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Setting Up New Staff Accounts:

This doc will give you information on adding or editing accounts for your athletic trainers. It will show you all of the components of the user screen and what they are used for.

Add a User:

To add or edit the user accounts, begin by going to the Admin tab—> and Selecting Users.

To add a user navigate to the sub-menu and select Add a User.

Editing a user:

To edit select on the sub-menu either search users...

Active only- this will display your current, active accounts.

Search all Users(active & inactive) will display all the current and former (disabled) accounts

Multi User Update— allows you to see your active accounts and edit them at one time

Admin Windows Help		
💑 Site Info		
👸 🛛 Add/Update Teams & Organizations	- F	
🔨 Users	•	Add a User
💢 Maintenance	•	Search UsersActive Only
Import Cross-Walk	•	Search All Users (Active & Inactive)
Dashboard Statistics>	•	Multi User Update
🚰 Data Miner		My User
Injury Analytics Reporting		Copy User

3 User	
Information	Security
Name: new	Teams Modules Email/Opt Partial Admin Secure Msg Notes MSC Forms Docs/Bill Cert
(First Last) Administrator Athletic Trainer PRN Staff	
Coach Doc/Phy/Nurse Other	
Student Strength/Condition	Coed Guest Team
	Men Sent by ATS
User ID: new Password:	
Disabled On-> / / 👻 Reset 🚺 📝 🐈 💶 関	Guest demo
Supervisor:	
	- Joe Tech
Email Addr:	Coed Behavioral Health
Text Addr:	Coed Nutrition
	Coed Track
Title:	Men Football
License #: NPI #:	Men Football
See/set private info Force password change on next login	Women Softball
Use secure messages	Women Womens Basketball
	- Joe U East
Phone/Location Email Signature Home Address Reset Login Info	Coed Power Walking
Phone: () Office: ()	Coed Underwater Basketweaving
Cell: () · Fax: () ·	- Joe U North
Location:	Men Lacrosse
Signature Generate Upload Clear	
Signature Generate Upload Clear	
	Select All Unselect All Expand All Collapse All Region
	Select All Unselect All Expand All Collapse All Region
	Actions
	Search Reset User Disable User New Remove Save Close

There are two parts of the user screen; general user information on the left, and specific settings and other information on the right.

Explanation of User Information Screen:

😫 User		
- Informatio	ņ	
Name:	new	
(First Last)	Administrator Athletic Train	ner 🔄 PRN Staff 🔋
l li	Coach Doc/Phy/Nu	irse 🗌 Other
	Student Strength/Co	ndition

Name: Enter the Staff Member (User) full name.

Check boxes: Designate the users status in the system.

Administrator does not mean school administrator, but it means ATS administrator. Checking that box allows the person to have full access to your database.

TOP

User ID:	new	Password:
Disabled On-	> / / • • F	Reset Й 📝 🖶 CL 関

Supervisor:

Email Addr:

Text Addr:

License #:

Title:

User ID: The id your user will use to log into the system with.

Password: Unique password for the user, use the Plus sign to add a password; must be a strong password.

Disable on: tells you the last day the user could access the system. Use the Reset button to clear that date to reenable their account.

Supervisor: allows you to select the supervising AT for the user. Useful for supervisor summary reports.

Email Addr: A required entry, used by the system to send emails, also to double check there are no duplicate profiles.

This icon allows you to send the user you are creating their ID, Password and a link for new user training.

Text Addr: enter a text address to receive text from ATS.



This icon helps with the text address links. To send a text from ATS you must include the text address located here.

Title: Users title

License #: enter the users state license number

NPI #: allows you to store your NPI in the system, also used for the ATS Data Exchange.

 See/set private info
 ✓ Force password change on next login

 Use secure messages

See/Set Private Info: allows the user access to private information. See the <u>Private Info</u> Doc for more information.

Use Secure Messages: Allows the user access to send/ receive secure messages in ATS. See <u>Secure Message</u> doc for more info

Force Password change on next login: make the user change their password the next time the login to ATS. This must be done by the user, changing it administratively will not clear the check mark.

