and 'Range and Formula Questions'. The form is presented in a clean, print-ready format.

Selecting Question Types:

The ATS Staff Portal question generation has some upgrades that should help when constructing new forms. When you select the question type, the options that are displayed will only be pieces that can be applied to that question. We have also eliminated the need for the sub-section numbering.

Use the **NEW** button at the bottom to create a new question in your form, new or existing.

The image displays two screenshots of the ATS Staff Portal interface. The top screenshot shows the 'Question Definition' tab with a 'Question Type' dropdown menu. The bottom screenshot shows the 'New Question' button highlighted in red, and a blue box containing explanatory text.

Question Type

- Note/Info/Title
- Explain
- Yes/No *
- Yes Only *
- No Only *
- Range
- Drop-Down List
- Option Boxes
- Date
- Fill In
- Formula
- All-That-Apply

* Can be used for parent filter
[General Formula Help](#)

New **Print Blank Form** **Help**

New Question **Cancel New Question**

When you see the New question and the red Cancel New Question button, you are then able to choose the type of question you would like to build. Every question you add to the system does need to have a question type chosen.

Save **Print Blank Form** **Help** **Video**

Question Types will be individually explained in the following pages:

Note/Title/Info:

This question type is designed to display larger amounts of information on documents, statements that do not require an answer or an action by the athlete or parent besides signing the form at the end. A few examples would be a Concussion or Sudden Cardiac Arrest information sheet, insurance waiver, agreement, etc. Think about any of the paper forms where the athlete has to read and sign.

Select Note/Info/Title:

Add a Section Name if you choose. This optional and can be added to differentiate between sections of your form, Hand/Wrist/Arm vs Shoulder in a PPE.

Form Name: Creating Forms [Preview]

New Question [Cancel New Question]

Section #: 1 Question #: 1 Question is Active?

Section Name: Section name

Parent #: [Dropdown]

Question Definition | Question Header | Question Text

Question Type: **Note/Info/Title**

Options: Format as multiple for layout Answer Required?

Question Gender: [Dropdown]

Buttons: Save, Print Blank Form, Help, Video

If you wish, choose any format, layout or requirements for the question. You can format it for multiple (indent), make an answer required although **DO NOT USE** for note/info/title questions since there isn't anything they can answer, their form will not be able to save. Or assign the question to a gender in your database.

Question Definition | Question Header | Question Text

Add / Edit Question Header [Clear Formatting]

What is a Concussion?

21 of 300 Total Characters allowed

Buttons: Save, Print Blank Form, Help, Video

Add a question header if you wish. Add/edit question header and add the information into the question formatter. Again this serves as the introduction to the information below and not the actual question.

Statements here are limited to 300 characters max

Section #: 1 Question #: 1 Question is Active?

Section Name: Section name

Parent #: [Dropdown]

Question Definition | Question Header | Question Text

Add / Edit Question Text [Clear Formatting]

A concussion is a brain injury that:

- Is caused by a bump, blow or jolt to the head or body
- can change the way a student's brain normally works.
- can occur during practices and/or contests of any sport
- can happen if a student has not lost consciousness
- can be serious even if a student has just been dinged or "had their bell rung"

Buttons: Save, Print Blank Form, Help, Video

Select Question Text and Add/Edit Question Text to add the information to the actual question. Again this area does not have a character limit. Type your question, copy and paste from your other documents.

In the formatter SAVE FORMATTING DOES NOT mean SAVE QUESTION. Only that the text was saved. Be sure to use the SAVE BUTTON on the question screen.

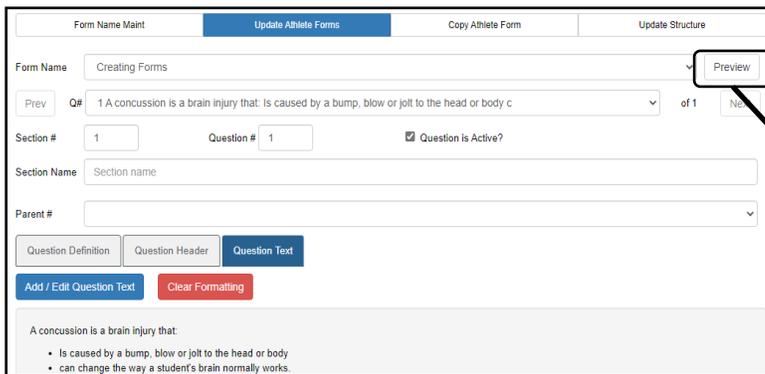
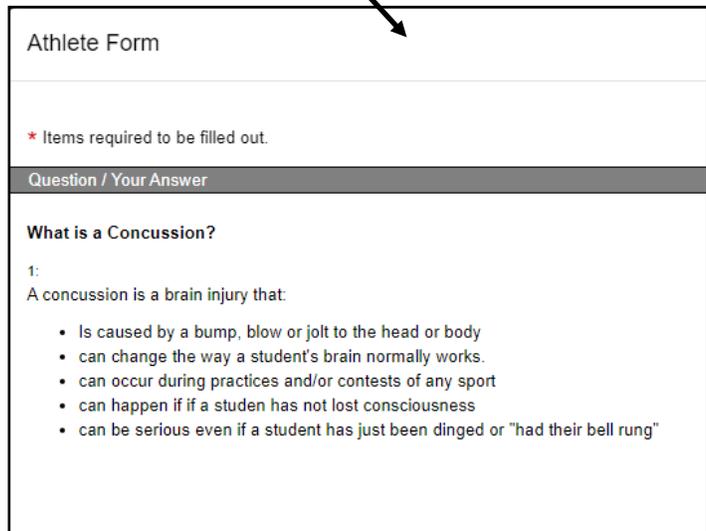
Note/Title/Info CTD:

When you have finished entering all of your question information make sure to save the question do make sure to save from the question screen. When you have successfully created your question you will see the green confirmation bar.



Previewing the form:

Use the preview button to see how your form looks in real time. This will also show you how the athlete will see what you have added.

Explain Question:

Explain questions allow you to ask a question and have the athlete provide the answer to the question there. This could be a question that asks what their Primary Sport is, what their Student ID number is, or if they need to read and initial information. Explain questions are intended to be semi-brief.

Select Explain:

Add a Section Name if you choose. This optional and can be added to differentiate between sections of your form, Hand/Wrist/Arm vs Shoulder in a PPE.

The screenshot shows the 'Creating Forms' interface. At the top, there's a 'Form Name' dropdown set to 'Creating Forms' and a 'Preview' button. Below that, 'New Question' and 'Cancel New Question' buttons are visible. The 'Section #' is set to 1 and 'Question #' is 2. A checkbox for 'Question is Active?' is checked. The 'Section Name' field contains 'Section name'. A 'Parent #' dropdown is empty. The 'Question Definition' tab is active, showing a 'Question Type' dropdown with 'Explain' selected. Other options include 'Format as multiple for layout', 'Answer Requirements' (with 'Answer Required?' checked), and 'Question Gender'. At the bottom of this section are 'Save', 'Print Blank Form', 'Help', and 'Video' buttons.

The next section shows the 'Question Header' tab. It has 'Add / Edit Question Header' and 'Clear Formatting' buttons. The text area contains 'Info on your TV habits.' Below the text area is a character count: '23 of 300 Total Characters allowed.' At the bottom are 'Save', 'Print Blank Form', 'Help', and 'Video' buttons.

The final section shows the 'Question Text' tab. It has 'Add / Edit Question Text' and 'Clear Formatting' buttons. The text area contains 'What is your favorite sport to watch on TV?'. At the bottom are 'Save', 'Print Blank Form', 'Help', and 'Video' buttons. A red box highlights the 'Save' button, with a red arrow pointing from it towards the right side of the page.

