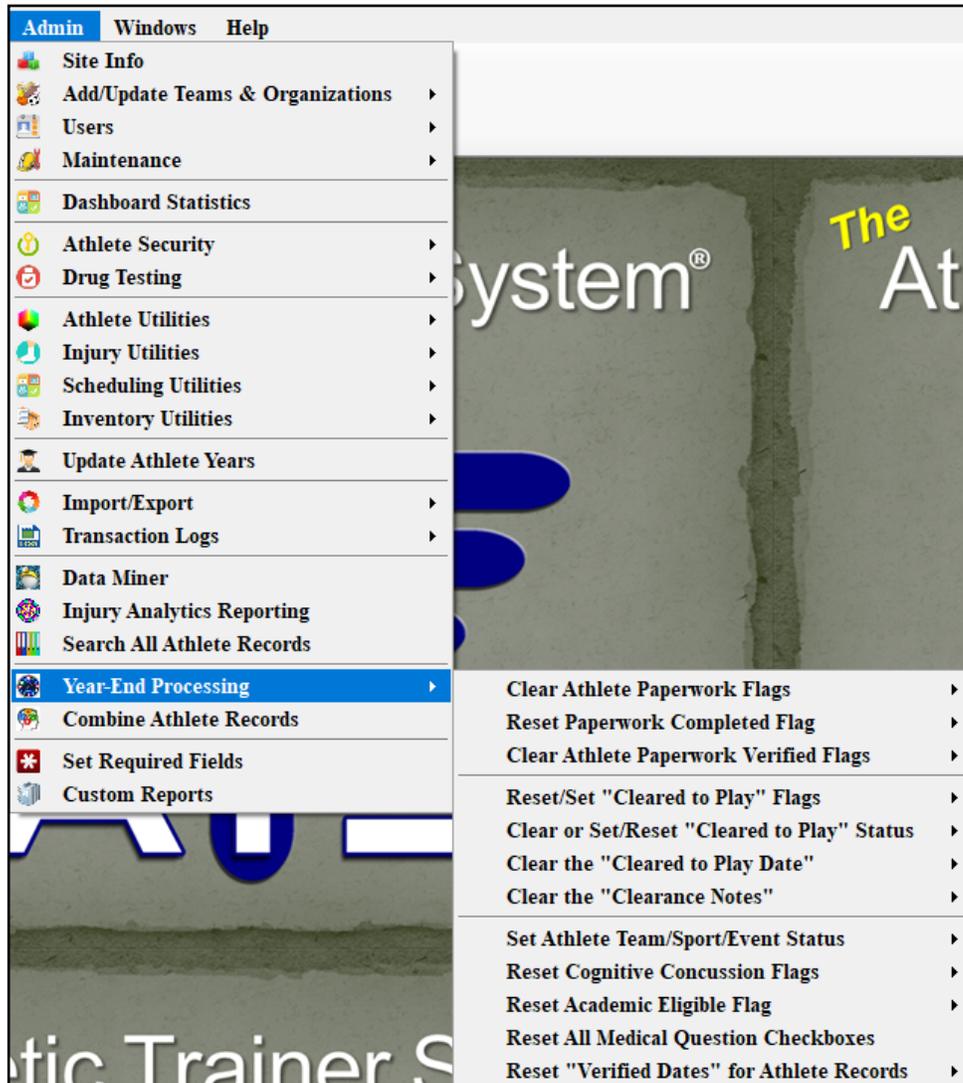


The **Year-End Processing** options, found under the admin tab, allow you to reset the turned in or completed check offs done throughout the year to prepare for the next school year.

To find the year end options select admin—> Year end processing



Each of the menu items will be explained in the following pages, each will describe and explain the sub menu functions.

Year End Processing

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Task	Page	Video Link if Available
Clear the Athlete Paperwork Flag	3	
Reset Paperwork Completed Flag	Top 4	
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Clear Clearance Notes	Top 6	
Set Athlete Team/Sport/Event Status	Bot 6	
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Reset the Academic Eligible Flag	Bot 7	
Reset Verified Date for Athlete Records	8	
Other Recommended End of Year Clean Up		
Update Athlete Year Popup	Top 9	
Update Athlete Years	Bot 9	Update Athlete Year Video
Disable Old Users	10	Disable Old Users Video
Resolve Current Injuries	Top 11	
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Disable Nightly Reminders	Bot.11	
Update Athlete Insurance	Top 12	
Update System Calendar	Bot 12	
Force Password Change	13	
Video Walk Through: Year End Processing Menu		

Clear Athlete Paperwork Flags:

You can clear the paperwork flags for all athletes in your system, for a specific team or Organization, or for a Specific Paperwork Entry.