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	S

NPI#:

Explanation of User Information Screen:

Phone/Location	Email Signature	Home Address	Reset Login Info
Phone:)	Office:	
Cell:)	Fax:	
Location:			
Signature	Generate	Upload	Clear

Phone/Location Email Signature Home Address
Enter email signature to use:

Phone/Location	Email Signature	Home Address	
) D
Emergency (Contact		
Name:			
Phone:	<u></u>	Cell:	_
Email Addr:			
Relationship:			
Additional:			0
			Y
Phone/Location	Email Signature	Home Address	Reset Login Info
Phone/Location Question #1:	Email Signature	Home Address	Reset Login Info
_	Email Signature	Home Address	Reset Login Info
Question #1:	Email Signature	Home Address	Reset Login Info
Question #1:	Email Signature	Home Address	Reset Login Info ~
Question #1: Answer #1:	Email Signature	Home Address	Reset Login Info ~ ~
Question #1: Answer #1: Question #2: Answer #2:	Email Signature	Home Address	Reset Login Info ~ ~ ~
Question #1: Answer #1: Question #2:	Email Signature	Home Address	Reset Login Info
Question #1: Answer #1: Question #2: Answer #2:	Email Signature	Home Address	Reset Login Info

Phone/Location: enter contact information, and your normal location(facility)

Signature: This area is used to digitally sign documents, and other information in ATS. Also used on some secondary insurance claims. Generate will have ATS generate a signature for you, upload allows you to load a signature you have scanned.

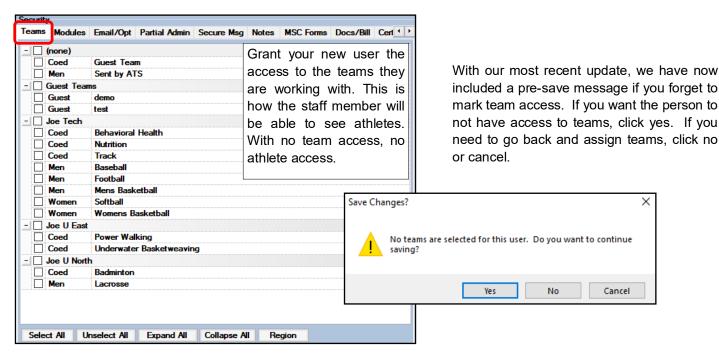
Email Signature: Allows you to add a signature for any email you send from ATS.

Home Address: Gives you a place to store your emergency contact information.

Reset Login Info: Allows you to select from the list of questions provided and provide answers. This allows you the ability to unlock your disabled account should you forget your password and try too many times. For more information on the process, please see the <u>Rest Process</u> help doc.

User Setup— Team Tab:

ATS has many different layers of security. Team access is the first layer; by default all new profiles have no access to anything. This is to keep accounts secure by not granting wrong access to a new user.



User Setup- Modules Tab:

ATS has many different layers of security; Module Access is the next layer. Modules grant specific permissions to aspects of ATS. There are 4 levels of access— None(no access to that component), Read-Only(view information only), Read-Write(view and edit information), Add-Only(add information only, no ability to view information). To assign permissions, either use the dropdowns to assign individually, or use the buttons oat the bottom to assign all modules the same access. You also have the option to copy module access from a user you have already created.

If you do not assign any module access, the staff person will not be able to view any information related to the athletes.

With our most recent update, we have now included a pre-save message if you forget assign module access. If you want the person to not have access to modules, click yes. If you need to go back and assign modules, click no or cancel.

Save Changes?	×
No security modules are selected for this user. Do you want to continue saving?	
Yes No Cancel	

Security	
Teams Modules Email/Opt Partial Admin Secure Msg	Notes MSC Forms Docs/Bill Cert
 No Report Access Allowed to Submit/Pr ✓ Allow Report Printing ✓ Allow Report Exporting On the Athlete Details 	<u> </u>
Module	Access
Activity Tracking	None
Announcements	None
Athlete Forms	Ivone
Athlete Screen	None
Athlete Screening	None
Billing	Read-Only Read-Write
Concussion	Add-Only
Distribute Medication	None
Documents	Nana
Emergency Contacts	None
Evaluations	None
Evaluations - Additional Findings	None
Evaluations - Evaluations	None
Evaluations - Girth	None
Evaluations - Medical History	None
Evaluations - Objective	None
Evaluations - Pain	None
Evaluations - Physician Notes	None
Record: 4 4 0f 78	
Read/Write Read Only Add Only None	From Another User Reset

User Setup— Email Groups:

The Email Groups tab, allows you the ability to send automated emails to a group of users assigned. This can be used for any of the automated emails you can set up in <u>Site Info</u>.