If you wish, choose any format, layout or requirements for the question. You can format it for multiple (indent), make an answer required. You can also replace “explain” with a different word, examples— initial, sport, enter sport. Or assign the question to a gender in your database.

Add a question header if you wish. Add/edit question header and add the information into the question formatter. Again this serves as the introduction to the information below and not the actual question.

Select Question Text and Add/Edit Question Text to add the information to the actual question. Again this area does not have a character limit. Type your question, copy and paste from your other documents.

In the formatter SAVE FORMATTING DOES NOT mean SAVE QUESTION. Only that the text was saved. Be sure to use the SAVE BUTTON on the question screen.

Explain CTD:

When you have finished entering all of your question information make sure to save the question do make sure to save from the question screen. When you have successfully created your question you will see the green confirmation bar.

 The question was successfully added. ✕

Previewing the form:

Use the preview button to see how your form looks in real time. This will also show you how the athlete will see what you have added.

Form Name: Preview

Prev of 2

Section #: Question #: Question is Active?

Section Name:

Parent #:

What is your favorite sport to watch on TV?

P

Athlete Form ✕

* Items required to be filled out.

Question / Your Answer

Question Examples

What is a Concussion?

1:

A concussion is a brain injury that:

- Is caused by a bump, blow or jolt to the head or body
- can change the way a student's brain normally works.
- can occur during practices and/or contests of any sport
- can happen if if a studen has not lost consciousness
- can be serious even if a student has just been dinged or "had their bell rung"

Info on your TV habits.

Q 2: What is your favorite sport to watch on TV?

A 2:

Yes/No, Yes Only, No Only Questions:

The yes/no, yes only, no only questions are the most versatile questions ATS offers. With these questions, you have option to create dependent questions based on an answer. These are the “parent” questions which will be explained in greater details. These question types will display your question text, and the offer yes/no, yes, no to choose from.

Example— Have you ever had any of the following injuries. Concussion. Dislocations, etc.

Select Yes/No, Yes only, or NO only:

Add a Section Name if you choose. This optional and can be added to differentiate between sections of your form, Hand/Wrist/Arm vs Shoulder in a PPE.

If you wish, choose any format, layout or requirements for the question. You can format it for multiple (indent). With the yes or no questions you can have it highlighted on the athlete from report, trigger a sub-select (parent/child question). Or send a notice (automatic email) for a yes or no answer. Only display the question for a gender, make the question required to answer, and you can also have a explanation box show based on a yes/no answer instead of the parent style.

Add a question header if you wish. Add/edit question header and add the information into the question formatter. Again this serves as the introduction to the information below and not the actual question.

Question Definition	Question Header	Question Text				
Add / Edit Question Text	Clear Formatting					
Shoulder						
Save	New	Remove	Copy	Print Blank Form	Help	Video

In the question text enter the information you would like them to answer to yes/no, yes, no for.

Yes/No, Yes Only, No Only Question Example

Have you injured any of the following:

Q 3: Shoulder

A 3: Yes No

Parent/Sub-Question/Dependent Questions:

ATS allows you the ability to create Parent, Sub or Dependent questions. A Parent/Sub/Dependent question allows you to link a secondary or tertiary question to the “Parent” answer. If they answer “yes” to a question, *Depending*, on their answer follow up questions will display. If they answer no to that question, the follow up questions do not display.

These questions types only work with Yes/No, Yes Only, No Only question types.

- To set up the sub-select questions begin selecting the appropriate question type.
- On the INITIAL question, or the question with the Y/N, Y, N answer, be sure to select the “triggers sub-select” check box

The screenshot shows the 'Question Definition' tab with three sub-tabs: 'Question Definition', 'Question Header', and 'Question Text'. The 'Question Type' dropdown is set to 'Yes/No *'. In the 'Options' section, the 'Triggers sub-select' checkbox is checked and highlighted with a red box. Below it, the 'Show for value of' dropdown is highlighted with a green box and set to 'No'. A red arrow points from the 'Triggers sub-select' checkbox to the 'Show for value of' dropdown. A green arrow points from the 'Show for value of' dropdown to the text on the right.

Show for value of:

This box allows you to select the answer that will make the sub-select question display with. If you select no, then the when the athlete selects NO they the other question will be displayed; a yes answer bypasses. If you select YES, the follow up questions are displayed and a no answer bypasses.

After you have selected the components for your depenent question, you are ready to construct the content of your questions. The initial question where the conditions have been set, will contain the question you want answered yes/no to.

Once you have that done, be sure to SAVE, and then select new question.

The 'New Question' form has a title bar with 'New Question' and a 'Cancel New Question' button. It contains the following fields: 'Section #' with value '3', 'Question #' with value '4', and a checked 'Question is Active?' checkbox. The 'Section Name' field contains the text 'Yes/No, Yes Only, No Only Question Example'. The 'Parent #' field is currently blank.

The new question will display a blanked out Parent# option. This will change once you select the type of question you would like to utilize. The sub-selected question, or question after the Y/N, Y, N, question can be any of the other styles.

When you select the question type, you can then select the Question you want to this question to display for. In this example, you see a the only yes/no question available. This could be a large list, depending on the amount of yes/no question you have created. The list will always show you the question number as well a preview of the question text.

This will help prevent confusion if you need to reorder, number or change your form at a later date. This also will aid in correctly linking the forms, and not needing to remember the specific question number, you select the actual question.

Complete your question based on the type you select. Be sure to add question text and save.

Yes/No, Yes Only, No Only Question Example

Have you injured any of the following:

Q 3: Shoulder

A 3: Yes No

If you preview your form, you will notice that the only question displayed is the yes/no question.

Yes/No, Yes Only, No Only Question Example

Have you injured any of the following:

Q 3: Shoulder

A 3: Yes No

Q 4: Which shoulder did you injure?

A 4:

Left

Right

Both

If you select Yes, you will then see the sub-select question that is tied to the question.

If you select No, for this question the sub-select is bypassed because there was no injury to complete information for

Yes/No, Yes Only, No Only Question Example

Have you injured any of the following:

Q 3: Shoulder

A 3: Yes No

Important Notes

- * There are no limit to the number of sub questions that can be tied to a “Parent” question.
- * There is a limit of one tier of sub questions—meaning that one of your sub questions cannot have a sub question of its own.

Range and Formula Questions:

Range Questions allow you to construct a form, and have an athlete or staff member answer from the RANGE you have preset, 0-6, 6-11 etc. This could be used for a concussion daily check in sheet, or forms like that.

Formula Questions allow you to designate a question to Total the range questions.

Range Questions:

If you wish, choose any format, layout or requirements for the question. You can format it for multiple (indent), make an answer required although that is not recommended for note/info/title questions since there isn't anything they can answer. Or assign the question to a gender in your database.

This is also where you will assign the top and bottom of the number range you want to be filled in.

Add a question header if you wish. Add/edit question header and add the information into the question formatter. Again this serves as the introduction to the information below and not the actual question.

Select Question Text and Add/Edit Question Text to add the information to the actual question. Again this area does not have a character limit. Type your question, copy and paste from your other documents.

In the formatter SAVE FORMATTING DOES NOT mean SAVE QUESTION. Only that the text was saved. Be sure to use the SAVE BUTTON on the question screen.

The range questions will show with a box to enter the number that corresponds to the question.

Formula Questions:

Formula questions are used to calculate the range questions.

The Formula questions will only work in conjunction with the range questions. These will allow you to total, subtract and other math functions for the results of the answers that the athletes give.

The buttons here, allow you to modify your equation/formula. You can insert addition, subtraction, multiplication, division, parentheses, or to undo/delete what was added.

ADD Constant— allows you to add a number to the equation. If you needed to subtract, add or other aspects to calculate your total within the form. Maybe you want to subtract from the total 6. Use the ADD -, button and then put 6 in the box and then add constant. You will see that reflected in the formula box.