Clear Athlete Paperwork Flags ▶	For All
Reset Paperwork Completed Flag ▶	For a Team
Clear Athlete Paperwork Verified Flags ▶	For an Organization
Reset/Set "Cleared to Play" Flags ▶	For a Specific Paperwork Entry
Clear or Set/Reset "Cleared to Play" Status ▶	Create eFile Archive - All Athletes
Clear the "Cleared to Play Date" ▶	Create eFile Archive - Team(s)
Clear the "Clearance Notes" ▶	Create eFile Archive - Organization

You have the ability to remove the paperwork submission flags. This process also removes the submission dates that are associated with the paperwork item. This process will work whether the item was checked off from the online submission, or if it was manually checked as submitted.

Paperwork...	Submitted	Submit Date	Verified	Comment
Ashley U Questionnaire	<input type="checkbox"/>		<input type="checkbox"/>	
Certification	<input type="checkbox"/>		<input type="checkbox"/>	
Physical Form	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Previous Injury History	<input checked="" type="checkbox"/>	01/10/18	<input type="checkbox"/>	
Health Habits	<input type="checkbox"/>		<input type="checkbox"/>	
NCAA Concussion Review	<input type="checkbox"/>		<input type="checkbox"/>	
Ashley U Sports Participation Agreement	<input checked="" type="checkbox"/>	05/10/18	<input checked="" type="checkbox"/>	
NCAA Concussion Fact Sheet for Student At...	<input checked="" type="checkbox"/>	05/11/18	<input checked="" type="checkbox"/>	

Record: 1 Of 8

Create eFile Archive:

- Create eFile Archive - All Athletes**
- Create eFile Archive - Team(s)**
- Create eFile Archive - Organization**

Utilizing the Create eFile Archive process will allow you, PRIOR to clearing the paperwork check flags, to create a copy that will be stored in their eFiles. This can be utilized to show that paperwork was submitted, the dates and that it was verified by a member of the staff.

****** Again, this process must be done PRIOR TO RUNNING THE CLEAR PROCESS. ******

Reset Paperwork Complete Flag:

Clear Athlete Paperwork Flags	▶	
Reset Paperwork Completed Flag	▶	For All
Clear Athlete Paperwork Verified Flags	▶	For Team
Reset/Set "Cleared to Play" Flags	▶	For Organization

This will clear the check mark indicating all Paperwork has been completed from all the associate areas you can view that. This status also correlates to the status of the Paperwork in the Paperwork reports. You can choose between running this for All athletes, a Specific Team or Organization.

Clear Athlete Paperwork Verified Flag:

Clear Athlete Paperwork Flags	▶	
Reset Paperwork Completed Flag	▶	
Clear Athlete Paperwork Verified Flags	▶	For All
Reset/Set "Cleared to Play" Flags	▶	For a Team
Clear or Set/Reset "Cleared to Play" Status	▶	For an Organization
Clear the "Cleared to Play Date"	▶	For a Specific Paperwork Entry

This process will clear out the check marks in the Verified column in the Paperwork area of the Athlete Profile. This box is typically manually checked off after the AT verifies the information in the completed form is accurate.

Clear the entry for everyone in the DB, a specific team, an organization, or clear it for a specific entry.

Reset/Set the Cleared to Play Flag and/or Status:

Clear Athlete Paperwork Flags	▶	
Reset Paperwork Completed Flag	▶	
Clear Athlete Paperwork Verified Flags	▶	
Reset/Set "Cleared to Play" Flags	▶	For All
Clear or Set/Reset "Cleared to Play" Status	▶	For a Team
Clear the "Cleared to Play Date"	▶	For an Organization
Clear the "Clearance Notes"	▶	
Set Athlete Team/Sport/Event Status	▶	Set All to Cleared
Reset Cognitive Concussion Flags	▶	Set Team to Cleared
		Set Organization to Cleared

Reset or set the Athlete's CTP Flag. This also corresponds to the reports and CTP check.

Clear Athlete Paperwork Flags	▶	
Reset Paperwork Completed Flag	▶	
Clear Athlete Paperwork Verified Flags	▶	
Reset/Set "Cleared to Play" Flags	▶	
Clear or Set/Reset "Cleared to Play" Status	▶	Clear For All
Clear the "Cleared to Play Date"	▶	Clear For Team
Clear the "Clearance Notes"	▶	Clear For Organization
Set Athlete Team/Sport/Event Status	▶	Set/Reset the All
Reset Cognitive Concussion Flags	▶	Set/Reset for Team
Reset Academic Eligible Flag	▶	Set/Reset for Organization

Reset or set the Athlete's CTP Status. This also corresponds to the reports and CTP status.