Assign teams you need/want notifications for. For coaches or user that do not need access to all teams, you can use the From Security button at the top to copy over the email team access from the Team Security access you set previously.

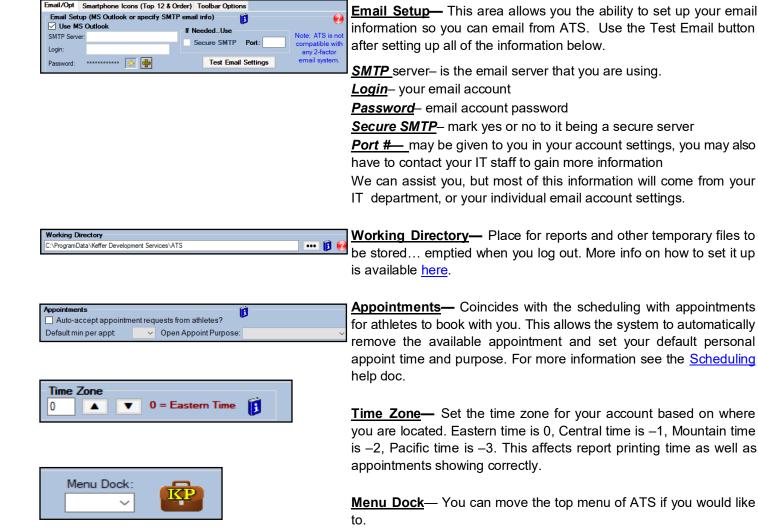
	a dhia ana	er in group em	ile fam lit			From Sec	-
		er in group em	alis for: D			Thom Sec	un
	(none)						
	Coed	Guest Team					
	Men	Sent by ATS					
	Guest Tea						
	Guest	demo					
	Guest	test					
	Joe Tech						
	Coed	Behavioral He	alth				
	Coed	Nutrition					
	Coed	Track					
	Men	Baseball					
	Men	Football					
	Men	Mens Basketb	all				
	Women	Softball					
	Women	Womens Bask	etball				
- 🗆 -	Joe U East	1					
	Coed	Power Walkin					
	Coed	Underwater B	asketweavir	ng			
- 🗆 .	Joe U Nort	h					
	Coed	Badminton					
	Men	Lacrosse					

User Setup— Email/Opt:

The Email/Opt tab has many things that you are able customize and set up for each of the users in your database. This is were the email settings need to be set up for each user and other useful options upon login. You are also able to set the smartphone icons and other toolbar options here.

Teams Modules Email Groups Email/Opt	Partial Admin Secure Msg Notes MSC Forms			
Email/Opt Smartphone Icons (Top 12 & O	rder) Toolbar Options			
Email Setup (MS Outlook or specify SMTF Use MS Outlook SMTP Server: Login:	If Needed. Use Note: ATS is not compatible with any 2-factor			
Password: Working Directory C:\ProgramData\Keffer Development Services\AT	Test Email Settings email system.			
Appointments Auto-accept appointment requests fr Default min per appt Oper	rom athletes?			
Time Zone 0 • • 0 = Eastern Time	Menu Dock:			
On Login Show new injuries entered notice during login Show expiring insurance notice on login Show expiring physical notice on login Show daily info screen on login Show injury updates needed on login				
Show team(s) on login O All O 1-	Choose Show			
Actions				
Search Reset User Disable User	r New Remove Save Close			

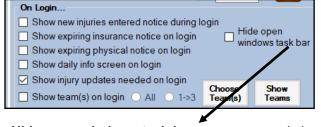
User Setup— Email/Opt Explained:



<u>KP</u>— Allows you to create your own Key Phrase, use a word and it will insert the full text so you don't have to. Check out the <u>Key</u> <u>Phrase</u> help doc for more information on making and how to use them.