ADD Question— this will display all of the questions that are, Active and have answers required, and are marked as Range questions. For the questions to show up here, Answers must be required. Select the question from the dropdown and then click add question.

ADD Series— this allows you the ability to select multiple questions at one time to add into the formula

usual' + ' Sleeping less than usual' + ' Drowsiness' + ' Sensitivity to light' + ' Sensitivity to noise' + ' Irritability' + ' Sadness' + ' Nervous/Anxious' + ' Feeling more emotional' + ' Numbness or tingling' + ' Feeling slowed down' + ' Feeling like "in a fog"' + ' Difficulty concentrating' + ' Difficulty remembering' + ' Visual problems' + ' Other' - 6

Drop-Down Questions:

Drop-Down Questions allow you to ask a question in the Question Text, and supply the Athlete a list of choices in a drop-down list to pick from.

The screenshot shows the 'Question Definition' tab. On the left, the 'Question Type' dropdown is set to 'Drop-Down List'. The 'Options' section has 'Format as multiple for layout' unchecked. The 'Answer Requirements' section has 'Answer Required?' and 'Require explanation for answers?' both unchecked. The 'Question Gender' dropdown is empty. Below, the 'Drop-Down or Option Box value list' contains the text 'Monday,Tuesday,Wednesday,Thursday,Friday'. A yellow warning box states: 'All choices must be < 50 Characters. 300 Total Characters allowed.' At the bottom are buttons for 'Save', 'New', 'Remove', 'Copy', 'Print Blank Form', 'Help', and 'Video'.

If you wish, choose any format, layout or requirements for the question. You can format it for multiple (indent), or assign the question to a gender in your database.

The large box is where you enter the selections to create the drop-down list. Keep the selections to 50 characters or less, and 300 in total. Separate the selections by using a comma.

The screenshot shows the 'Question Header' tab. It features an 'Add / Edit Question Header' button and a 'Clear Formatting' button. Below is a large text area for the header. At the bottom left, a status bar shows '0 of 300 Total Characters allowed.' At the bottom are buttons for 'Save', 'New', 'Remove', 'Copy', 'Print Blank Form', 'Help', and 'Video'.

Add a question header if you wish. Add/edit question header and add the information into the question formatter. Again this serves as the introduction to the information below and not the actual question.

Select Question Text and Add/Edit Question Text to add the information to the actual question. Again this area does not have a character limit. Type your question, copy and paste from your other documents.

The screenshot shows the 'Question Text' tab. It features an 'Add / Edit Question Text' button and a 'Clear Formatting' button. The main text area contains the question: 'What day of the week is it? Please select from the list:'. At the bottom are buttons for 'Save', 'New', 'Remove', 'Copy', and 'Print B'.

In the formatter SAVE FORMATTING DOES NOT mean SAVE QUESTION. Only that the text was saved. Be sure to use the SAVE BUTTON on the question screen.

The screenshot shows a preview of the 'Drop-Down List' for question Q 6. The question text is 'What day of the week is it? Please select from the list:'. The answer area shows a dropdown menu with the following options: '--Select--', '--Select--', Monday, Tuesday, Wednesday, Thursday, and Friday. Navigation buttons for 'Prev' and 'Page' are visible on the left.

Option Box Questions:

Option Box Questions are multiple choice style question. You are able to ask a question in the question text and have options displayed. Option box questions are a single answer question type.

The screenshot shows the 'Question Definition' tab. On the left, a 'Question Type' dropdown menu is open, highlighting 'Option Boxes'. Other options include Note/Info/Title, Explain, Yes/No *, Yes Only *, No Only *, Range, Drop-Down List, Date, Fill In, Formula, and All-That-Apply. A note states '* Can be used for parent filter General Formula Help'. In the center, there are 'Options' and 'Answer Requirements' sections. The 'Options' section has a checkbox for 'Format as multiple for layout'. The 'Answer Requirements' section has checkboxes for 'Answer Required?' (checked) and 'Require explanation for answers?'. Below these is a 'Question Gender' dropdown menu. A large text area contains the text 'Monday, Tuesday, Wednesday, Thursday, Friday' under the label 'Drop-Down or Option Box value list (enter items separated by a comma)'. A yellow warning bar at the bottom of the text area says 'All choices must be < 50 Characters. 300 Total Characters allowed.' At the bottom of the screen are buttons for 'Save', 'New', 'Remove', 'Copy', 'Print Blank Form', 'Help', and 'Video'.

If you wish, choose any format, layout or requirements for the question. You can format it for multiple (indent), or assign the question to a gender in your database.

The large box is where you enter the selections to create the drop-down list. Keep the selections to 50 characters or less, and 300 in total. Separate the selections by using a comma.

The screenshot shows the 'Question Header' tab. At the top, there are tabs for 'Question Definition', 'Question Header', and 'Question Text'. Below the tabs are buttons for 'Add / Edit Question Header' and 'Clear Formatting'. The main area is a large text box containing the text 'Please answer the questions below marking your favorites.' At the bottom left, a yellow bar indicates '57 of 300 Total Characters allowed.' At the bottom of the screen are buttons for 'Save', 'New', 'Remove', 'Copy', 'Print Blank Form', 'Help', and 'Video'.

Add a question header if you wish. Add/edit question header and add the information into the question formatter. Again this serves as the introduction to the information below and not the actual question.

The screenshot shows the 'Question Text' tab. At the top, there are tabs for 'Question Definition', 'Question Header', and 'Question Text'. Below the tabs are buttons for 'Add / Edit Question Text' and 'Clear Formatting'. The main area is a large text box containing the text 'What is your favorite day of the week'. At the bottom of the screen are buttons for 'Save', 'New', 'Remove', 'Copy', 'Print Blank Form', 'Help', and 'Video'.

Select Question Text and Add/Edit Question Text to add the information to the actual question. Again this area does not have a character limit. Type your question, copy and paste from your other documents.

In the formatter SAVE FORMATTING DOES NOT mean SAVE QUESTION. Only that the text was saved. Be sure to use the SAVE BUTTON on the question screen.

The screenshot shows the rendered question. It has a title 'Option Boxes' and a header 'Please answer the questions below marking your favorites.' Below the header is the question 'Q 7: What is your favorite day of the week *'. Underneath is the label 'A 7:' followed by five radio button options: 'Monday', 'Tuesday', 'Wednesday', 'Thursday', and 'Friday'.

Date Questions:

Date questions allow you the ability to create questions that have a calendar to select a date from.

If you wish, choose any format, layout or requirements for the question. You can format it for multiple (indent), or assign the question to a gender in your database.

Add a question header if you wish. Add/edit question header and add the information into the question formatter. Again this serves as the introduction to the information below and not the actual question.

Select Question Text and Add/Edit Question Text to add the information to the actual question. Again this area does not have a character limit. Type your question, copy and paste from your other documents.

In the formatter SAVE FORMATTING DOES NOT mean SAVE QUESTION. Only that the text was saved. Be sure to use the SAVE BUTTON on the question screen.

Fill In Questions:

Fill in question types are similar to the Explain Questions, except these questions are designed to be a short answer response. Fill in questions answers are limited to 50 characters

Explain questions allow you to ask a question and have the athlete provide the answer to the question there. This could be a question that asks what their Primary Sport is, what their Student ID number is, or if they need to read an initial information.

If you wish, choose any format, layout or requirements for the question. You can format it for multiple (indent), make an answer required. You can also replace “explain” with a different word, examples— initial, sport, enter sport. Or assign the question to a gender in your database.

Add a question header if you wish. Add/edit question header and add the information into the question formatter. Again this serves as the introduction to the information below and not the actual question.