Clear Athlete Paperwork Flags	▶	
Reset Paperwork Completed Flag	▶	
Clear Athlete Paperwork Verified Flags	▶	
Reset/Set "Cleared to Play" Flags	▶	
Clear or Set/Reset "Cleared to Play" Status	▶	
Clear the "Cleared to Play Date"	▶	For All
Clear the "Clearance Notes"	▶	For a Team
Set Athlete Team/Sport/Event Status	▶	For an Organization

Reset or set the Athlete's CTP Date. This also removes it from the team entry line.

Athlete - Davis, Crash

Archived

Cleared to Play / / CTP Status: Cleared

Team/sport/Event	Status	Position/Dts	As Of	CTP Date	Jersey #	Clearance Notes	R	M
Joe Tech Men Baseball	Active							
Joe Tech Coed Behavioral Health	Active		10/4/2021					

Record: 1 of 2

Mark for review Pwk Comp Cog Concuss Complete

Clear the Clearance Notes:

Reset/Set "Cleared to Play" Flags	▶
Clear or Set/Reset "Cleared to Play" Status	▶
Clear the "Cleared to Play Date"	▶
Clear the "Clearance Notes"	▶
Set Athlete Team/Sport/Event Status	▶
Reset Cognitive Concussion Flags	▶

For All

For Team

For Organization

Use the Clear the Clearance Notes option to remove any notes that were made when they were cleared.

Athlete - Davis, Crash

Archived Cleared to Play / / CL CTP Status: Cleared

Team/Sport/Event	Status	Position/Ds	As Of	CTP Date	Jersey #	Clearance Notes	R	M
Joe Tech Men Baseball	Active							
Joe Tech Coed Behavioral Health	Active		10/4/2021					

Record: 1 of 2

Mark for review Pwk Comp Cog Concuss Complete Card View

Set Athlete Team/Sport/Event Status:

Set Athlete Team/Sport/Event Status	▶	For All
Reset Cognitive Concussion Flags	▶	For a Team
Reset Academic Eligible Flag	▶	For an Organization
Reset All Medical Question Checkboxes	▶	For an Athlete Year
Reset "Verified Dates" for Athlete Records	▶	For a Team/Athlete Year

Using the Set team/sport/event status menu, you can set a status for the options in the image. This allows you to activate, or inactivate groups or everyone for the options selected.

Choose the Status

Choose the Status...

Search

- Active
- Released
- Waived
- Inactive

Athlete - Davis, Crash

Archived Cleared to Play / / CL CTP Status: Cleared

Team/Sport/Event	Status	Position/Ds	As Of	CTP Date	Jersey #	Clearance Notes	R	M
Joe Tech Men Baseball	Active							
Joe Tech Coed Behavioral Health	Active		10/4/2021					

Record: 1 of 2

Mark for review Pwk Comp Cog Concuss Complete Card View

Reset the Cognitive Concussion Flag:

Set Athlete Team/Sport/Event Status	▶	
Reset Cognitive Concussion Flags	▶	For All
Reset Academic Eligible Flag	▶	For a Team
Reset All Medical Question Checkboxes		For an Organization
Reset "Verified Dates" for Athlete Records	▶	For an Athlete Year

You can reset the Cognitive Concussion Flags, these correspond CCC or Cog Concuss Complete areas of the athlete profile, and associated reports.

The screenshot shows the athlete profile for 'Crash Davis' on the left. In the center, there are buttons for 'Mark for review', 'Pwk Comp', and 'Cog Concuss C'. On the right, a 'Quick Multi-Function' table lists athletes with columns for 'Athlete', 'Year', 'Team', 'Player Position', 'Cleared', 'PPWK', 'CCC', 'Birthdate', 'Gender', and 'Email'. The 'Cog Concuss Complete' column contains checkboxes, with one checked for 'Adams, Leigh Ann'. Below the table, there are tabs for 'Contacts', 'Vaccinations', 'Alerts/Notes', 'Paperwork', 'Athlete Forms', 'eFiles', 'Notes', 'Physicals', 'Insurance', 'Emer', 'Concuss', 'Team', 'General', 'Acad Elig', 'Sickle Cell', 'Cardiac', and 'COVID-19'. A 'Cog Concuss Complete' button is visible in the bottom right corner.