<u>On Login</u>— Allows you to set things you would like to show up for the user when the login to ATS.

- New Injuries shows injuries that were entered into the system.
- Expiring ins if you have expiration dates for ins it will take you to the athletes.
- Expiring Physicals will take you to the athletes with expiring physicals
- Show Daily info screen- loads the daily info screen automatically
- Injury Updates needed displays the injury update needed screen automatically for the user
- Show Teams– allows you to show the "team" search list for all the teams the user has access or between1-3 teams. Use the buttons to choose or see availability.



<u>Hide open windows task bar</u>— you can maximize the screen space by hiding the blue bar on the side of ATS using this check box.

User Setup— Email/Opt Explained:

Smart Phone Icons:

The Smart Phone icon tab in the Email/Opt area give you the ability to set your preferred top 12 icons when you login to the smartphone link.

Email/Opt Smartphone Icons (Top 12 & Order) Toolbar Options Use the drop-down lists below to choose the icons for the smartphone. This process will also set the icon order, so your most often used icons can be 1st, etc. Icon 1: View Athlete Info Icon 1: View Athlete Info Icon 2: Add Note Icon 2: Add Note Icon 3: Injury Plus Icon 5: Add Modality Icon 5: Add Rehab Icon 7: Icon 8: Team Roster Icon 10: Send Email/Text <td< th=""><th>Teams Modules</th><th>Email Groups Email/Opt Partial Adm</th><th>n Secure Msg</th><th>Notes</th><th>MSC Forms</th><th>+ +</th></td<>	Teams Modules	Email Groups Email/Opt Partial Adm	n Secure Msg	Notes	MSC Forms	+ +
smartphone. This process will also set the icon order, so your most often used icons can be 1st, etc. 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:	Email/Opt Sm	artphone Icons (Top 12 & Order) Toolba	Options			
most often used icons can be 1st, etc. 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: Icon 8: Team Roster Icon 9: Checkout Equipment						
Icon 2: Add Note Icon 3: Injury Plus Icon 4: Add Limitation Icon 5: Add Modality Icon 6: Add Rehab Icon 7: Icon 8: Team Roster Icon 9: Checkout Equipment						
Icon 3: Injury Plus Icon 4: Add Limitation Icon 5: Add Modality Icon 6: Add Rehab Icon 7: Icon 8: Team Roster Icon 9: Checkout Equipment	Icon 1:	View Athlete Info	<u>·</u>			
Icon 4: Add Limitation Icon 5: Add Modality Icon 6: Add Rehab Icon 7: ~ Icon 8: Team Roster Icon 9: Checkout Equipment	Icon 2:	Add Note	<u>·</u>			
Icon 5: Add Modality ~ Icon 6: Add Rehab ~ Icon 7: ~ ~ Icon 8: Team Roster ~ Icon 9: Checkout Equipment ~	Icon 3:	Injury Plus				
Icon 6: Add Rehab Icon 7: Icon 8: Team Roster Icon 9: Checkout Equipment	Icon 4:	Add Limitation	·			
Icon 7: V Icon 8: Team Roster V Icon 9: Checkout Equipment V	Icon 5:	Add Modality	·			
Icon 8: Team Roster V Icon 9: Checkout Equipment V	Icon 6:	Add Rehab	·			
Icon 9: Checkout Equipment	lcon 7:		·			
	Icon 8:	Team Roster	·			
Icon 10: Send Email/Text 🗸	Icon 9:	Checkout Equipment	~			
	Icon 10:	Send Email/Text	·			
Icon 11: Bulk Modality 🗸	lcon 11:	Bulk Modality	·			
Icon 12: Action Items	Icon 12:	Action Items				
Copy Master Clear All		Copy Master Clear All				

Select from the drop down lists, which icons you would like to be available. You can reorder, or use less if you want. You do not have to have all 12 filled in.

TOP

User Setup— Email/Opt Explained:

Toolbar Options

The toolbar options tab allows you to customize the icons that are shown across the top of ATS. You also have the option to change the location of those icons to the sides or bottom of the program. Uncheck an icon if you do not wish it to be on the toolbar. Use the dropdown at the top to select where the toolbar is displayed.