Select Question Text and Add/Edit Question Text to add the information to the actual question. Again this area does not have a character limit. Type your question, copy and paste from your other documents.

In the formatter SAVE FORMATTING DOES NOT mean SAVE QUESTION. Only that the text was saved. Be sure to use the SAVE BUTTON on the question screen.

All That Apply Questions:

All That Apply Questions can also be thought of as multiple choice & multiple mark questions. These could be utilized for any question where you would like to have more than one thing checked off. Symptoms of an illness, or symptoms an athlete is experiencing from an injury. These are similar to the option boxes, where you separate the choices by a comma.

The screenshot shows the 'Question Definition' tab. On the left, a 'Question Type' dropdown menu is open, with 'All-That-Apply' selected. Other options include Note/Info/Title, Explain, Yes/No, Yes Only, No Only, Range, Drop-Down List, Option Boxes, Date, Fill In, Formula, and All-That-Apply. To the right, there are sections for 'Options' (with a checkbox for 'Format as multiple for layout'), 'Answer Requirements' (with a checked checkbox for 'Answer Required?'), and 'Question Gender' (a dropdown menu). Below these is a text area for 'Drop-Down or Option Box value list (enter items separated by a comma)' containing the text 'Catching, Clicking, Popping, Grinding, Giving Out'. A yellow bar at the bottom indicates '250 Total Characters allowed.' At the very bottom, there are buttons for 'Save', 'New', 'Remove', 'Copy', 'Print Blank Form', 'Help', and 'Video'.

If you wish, choose any format, layout or requirements for the question. You can format it for multiple (indent), make an answer required, or filter the question by gender.

The screenshot shows the 'Question Header' tab. It features buttons for 'Add / Edit Question Header' and 'Clear Formatting'. The main area contains the text 'Please select all of the informaion on the questions that follow:'. A yellow bar at the bottom indicates '65 of 300 Total Characters allowed.' At the bottom, there are buttons for 'Save', 'New', 'Remove', 'Copy', and 'Print Blank Form'.

Add a question header if you wish. Add/edit question header and add the information into the question formatter. Again this serves as the introduction to the information below and not the actual question.

The screenshot shows the 'Question Text' tab. It features buttons for 'Add / Edit Question Text' and 'Clear Formatting'. The main area contains the text 'Do you have any of the following for your injury.'. At the bottom, there are buttons for 'Save', 'New', 'Remove', 'Copy', and 'Print'.

Select Question Text and Add/Edit Question Text to add the information to the actual question. Again this area does not have a character limit. Type your question, copy and paste from your other documents.

In the formatter SAVE FORMATTING DOES NOT mean SAVE QUESTION. Only that the text was saved. Be sure to use the SAVE BUTTON on the question screen.

This block shows the final question preview. A red arrow points from the 'Save' button in the previous screenshot to the 'Save' button in this one. The preview shows the question text and the list of options with checkboxes. The 'Save' button is highlighted with a red box.

All That Apply

Please select all of the informaion on the questions that follow:

Q 10: Do you have any of the following for your injury. *

A 10:

- Catching
- Clicking
- Popping
- Grinding
- Giving Out

Injury Forms:

ATS offers you the ability to link a form for the athlete's to fill out for an injury. If you wanted them to do a daily symptom check for their concussion, they can select that and then when they save, it will be tied directly to that injury. For this to work correctly, they will need to have an active injury, and you will need to also make sure the form is marked "Injury" in the name maintenance scree. Please refer back to [PG 4](#) to see where to mark that selection.

Create the form the way you would any other. You can choose any of the question types as shown previously.

Athlete Forms

Show Forms | Scroll Down | Scroll Up | Hide Instructions

Please choose a form name and click New to start a new form. Choose a form name and a date to view that existing form. Read all questions and click Yes/No, enter a range value or enter an explanation to those that apply. If you do not get a green check that says form saved, your form did not save.

Form Name: 18 Concussion Symptom Diary | Date: Select Date

New | Save

* Items required to be filled out.

Injury: -- Select Injury --

Question / Symptom: 12/27/2021 - Concussion - N/A - Head (Joe Tech Men Baseball)

Please choose a Severity Rating below: (0 being the least severe and 6 being the most severe)

Q 1: Headache *
A 1: [] 0 to 6

Q 2: Nausea *
A 2: [] 0 to 6

Q 3: Vomiting *
A 3: [] 0 to 6

When the athlete logs in, and selects the form they need to complete, they hit NEW and the Injury selection will become available. They can select the correct injury from the drop down and complete the form as they would during registration.

Injury - Davis, Crash

General Injury Info | Injury Desc/How | Athlete | Name: Davis, Crash | Status: Current

Body Part: Head | Injured: 12/27/2021 | Reported: 12/27/2021

Inj/Ill 1: Concussion | Rtn to Play: / / | Days: 0

2: | Resolved: / / | Days ### | Resolution:

3: |

Side: N/A | Happened during: | Athletic Trainer: Joe Streckfus

MOI: | Playing Surface: | Team: Joe Tech

SMOI: | Event Type/Name: |

Severity: | Surgery Required? [] on / / | Ins Status:

Default Concussion Injury | Do NOT bill for this injury [] Pr

Invoice Tracking | FM Evals | Cost Log | Covid-19

Modality | Rehab | Limitation | Concuss Evals | Referral | Service | Medication | Evaluations | Notes/Staff/Msg | eFiles | Strength | NCAA/

Date	Doc Type	Description
Yr: 2022		
1/5/2022	0	Athlete Form: Form Created - 18 Concussion Symptom Diary

Outcome Forms:

As patient centered outcomes become more of a focus with patient care, ATS allows you to mark a form as an “outcome” and then run a dataminer to pull those specific results. How to mark a form as outcome, please refer back to PG 3 or 4.

To build the outcomes form, make sure the form name is marked **outcome**, and then it is suggested to use a range/formula question types you can find those starting on PG 16.

Form Name: Mental Health Screening

Buttons: New, Save

* Items required to be filled out.

Question / Your Answer

Title and Information

1: New

Sports Anxiety

Many athletes get tense or nervous before or during games, number that says how you USUALLY feel before or while you

2: For the following questions ask yourself *Before or while*

It is hard to concentrate in the game.

Q 3: 1= Not At All
2= A Little Bit
3= Pretty Much
4= Very Much *

A 3: 1 to 4

Form Name: Creating Forms

Abbrev.: CreForm

Sort: 0

Is Active?

Parent See?

Athlete See?

Active From: mm/dd/yyyy Active To: mm/dd/yyyy Last Used: mm/dd/yyyy

Athlete Signature: Athlete Signature is optional

Parent Signature: Parent Signature is optional

Days before Form is Locked (default is 30): 30

Outcome Form?

ATS Data Miner

1 - Choose the export area

- Athlete Contact Manager Starter
- Athletes - Active
- Athletes - With Last Activity Dates
- Notes/Contact Data
- Vaccination Data
- Injuries
- Athlete Emer Contacts Duplicate IDs
- Limitations
- User Security Questions
- Modalities
- Athlete - Covid Entries List
- Medical Services
- Athlete - Covid Tests
- Athlete Login History
- Notes
- Referrals
- Rehabs
- Emergency Contacts
- Athlete - eFiles Uploads
- Injury - Last Activity
- Insurance - Athletes
- Injury Cost Log Entries
- Outcome Research - Athletes
- Outcome Research - Athletes- with name-dates
- Outcome Research - Staff

If you don't see the dataminer for outcome research, please contact ATS and we will be able to provide that.

2 - Select the data to be exported

- QuestionNumber
- PrimaryQuestion
- SecondaryQuestion
- QuestionOrder
- SectionOrder
- SubsectionOrder
- RangeAnswer
- FormName
- FormulaQuestion
- FormIndex
- UserID
- LastFirstName
- LName
- FName
- MName
- PhoneNumber
- Email
- CellNumber
- SportName
- DateCreated

Choose the appropriate information you would like to get out, and export it. You will then see the info in your excel spreadsheet and be able to manipulate/modify as needed.