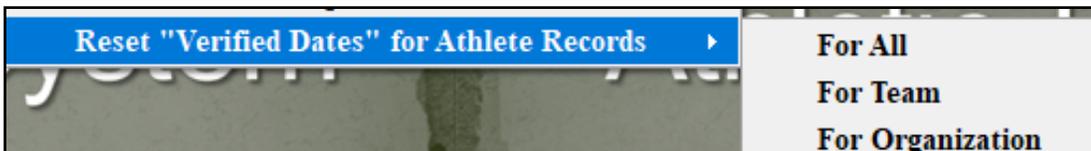
Reset the Academic Eligible Flag:

Reset Academic Eligible Flag	▶	All
Reset All Medical Question Checkboxes		by Team
Reset "Verified Dates" for Athlete Records	▶	by Organization

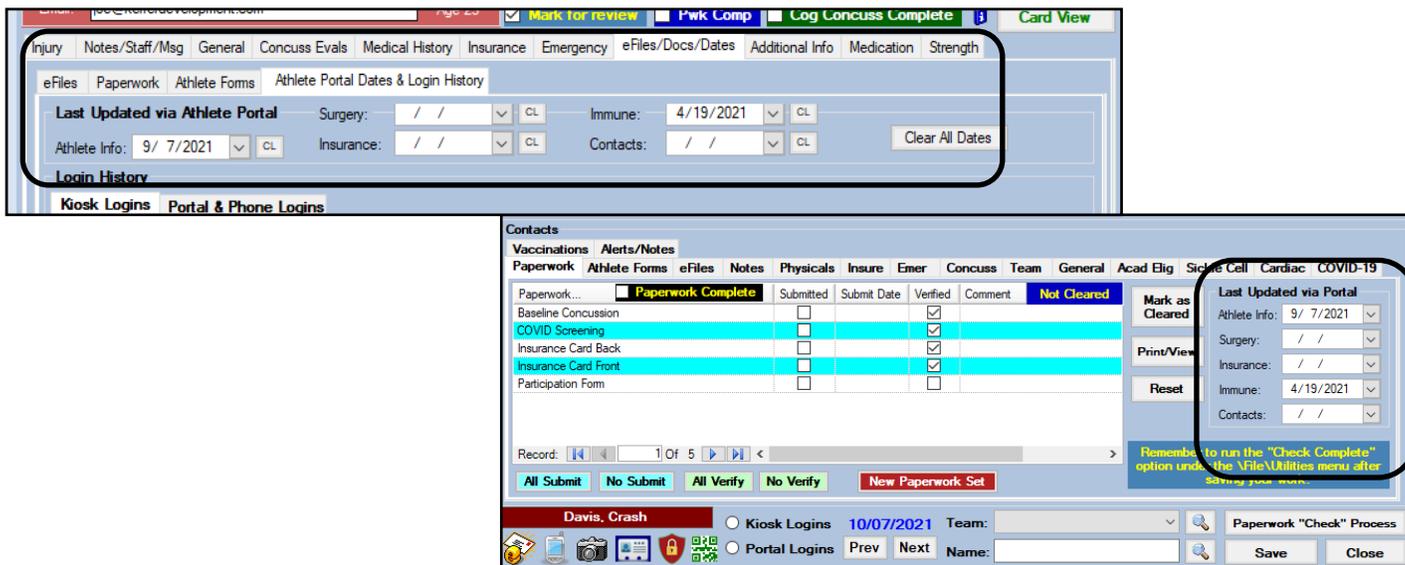
Use the reset academic eligible flag menu item to reset the academic eligible flag in the general tab area of the athlete profile, and associated reports.

The screenshot shows the 'Academic Eligibility' tab in the athlete profile. It contains fields for 'Current School', 'Eligible Until', 'GPA', 'Previous School', 'Graduated?', 'SAT Score', 'ACT Score', and 'Class Rank'. A checkbox labeled 'Academic Eligible' is highlighted with a red box. There are also checkboxes for 'Full Schedule?' and 'Amateur Status?'. A 'Note Type' dropdown menu is at the bottom.

Reset Verified Date for Athlete Records



Use the Reset Verified Dates for Athlete Records menu option to clear out the dates that correspond to when the athlete updated their personal information. This can help you see the most current information when looking for login dates.



The remainder of this document will show other year end process items that we recommend being done when wrapping up the year. Running some of the processes at the conclusion of the school year can help avoid confusion when athletes begin to complete their registration process.