Email/Opt	Smartphone Icons (Top 12 & Order)	Toolbar Options
	Enable/disable the toolbar icons	
		Toolbar Dock:
	🕵 🗹 Athlete Add	
	🎭 🗹 Athlete Search List	
	🎭 🗹 Athlete Search Name	📅 🗹 My Appointments
	🎭 🗹 Athlete Search Team	🕵 🗹 Concuss Eval Add
	🕜 🗹 Injury Add	🍐 🗹 HAL Add
	🚺 🗹 Injury List	🚫 🗹 Check-Out Equip
	Daily Information	🚺 🗹 Kiosk Logins
	🛄 🗹 Quick Functions	🛐 🗹 Inventory Trans
	🕼 🗹 Quick Multi-Function	
	All None	Save Toolbar Settings

Partial Admin Tab:

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.

Securit	y								Ad	min Windows Help	
Teams	Modules	Email Groups	Email/Opt	Partial Admin	Secure	Msg Notes	MSC Forms	Docs/Bill	2	Site Info	
B	Note: IF	you checked	d the "Adm	inistrator" bo	x under	the user na	ame		8	Add/Update Teams & Organizations	+
6	thi	s tab does n	ot apply	it is only for "	Partial"	admins				Users	+
		Admin A	lrea			This lie	st corela	ates	٨	Maintenance	+
		Site Info	ormation						>	Import Cross-Walk	+
		Team(s)) Information			to the	Admin T	「ab. 🛛		Dashboard Statistics>	
		User Inf	ormation				- f t	:		Data Miner	,
		User Re	ports			Use the	e feature	es in			
		Mainten	ance - Drop	down/Popup Li	sts	tho r	menu ar	hd	0	Injury Analytics Reporting	
			ance - ICD-S			uic i	nenu ai	iu –	<u>R</u>	ROI Report	•
				able Docs/Form		subme	nu to as	sign	1	Injury Updates Needed (Admin View) +
				ussion Prompts				U	(Athlete Security	•
				Types and Ten	plates	approp	riate aco	cess	Ø	Drug Testing	•
			ance - Athle	te Forms Pre-Participatio	- 0 1	for v	our user	s		Athlete Utilities	•
			Security	Pre-Participatio	on Quest	ier y		υ.	7	Injury Utilities	
										Scheduling Utilities	
										Inventory Utilities	l l
			Athlete Year	R						Inventory Cultures	,
		· · · · · · · · · · · · · · · · · · ·		ort Demographic	\$				<u>Σ</u>	Update Athlete Years	
				ort Demographic					0	Import/Export	•
		Import/l	Export - Data	alys/NCAA Subr	nissions					Transaction Logs	•
		Transac	tion Logs							Search All Athlete Records	_
		Clear At	hlete Papen	work						Search An Athlete Records	
		Reset C	Jeared to Pla	ay Rags				v	۲	Year-End Processing	•
		Record:		1 Of 44 🕨 🕨					۰	Combine Athlete Records	
		Check	all applic	able module	s for ac	cess			*	Set Required Fields	
									1	Custom Reports	

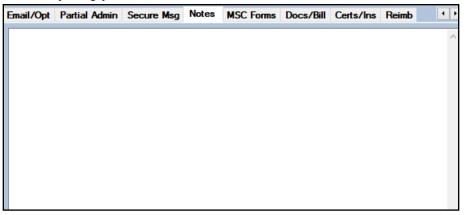
Secure Message tab:

Staff to staff secure messages are stored within the users profile. This tab will display any secure staff-staff messages you have sent. For more information, please check out the <u>Secure Message</u> doc.

Security									
Teams	Modules	Email (Groups	Email/Opt	Partial Admin	Secure Msg	Notes	MSC Forms	• •
Read Create Directio		Ŧ	Messag	je					
11/11/ From St	2021 8:42:08 aff	3 AM	Joe, W	/e have sent ti	he prescription for t	he taper to the pl	hamacy w	ve have on rec	
Record	: 🚺 🖣	1	Of 1						
Sł	iow All	Re	fresh		Print	Details		All related	

Notes Tab:

You are able to keep notes or any things you would like to keep within the users profile. This is an open text area, so are able to enter anything you would like.