For more info on the specifics of the data miner please review the [Data Miner](#) help doc.

Step 3—Creating the Paperwork List:

The paperwork list is an independent list/area in ATS, that allows you to link the forms that the athletes are completing to a list and have them automatically checked off as a completed entry in the athlete profile.

To build the list, in the **ATS Desktop** you need to go to Admin—> Maintenance—> Dropdown/Popup Lists —>Update Dropdown/Popup Lists. In the dropdown window look for the Paperwork Entry.

In the **ATS Staff Portal** go to Admin—> Dropdown/Popup Lists and Select Paperwork from the dropdown list.

Paperwork vs Paperwork 1time Lists:

How do you decide where to put your paperwork items? The regular list or 1 time paperwork list?

The Regular **Paperwork List** is the same list that has been in ATS. Our recommendations for this list will be any form or paperwork that you are going to want to collect on an regular basis needs to be created here.

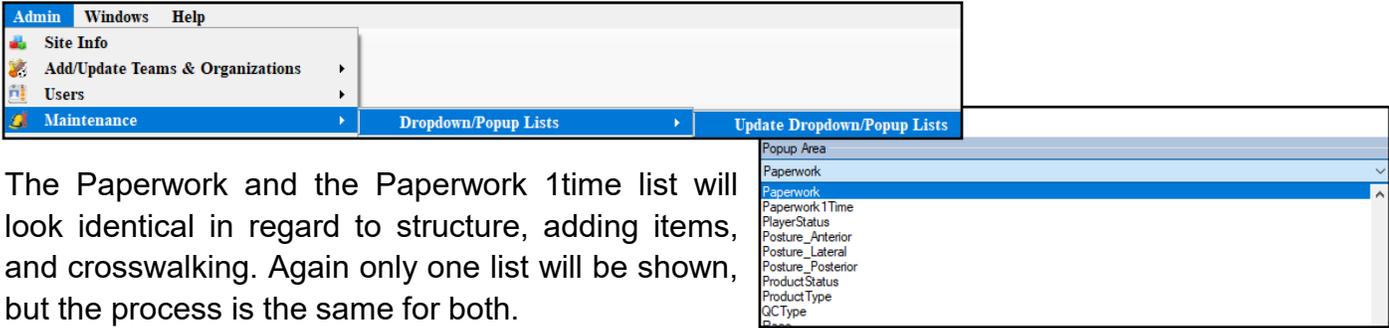
Paperwork 1 Time list: this item was added to ATS to supplement the regular list. We designed the paperwork 1 time for paperwork items you may only collect 1 time— Sickle Cell information, Incoming Medical History, or any other form that you need to have collected and don't want to run the risk of clearing the entry when you run the “clear paperwork flag” process for year end cleanup.

The image contains two screenshots of the ATS interface. The left screenshot shows the Desktop version with the menu path: Admin > Maintenance > Dropdown/Popup Lists > Update Dropdown/Popup Lists. A dropdown menu is open under 'Update Dropdown/Popup Lists', showing a list of items including 'Paperwork', 'Paperwork 1 Time', 'PlayerStatus', 'Posture_Anterior', 'Posture_Lateral', 'Posture_Posterior', 'ProductStatus', 'ProductType', and 'QCType'. The right screenshot shows the Staff Portal version with the menu path: Admin > Org-Team-Users > Dropdown/Popup Lists. A dropdown menu is open under 'Dropdown/Popup Lists', showing a list of items including 'Pain_Anterior', 'Pain_BowelBladder', 'Pain_Duration', 'Pain_Exacerbates', 'Pain_Intensity', 'Pain_Location', 'Pain_Nature', 'Pain_Night', 'Pain_Parasthesia', 'Pain_PM', 'Pain_Weakness', 'PainIntensityLevel', 'Paperwork', 'Paperwork1Time', 'PlayerStatus', 'Posture_Anterior', and 'Posture_Lateral'. A large yellow 'OR' is placed between the two screenshots.

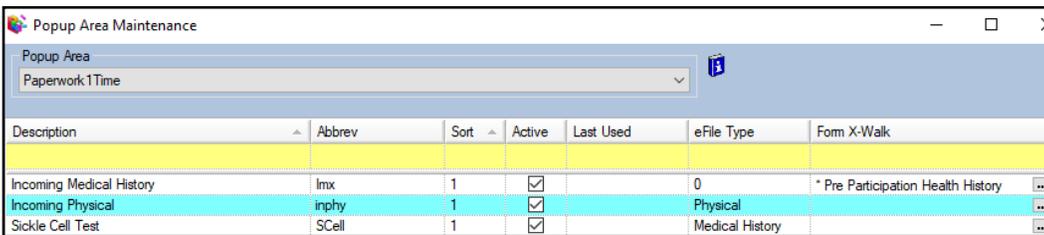
Select from the list which list you want to create. The process of adding, and linking to the athlete forms is the same between the lists, and will only be shown for one list.

Paperwork List in the Desktop:

Begin building the paperwork list(s) in the ATS Desktop by going to Admin—> Maintenance—> Dropdown/ Popup Lists—>Update Dropdown/Popup lists. Find Paperwork or the Paperwork 1time in the dropdown menu.



The Paperwork and the Paperwork 1time list will look identical in regard to structure, adding items, and crosswalking. Again only one list will be shown, but the process is the same for both.



The required fields to save either the paperwork or paperwork1time list are a description, abbreviation, sort number and making it active. You do need to save paperwork list prior to crosswalking. eFile Type and Form X-Walk are optional and are explained below.

eFile Type vs. Form X-walk which should I choose?

— you are not able to utilize both an eFile and Form to tie to a paperwork item at the same time.

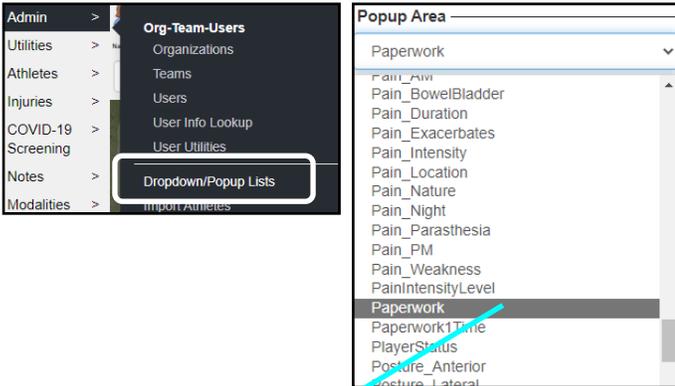
eFile Type— this option is a dropdown that allows you to link your preset file types for the athletes to load something to. This could be their incoming physical if they get it off site, proof of their sickle cell information. So if you have an athlete load a document, they select that file type, it is then linked to that paperwork item and it will check off that it was submitted on the paperwork list.

Form X-Walk— this option uses the or ellipsis to select from your constructed Athlete Forms. When your athletes log into the ATS Athlete Portal, they can complete the forms you have made for them, these will be automatically check off as submitted on the paperwork list. You are able to select multiple forms to tie to a paperwork item (use the control button or shift buttons to select multiples).

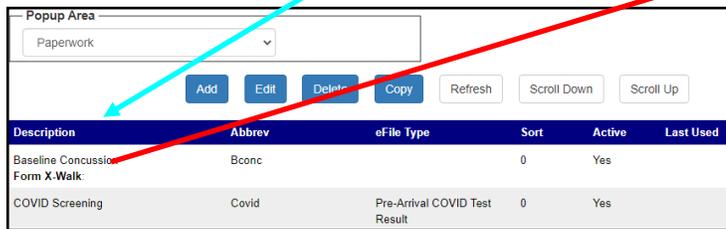
Be sure to save your linking from the eFile or X-Walk process. You will see a message when you save that you need to go to run the Form Verification. That is covered on a separate page.