Update Athlete Years Popup:

Updating the athlete years, depending on how you keep your years, should be done in the popup menu. This can help when you are updating years, and archiving athletes, to know when they became inactive.

Description	Abbrev	NCAA/HS Year	Sort	Active	Last Used	Athlete See	rSchool Grade
Guest	Guest		0	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Screen	Screen	Upper	0	<input type="checkbox"/>		<input type="checkbox"/>	
Freshman	Freshman	FR	1	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
Sophomore	Sophomore	SO	2	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Junior	Junior	JR	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Senior	Senior	SR	4	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Transfer	TSF		5	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Transfer Jr	TSFJ		5	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Transfer Sr	TSFS		5	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Grad 2019	Grad 2019		11	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Grad 2020	Grad 2020		11	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Grad 2021	Grad 2021		11	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Grad 2022	Grad 2022		11	<input checked="" type="checkbox"/>		<input type="checkbox"/>	

Updating Athlete Years:

Updating athlete years, allows you to migrate your athletes from class to class if you keep them as the traditional grade levels or any combination of that. This process will bulk move your athletes from one year to the other, and allow you to close out and archive the graduating class. For full, in-depth description on the process, please review the [Update Athlete Years and Archiving](#) doc.

The screen to the left shows the menu for updating the years. This is a desktop only feature, as well as an administrative feature. Select the organization, and then the class year to move; also make sure if you want to archive the class year you select that as well.

As the note reminds you, always start with the oldest group and move them first. If you start at freshman/first year students, and move them up accordingly, you will move them all to one list and archive them all.

Removing User Access:

Another area that we recommend to clean up at the end of the year, is disabling any user that may no longer be there. This ensure the security of your system, and protects your data from unauthorized access.

When you have a staff member, coach, or other user leave or no longer need access; you should take the steps below to revoke their access to your database. A user should **NOT** be **DELETED**, but instead utilize the Disable Button, to deactivate them. By disabling them, there is a process ATS will do for you, that removes their access completely and preserves the records associated with their account.

The screenshot shows a web application window titled 'User' with two main sections: 'Information' and 'Security'.

Information Section:

- Name: Joe Streckfus (First Last)
- Roles: Administrator, Athletic Trainer, PRN Staff, Coach, Doc/Phy/Nurse, Other, Student, Strength/Condition
- User ID: Joe Streckfus, Password: *****
- Disabled On: / /, with a 'Reset' button.
- Supervisor: (dropdown menu)
- Email Addr: joe@kefferdevelopment.com
- Text Addr: (text field)
- Title: (text field)
- License #: (text field)
- Force password change on next login
- Use secure messages
- Phone/Location, Email Signature, Home Address, Reset Login Info
- Phone: () - - , Office: () - -
- Cell: () - - , Fax: () - -
- Location: (text field)
- Region: 0, Regional Admin
- Signature: Generate, Upload, Clear
- Handwritten signature: Joe Streckfus

Security Section:

- Teams, Modules, Email Groups, Email/Opt, Partial Admin, Secure Msg, Notes, MSC Forms
- Tree view:
 - (none)
 - Coed Guest Team
 - Men Sent by ATS
 - Guest Teams
 - Guest demo
 - Guest test
 - Joe Tech
 - Coed Track
 - Men Baseball
- Buttons: Select All, Unselect All, Expand All, Collapse All, Region
- Actions: Search, Reset, **Disable** (highlighted), New, Remove, Save, Close

Text Box:

Process to disable is to hit the **DISABLE** button. Hitting this button will deactivate the user completely. It fills in the Disable on date, removes access to modules, and teams, and also will reset their "reset account questions", so they are not able to reset their password.

For full details on disabling a user; make sure to review the [Disabling a User](#) document.