MSC Forms Tab:

This area is where all of the Med/Staff/Coach forms are stored. When any of your staff completes these, the history of them being completed will be here. Please view the <u>MSC</u> help doc for more info.

Email/Opt	Partial Admin	Secure Msg	Notes	MSC Forms	Docs/Bill	Certs/Ins	Reimb	4 1
Date	e Created 👻 🛛 Fo	rm Name						
Record:	4 4 0	Of 0 🕨 🕅						_
necora.				~				
Remove	Print/View Form(s)	Print List	Б	cel 👸	TT AA			

Docs/Bill:

The Docs/Bill tab allows you to upload any documents you need to store. As well as upload any billing information if you are participating in billing for services.

Email/Opt	Partial Admin	Secure Msg	Notes	MSC Forms	Docs/Bill	Certs/Ins	Reimb	
Bectronic	c Documents							
Description	1			-				
Record:		0 🕨 📲		- 61-				
Enter a Des Description:	cription then click	the Load button	to choose	a file.				
					1			
Edit Doc	Remove Doc	View Doc	Print List	Load	Save Doo	2		
-Billing In	formation							
Other ID:		Qualifier:	~					

Certs/Ins:

The Certs/Ins tab allows you track BOC certifications, Licensure, or CPR/AED. Also allows the user to enter Personal Insurance information, in case of emergency.

Email/Opt	Parti	al Admin	Secure Msg	Notes	MSC Forms	Docs/Bill	Certs/Ins	Reimb	1	ŀ
Certification		Cert #	Eamed	Expires	State	Comments				^
										~
Record:		0 (Df 0 ▶ ▶	▶ # <					>	
C					I	Remove Cert	ification			
Insure Type	-	Insurance (Company	Policy #	Expirati	on Date				^
	_									\sim
Record:	4	0 (Df 0 ▶ ▶∥	▶∺ <					>	
()						Remove Ins	urance			

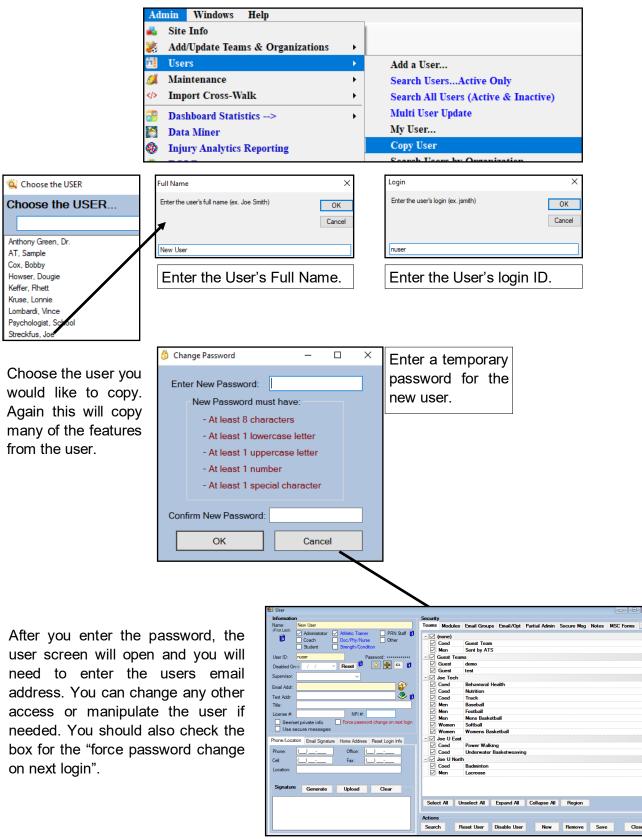
Reimbursement Tab:

The Reimbursement tab allows you to track any details related to reimbursements.