Paperwork List in the Staff Portal:

Begin building the paperwork list(s) in the ATS Staff Portal by going to Admin—> Maintenance—> Dropdown/ Popup Lists. Find Paperwork or the Paperwork 1time in the dropdown menu.



The Paperwork and the Paperwork 1time list will look identical in regard to structure, adding items, and crosswalking. Again only one list will be shown, but the process is the same for both.



The image shows the 'Change Paperwork Item' form. It has the following fields:

- Description: Baseline Concussion
- Abbrev.: Boonc
- Sort: 0
- Is Active?:
- Last Used: mm/dd/yyyy
- eFile Type: (dropdown menu)

Below the fields is a blue informational box: "IF you are doing crosswalk forms the 'eFile Type' must be different for each paperwork item to avoid multiple entries getting 'Checked' at the same time." Below that is a list of file types: 18 Concussion Symptom Diary, 29 Medical Consent, CES-D Mental Health updated, NCAA Concuss Sheet with links (46), Pre Participation Health History, Student Athlete Annual Income Form, Student-Athlete Authorization for Release of Information, ADD and Concussion Disclosure ccny, Assumption of Risk ccny, HIPAA, Insurance Acknowledgement-ccny. At the bottom are 'Save' and 'Cancel' buttons.

The required fields to save either the paperwork or paperwork1time list are a description, abbreviation, sort number and making it active. eFile Type and Form X-Walk are optional and are explained below.

eFile Type vs. Form X-walk which should I choose?

— you are not able to utilize both an eFile and Form to tie to a paperwork item at the same time.

eFile Type— this option is a dropdown that allows you to link your preset file types for the athletes to load something to. This could be their incoming physical if they get it off site, proof of their sickle cell information. So if you have an athlete load a document, they select that file type, it is then linked to that paperwork item and it will check off that it was submitted on the paperwork list.

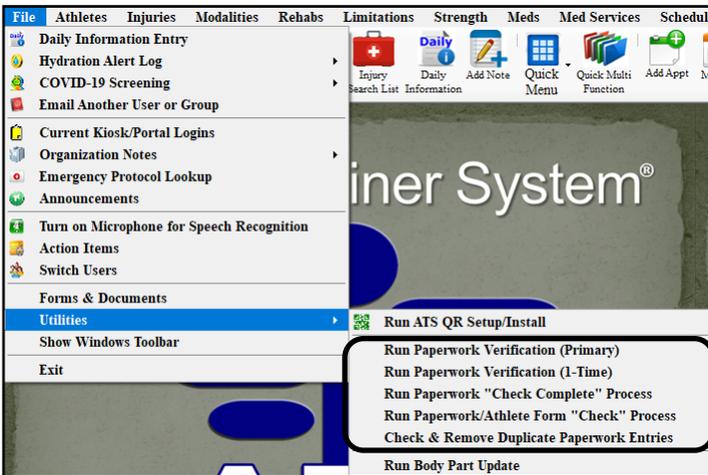
Form X-Walk— this option allows you to select from your constructed Athlete Forms in the list.. When your athletes log into the ATS Athlete Portal, they can complete the forms you have made for them, these will the automatically check off as submitted on the paperwork list. You are able to select multiple forms to tie to a paperwork item (use the control button or shift buttons to select multiples).

Be sure to save your linking from the eFile or X-Walk process. You will see a message when you save that you need to go to run the Form Verification. That is covered on a separate page.

Building the Paperwork List (Verification) in Athlete Profiles:

After you create the paperwork list in the dropdown menu, now must insert/create it in the your athlete profiles. If you do not do this step, you will not see the either the paperwork or paperwork 1time in the athlete profile. This process is currently only available in the ATS Desktop.

There are two(2) processes that need to be done to ensure the process works correctly. The Paperwork Verification, Paperwork Check Complete. There is a third option the Paperwork Check process that is a “back in time process”. This is found under the File Menu—> Utilities. Then select the Primary(yearly) Paperwork or the 1 time Paperwork. Depending on the amount of athletes in your system, or amount of paperwork these processes could take a substantial amount of time; please be patient and allow to complete.



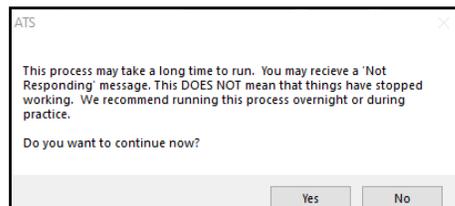
1. Verification— builds the respective paperwork list in the athlete profile, and will check them off when completed, if you X-walk them. Also allows you to utilize the Paperwork Report, to check for completing of incoming paperwork. The paperwork report will only generates information based off of the paperwork list being created and the verification being ran.

2. Check Complete— will check off the paperwork complete flag in the athlete profile. After an athlete has submitted all of their required paperwork, if you have ran the check complete, they will then get a check mark in the box. Also shows on other associated screens.

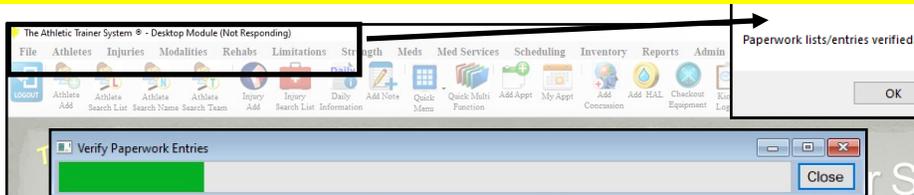
3. Check process— will go “Back In Time” looking for submitted paperwork and then check it off. This goes back and looks for completed paperwork, before the verification and the check complete processes may have been ran.

When you run the verification, check process, or check complete processes, they have the possibility of taking a long time. This is recommended to be done at the end of the day, practice times, or over a time frame when you will not need access to your Desktop module.

After selecting one of the processes, you will see this screen.



After selecting yes, your database becomes very busy. This does not mean that the program has stopped working, but means it is individually going through all of your athletes, one by one, form by form and inserting the item name into the paperwork list. The more athletes you have, the longer it will take. That’s why we encourage the inactive times, for these to be completed. If you stop ATS, before it completes the process, your lists will be inaccurate and will have to be ran again.



If you don't see a box like the one here, your list was not successfully built, or the process was interrupted. ***If you notice that your paperwork lists are inaccurate, please rerun the process.***

Paperwork Complete:

Completing the steps on the previous page, Paperwork Verification, Check and Check Complete; gives you the opportunity to see the lists you have built in the athlete profile. Use whichever screen you like the most for verifying paperwork entries, but we recommend the Quick Multi-Function in the desktop or the Athletes Multi-Function in the Staff Portal.

The screenshots illustrate the navigation path to the 'Quick Multi-Function' tool. The first image shows the 'Athletes' menu with 'Quick Multi-Function' selected. The second image shows the dropdown menu options, with 'Athletes Multi-Function' highlighted. The third image is a detailed view of the 'Quick Multi-Function' window, showing a table of athletes and a 'Paperwork Complete' section with columns for 'Submitted', 'Submit Date', and 'Verified'.