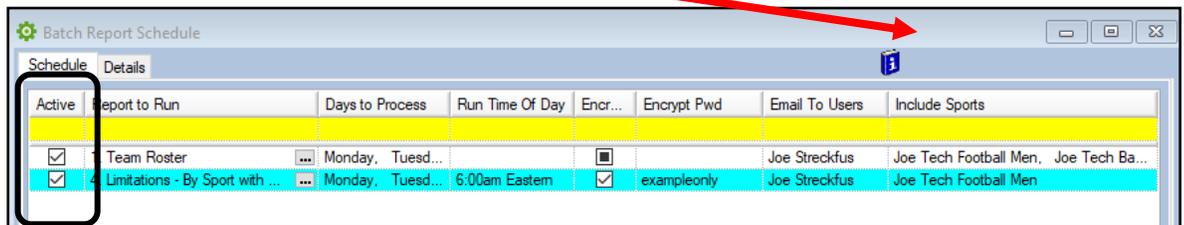
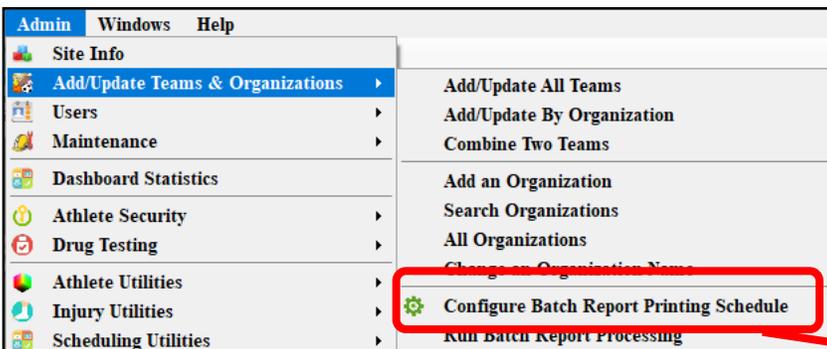
Resolve Current Injuries:

You have the option to resolve the current injuries for the database. This bulk process will allow you to clean up your current injuries to start over, for the next fall. Running this process will allow you to resolve the default injury as well.



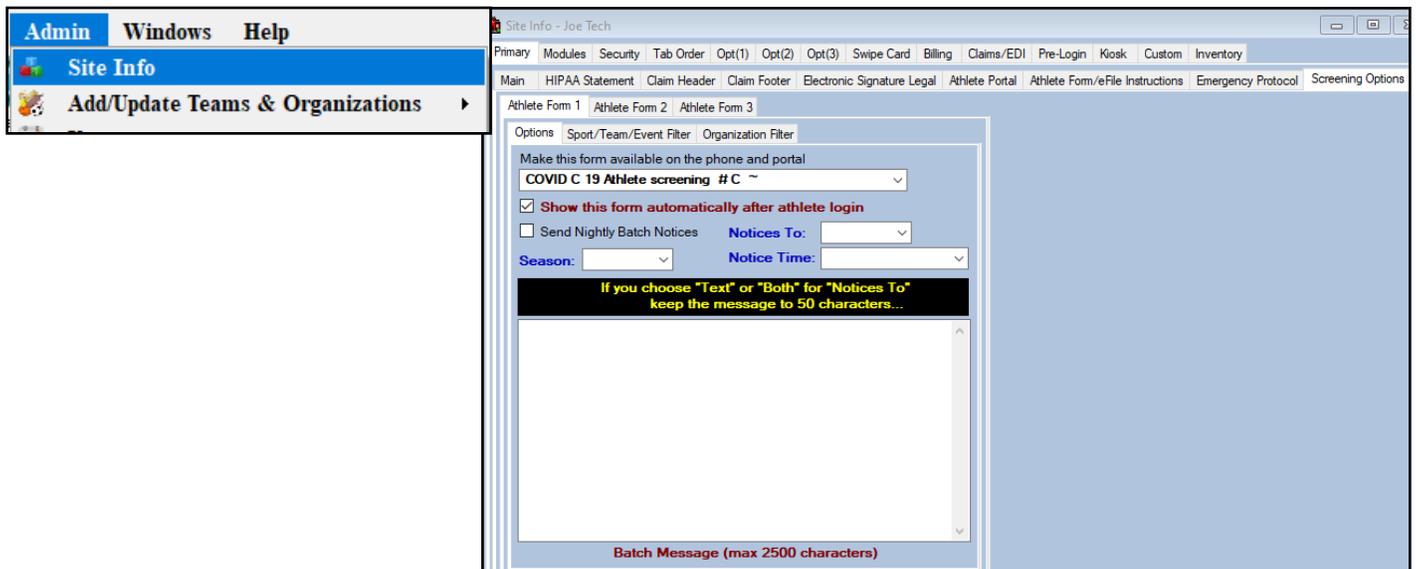
Turn Off Batch Reports:

After the year ends, if you have set up the automated emails you should turn them off so there are no unnecessary emails being sent out. This is done by going to the Batch Report Schedule, and then unchecking the ACTIVE box for the reports that do not need to run, such as a limitation report or injury report.