Emai	l/Opt	Partial Ad	lmin	Secure Msg	Notes	MSC	Forms	Docs/Bill	С	erts/Ins	Reimb	4 >
Rei	mburs	ements										
Dat	е		Amo	unt	Status		Date Pa	id		Comment		
Rec	ord:		0	Of 0 🕨								
					Remove	e Reim	bursem	ent				

Copying Users:

Copying users allows you to copy settings from one user to another. This option copies all of the module settings so you do not need to remember the specific settings. This would be the most beneficial in creating multiple restricted users; coaches, PRN, or students.



Editing Existing User Accounts:

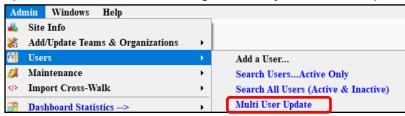
User Utilities:

The User Utilities Menu option allows you to mass change several of the options for the users in your database. This allows you to in bulk, check off or uncheck access or assign Partial Admin Access to your users. This screen also allows you the ability to copy the <u>Key Phrases</u> from the master list that is created in site info.

Adı 2010 2011 2011 2011 2011 2011 2011 201	min Windows Help Site Info Add/Update Teams & Organizations Users > Maintenance > Import Cross-Walk >	Add a User Search UsersActive Only Search All Users (Active & Inactive)		
	Dashboard Statistics -> > > Data Miner Injury Analytics Reporting ROI Report > Injury Updates Needed (Admin View) >	Multi User Users (Active & Inactive) Multi User Copy User Search Users by Organization User Utilities	•	hletic Trainer
*** () ()	Athlete Security > Drug Testing >	User Lists User Detail Reports	, , ,	Change User Password <u>Check/Uncheck Info for All Active Users:</u> Show injury updates needed on login
•	Athlete UtilitiesInjury UtilitiesScheduling Utilities	User Login Reports User Athlete Activity MSC Reports	+ + +	Show daily info screen on login Show new injuries entered notice during login Show expiring insurance notice on login Show expiring physical notice on login
*	Inventory Utilities Update Athlete Years	User List for Email Groups User Login/Password List User Transaction Log	•	Copy Key Phrase from Master to All Bulk Set Module Access for Selected Users
0	Import/Export > Transaction Logs >			Bulk Set Module Access for Selected Users Global Module Access Process Global Partial Admin Access Process

Multi-User Update:

The Multi-User Update allows you to see all of your active staff initially, and quickly move through their staff profiles. You can make changes to many of the same options as the regular profile.



Use the blue buttons at the bottom left of the screen, to scroll profiles. You can change many of the options for the staff member.

Use the other tabs to go through the options you can go through the profile.

						Joe St	reckfus			22 👤			
User Name	Joe Streckfus		PW			_				, .	-,		
Login ID	Joe Streckfus		2	Т	eams	Modules	Groups	Admin	MSC	eFiles	Certs	Insurance	Reimburse
Password					-17	(none)							
Phone	(888) 328-2577		+	ľ		(none) Coed	Guest 1	eam					Select All
Email Address	joe@kefferdevelopment.com		CL			Men	Sent by						Unselect All
Disabled On	Re	set				Guest Tear							
Administrator				ľ		Guest	demo						Expand All
ATC						Guest	test						Collapse All
Student				ľ	- 🗹	Joe Tech							
Doc/Phys/Nurse						Coed	Behavio	oral Heat	th				Region
Coach					\square	Coed	Nutritio	n					
Strength Coach					\square	Coed	Track						
Regional Admin			=			Men	Baseba						
Region	0					Men	Footbal						
Office Phone						Men Women	Mens B Softball	asketbal					
Cell Phone	() -					Women		s Basket	h all				
Location						Joe U East	Tronici	a Daaket	Vali				
See Private	V			Ľ		Coed	Power	Nalking					
No Reports						Coed		ater Bas	ketwea	vina			
Allow To Print	V				-17	Joe U Norti				-			
Allowed To Submit	V					Coed	Badmin	ton					
Allow To Export	V					Men	Lacross	e					
Group Emails Allowed		[]											
Note Batch Allowed	V												
See All Injuries	V												
Allow Secure Msg	V	······	_										
Last Login	1/30/2023			Ľ									
Coad Matian	4 Of 10 → →		r			Users		User	- Pi	able Us		New User	