Athlete	Year	Team	Player Position	Cleared	PPWK	CCC	Birthdate	Gender	Email
Bonder, Martin	Sophomore	Men Sent by ATS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5/1/1988	Male	
Boyd, Blake	Junior	Men Sent by ATS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7/4/1996	PNF	
Brewster, Nick	Junior	Men Sent by ATS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7/4/1990	Male	
Brown, Barry	Sophomore	Joe Tech Men Baseball		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7/14/2000	Male	joeth@athletictrainsys...
Calderon, Stephan	Junior	Men Sent by ATS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11/16/1993	Male	
Campbell, Julius	Junior	Joe Tech Men Football		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9/15/2001	Male	
Case, Thomas J	Freshman	Men Sent by ATS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10/26/1982	Male	
Clark, Billy	Grad 2023	Joe Tech Men Baseball		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5/19/1998	Male	joeth@kefferdev.com
Cutty, Robert	Freshman	Men Sent by ATS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10/1/2000	Male	
Davis, Aaron	Junior	Men Sent by ATS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5/1/1988	Male	
Davis, Ansley	Junior	Men Sent by ATS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5/1/1988	Male	
Davis, Brent	Junior	Men Sent by ATS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5/1/1988	Male	
Davis, Crash	Senior	Joe Tech Men Baseball		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1/14/1998	Male	joeth@kefferdevelope...
Davis, Crashyy	Senior	Joe Tech Men Baseball		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1/14/1998	Male	joeth@kefferdevelope...
Davis, Donnel	Junior	Men Sent by ATS		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5/1/1988	Male	joeth@kefferdevelope...

Paperwork...	Submitted	Submit Date	Verified	Comment	Paperwork Complete	Cleared
Baseline Concussion	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
COVID Screening	<input checked="" type="checkbox"/>	12/7/2022	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Insurance Card Back	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Insurance Card Front	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Participation Form	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Running the process on PG 32, lets you see that the paperwork if paperwork was submitted (check mark in the submit column) and the date it was submitted. The verified column is for you/your staff to mark that you have reviewed the document and you can add a comment to it if you would like. To view the completed paperwork select the Athlete Forms tab.

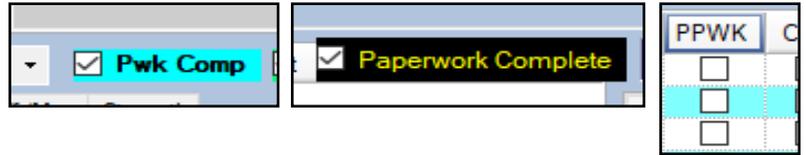
Date Created	Form Name	Printed
<input type="checkbox"/> 12/7/2022 10:00:02 AM	Concussion Symptom Diary (18)	<input type="checkbox"/>
<input type="checkbox"/> 12/7/2022 9:58:50 AM	Concussion Symptom Diary (18)	<input type="checkbox"/>
<input type="checkbox"/> 12/7/2022 9:57:54 AM	Concussion Symptom Diary (18)	<input type="checkbox"/>
<input type="checkbox"/> 12/7/2022 9:36:44 AM	10313	<input type="checkbox"/>
<input type="checkbox"/> 12/7/2022 9:35:00 AM	10313	<input type="checkbox"/>
<input type="checkbox"/> 11/4/2022 8:43:39 AM	10313	<input type="checkbox"/>

To view the forms, select the form you need to review, put a check mark beside the form(s) and then click the Print/View Form(s) button. They will open in the report viewer; see the page for [Interacting with Forms](#) to see the ways you can interact withing the report viewer.

Paperwork Complete:

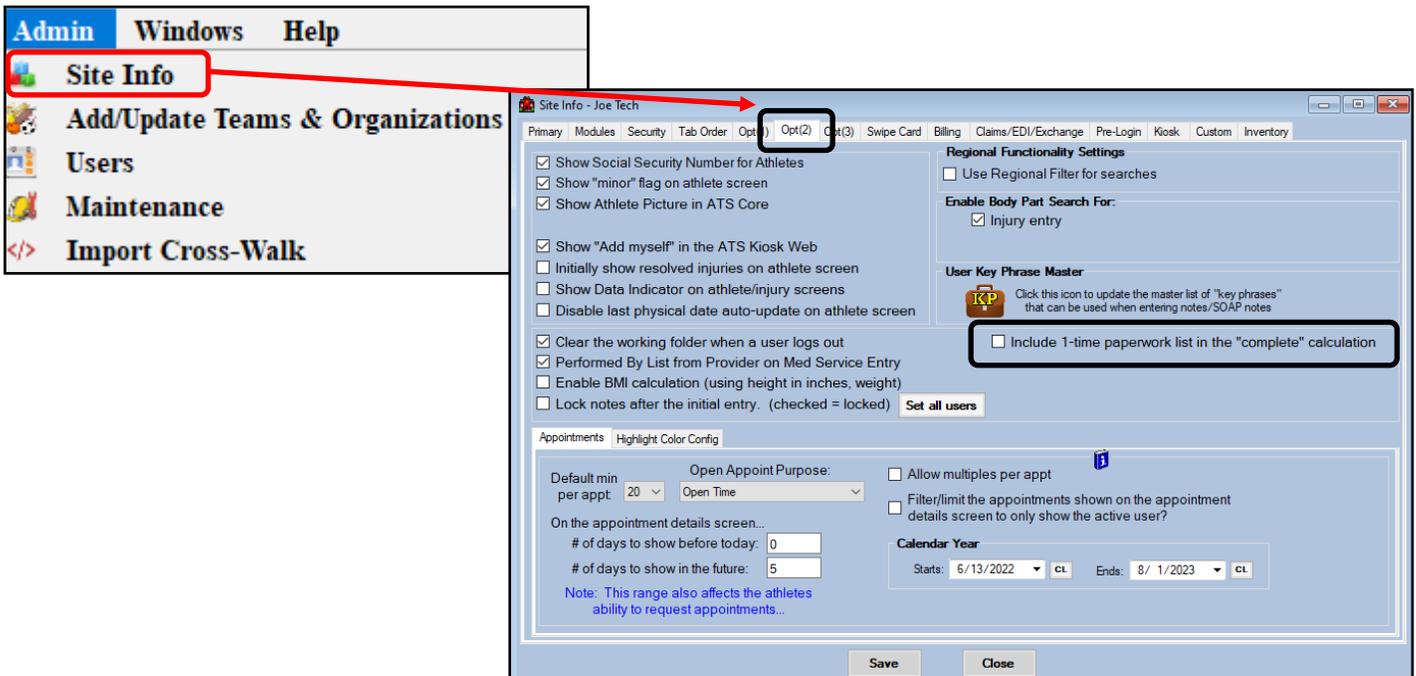
Paperwork Complete Check Box

When you complete the steps on [pg 32](#), that enables the paperwork complete check box to automatically check off, when the athlete submits all of their required paperwork.



If you are going to utilize the 1-time paperwork, and want those submission to effect the paperwork list, you need to complete the steps below. Otherwise, the paperwork list will only “look for” the primary list submissions when checking off the PPWK complete check box.

To enable ATS to look at both the Primary and the 1-time paperwork list, to “check off” the paperwork complete box, you need to go to the Admin tab—> Site Info—> Opt(2).



To group the paperwork lists into one complete box, put a check mark in the box beside the ‘Include 1-time paperwork list in the “complete” calculation’. After you do this, both lists will affect the check mark.