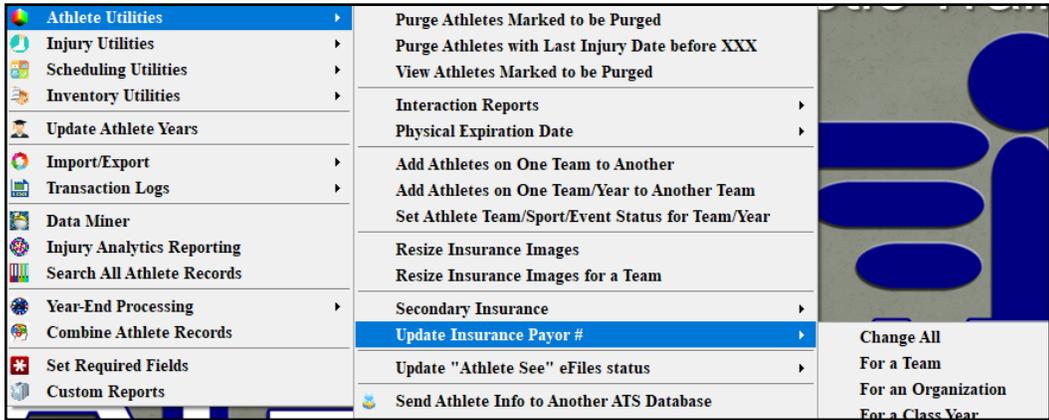
Turn Off Nightly Screening Reminders:

If you are using ATS to do your screenings, you can stop the nightly reminders to complete the screenings by turning off the nightly reminders in Site Info.



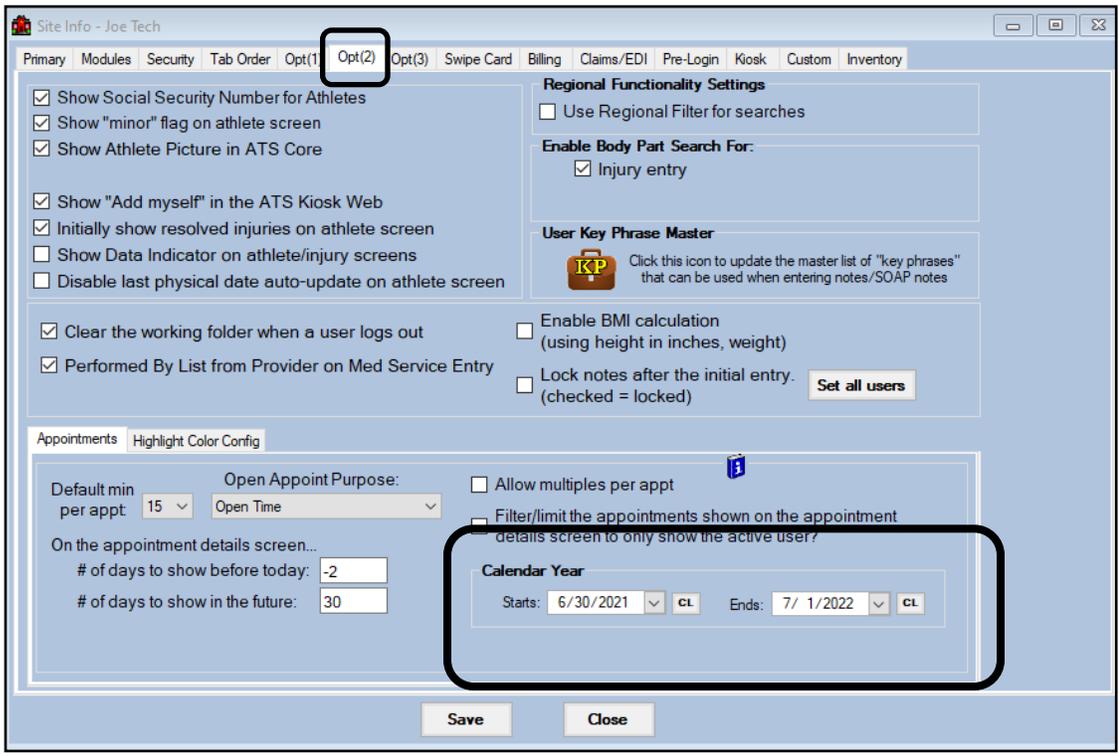
Update Insurance/Archive Current Insurance:

Updating the insurance Payor Number allows you to archive and not delete the current insurance entries that are contained in ATS. This is the recommended way to have the athletes reenter insurance information from year to year; to ensure you have up-to-date information. Doing this enters a 99 in the insurance, keeping it for archive purpose so if you have a claim from that year; you have the information.