Reports for Athlete Forms:

There are many different reports that allow you the ability to see the individual forms, as well as see what forms have been submitted if you have gone through the paperwork linking that is outlined on [Pg 32](#)

<ul style="list-style-type: none"> 1. Team Reports 2. Athlete Reports 3. Coaches Reports 4. Injury Reports 5. Rehab Reports 6. Modality Reports 7. Rehab/Modality Reports 8. Strength & Conditioning Reports 9. Limitation Reports 10. Service Reports 11. Concussion Eval Reports 12. Referral Reports 13. Medication Reports 14. Note Reports 15. Athlete Form Reports 16. Staff Form Reports 17. Charts & Graphs 19. Scheduling 20. Inventory & Equipment Reports 21. Order Reports 22. COVID-19 Screening 23. Mailing Labels 24. General Reports 26. HAL Reports 	<p>Athlete form reports: will show you complete entries, and give you ways of generating the information that you need.</p> <p>There are several sub-menu items as well</p>	<p>15. Athlete Form Reports ▾</p> <p>For Yes/No Questions</p> <ol style="list-style-type: none"> 1. Results for Form... 2. Results by Gender... 3. Results by Team and Gender... 4. Results by Season and Gender... <p>-----</p> <p>5. For Athletes... ▾</p> <ol style="list-style-type: none"> 6. Completed Forms for Team... 7. Print a Blank Form... 9. Mental Health - PHQ-9 Results ▾
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OR

The **Paperwork Report:** will generate a list of paperwork entries for each person in your system. Especially helpful for looking at preseason paperwork completion.

<ul style="list-style-type: none"> 1. Team Reports 2. Athlete Reports 3. Coaches Reports 4. Injury Reports 5. Rehab Reports 6. Modality Reports 7. Rehab/Modality Reports 8. Strength & Conditioning Reports 9. Limitation Reports 10. Service Reports 	<ul style="list-style-type: none"> 1. Athlete Details 2. Personal Information (Quick List) 3. Athlete Phone Book 4. Medical History Summary 5. Medical History Grouped by Injury 6. Surgery History 7. Athlete "Year" Count 8. Athlete "Year" Roster 9. Paperwork Report 	<p>3. Coaches ▾</p> <ol style="list-style-type: none"> 1. Team Roster 2. Team Phone Numbers and Emails 3. Team Details Information 4. Limitations ▾ 5. Limitations & Injuries ▾ 6. Paperwork List 7. Paperwork Table List 8. Last Physical and Drug Test List 9. Cleared to Play 10. Academic Eligibility 11. Coach Team Roster ▾
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OR

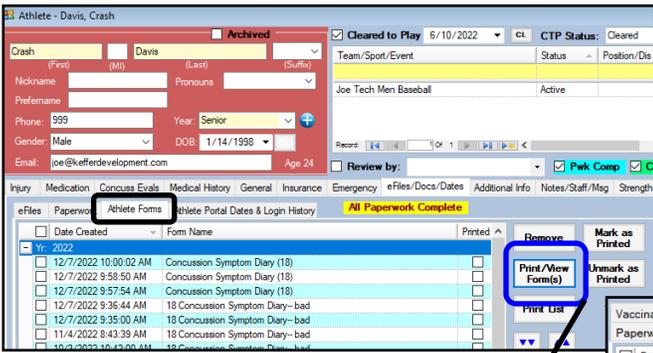
In addition to the reports you can generate; you also have the option to set up the "Batch Reports". These are automatic reports the system generates and can email to whomever you select, that has an ATS account. Useful for emailing coaches reports of preseason paperwork that has been completed, and not having to generate and send the report yourself. ATS generates the report and emails it for you at the time you choose. For more info/setup please see the [Batch Report](#) Help doc.

After you have completed your forms, and you notice that there is a continuity issue, or you would like to rearrange questions. You may find it easier to utilize the Update Athlete Form Structure utility. It allows you to see the question number, section, as well as sub-section numbers in one screen and manipulate how you see fit. For more information see the [Update Athlete Form Structure](#) help doc.

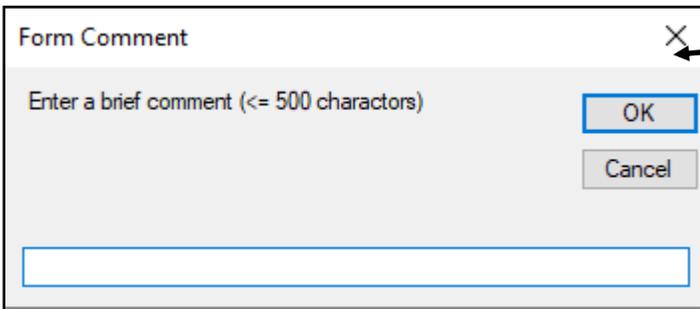
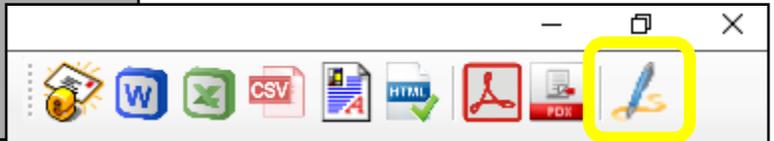
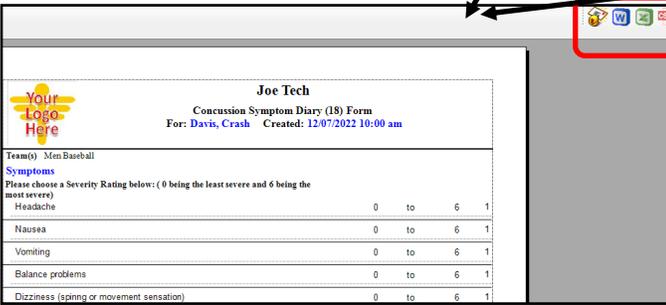
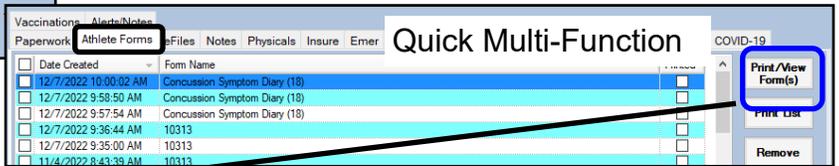
Interacting with Athlete Specific Forms:

After an athlete form(s) have been submitted, there is a way for you or the staff to review and digitally sign the form(s).

The way to review and sign the forms is to either select the athlete individually and go to their Athlete Forms tab. The other way is to utilize the Quick Multi-Function and the Athlete Forms tab. Accessing this way, allows you to sign that athlete form with the report viewer because it is tied directly to the athlete.



Select the form(s) you need to review, and then select the Print/View form button. This will generate the form in the report viewer.



You will see this message after you enter your comment and click ok. The system will then create a second eFile copy of the form with your signature attached to it.



Enter a comment for the form(s) you are reviewing. Up to 500 characters including spaces.

The eFile copy that is created after you signed the form will show in the athlete eFile area. Again, this creates a new copy, does not change the original eFile copy of their form; for historical reasons. This second copy will also tell you what the form is, and when it was signed. To review the comments on the form open/view the form.

Vaccinations	Alerts/Notes		
Paperwork	Athlete Forms	eFiles	Notes Physicals Insure Emer Concuss Team General Acad Elig
<input type="checkbox"/>	Date	Doc Type	Description
- Yr: 2022			
- M: December			
<input type="checkbox"/>	12/14/2022	0	Form reviewed and signed on 12/14/2022 11:41:39 AM

Numness or tingling	0	to	6	1
Feeling slowed down	0	to	6	1
Feeling like "in a fog"	0	to	6	1
Difficulty concentrating	0	to	6	1
Difficulty remembering	0	to	6	1
PrePart_AthleteMultiple.rpt 12/14/2022	Concussion Symptom Diary (18)			12/14/2022 11:41:38AM

Team(s) Men Baseball

Concussion Symptom Diary (18) Form for: **Davis, Crash** Created: **12/07/2022**

Visual problems	0	to	6	1
Other	0	to	6	1
Total				18

Signed:

Reviewed by: Joe Streckfus
14-Dec-2022 11:41 am
I have reviewed this form and no action is needed.



The reviewed by name, date/time and comments will be entered at the bottom of the last page of the document.

If you have established a signature within your user profile, it will also be inserted when you sign. For more info on adding a signature to your account please see the [User Set up](#) document.