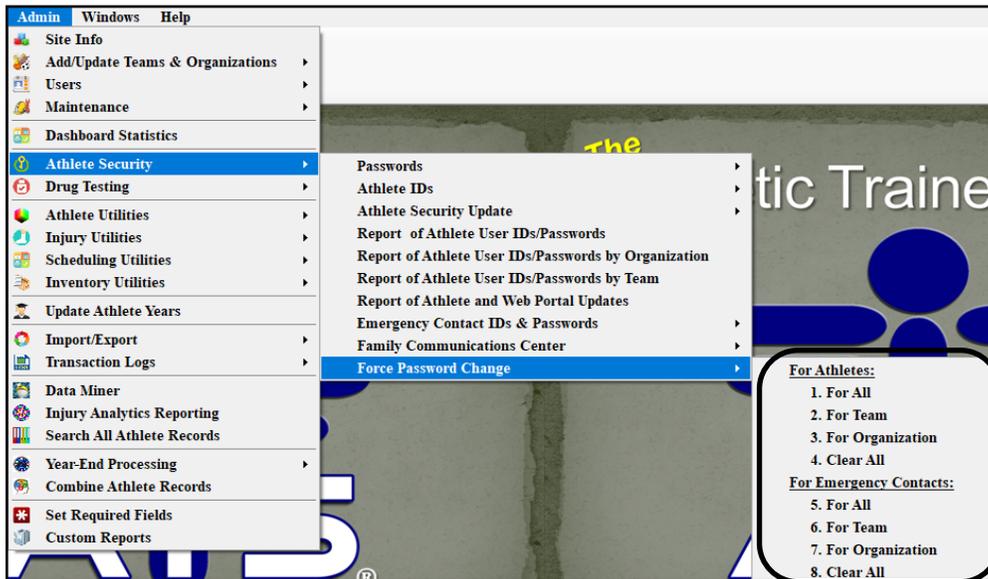
Update the System Calendar:

Updating the Site Information calendar is necessary to ensure proper functioning of the Scheduling feature in ATS. Also, if you are doing Datalys reporting, this will ensure that the dates you have added populate, as well as allow you to add a date on the fly if necessary.



Force Password Change for Athletes/Emergency Contacts:

ATS does recommend, you making your athletes and the emergency contacts (if using the Family Communication Center), change their password every year. This can be done by going through the Admin Menu shown below.

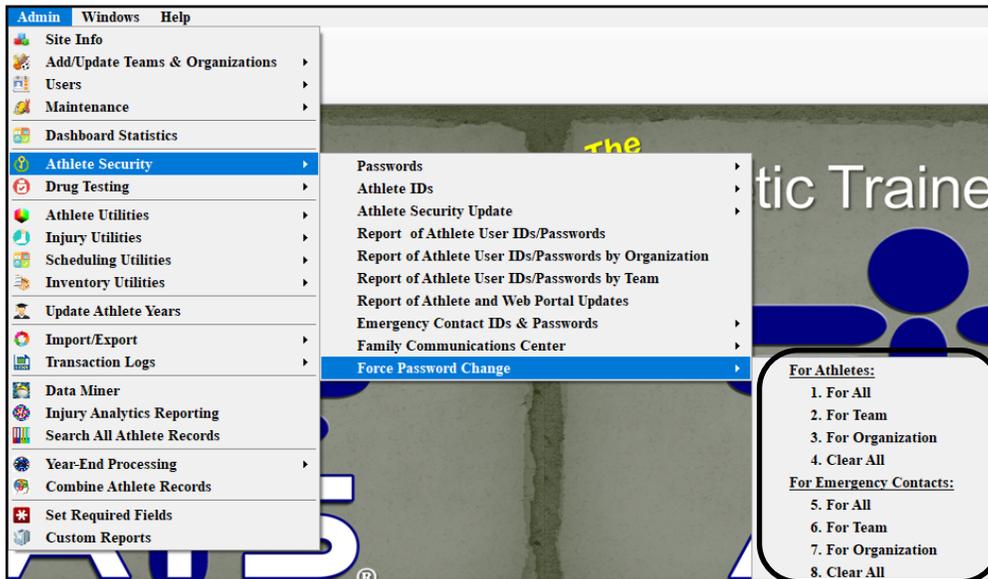


You are able to force the passwords to be changed for athletes and EC, by using the menu. You can also clear the passwords and the utilize the Password option in the menu to generate a new, random password for them.

For full explanation of the Athlete Security menu, please review the [Athlete Security](#) help doc.

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