

ATS: Linking E-Files to the Paperwork List

You can link specific E-Files to your Paperwork list, allowing its submission to be checked off along with the online athlete forms. To begin you must first update your paperwork list in the Dropdown/Popup Area.

Description	Abbrev	Sort	Active	Last Used	eFile Type	Form X-Walk
Baseline Concussion	Bconc	0	<input checked="" type="checkbox"/>			
COVID Screening	Covid	0	<input checked="" type="checkbox"/>		Pre-Amtval COVI...	* 18 Concussion Symptom Diary
HIPAA	HIPAA	0	<input type="checkbox"/>		Private Health R...	
Insurance agreement	INS	0	<input type="checkbox"/>			
Insurance Card Back	Ins Back	0	<input checked="" type="checkbox"/>		Insurance Card ...	
Insurance Card Front	Ins Front	0	<input checked="" type="checkbox"/>		Insurance Card F...	
Participation Form	Pre Part	0	<input checked="" type="checkbox"/>		0	* 29 Medical Consent
Sickle Cell Results	Sickle	0	<input type="checkbox"/>			* 12 College Sickle Cell with video Trait Verification Waiver Form

Record: 1 Of 8

DO NOT use single or double quotes in your "Description" or "Abbrev" areas. This may lead to issues in reports and making choices.

Note: When adding a new item be sure to enter Description, Abbrev, and Sort...then SAVE before using the "Form X-Walk" functionality

Remove Copy Save Print To Excel Close

To get to the paperwork list first go to the admin menu. Select admin—> Maintenance —>Dropdown/Popup list—> Update Dropdown/Popup lists. Then find Paperwork in the dropdown menu.

You will need to fill out several areas: **Description**, give it a unique **Abbreviation**, the **sort number**, mark it **active**, and then choose the specific **eFile** type. Your athletes will be selecting this specific eFile type when uploading their file from the Athlete Portal. ***Each efile type needs to be unique, you cannot use the same type twice in the crossover area.** Once you hit save you will be prompted to run the verify paperwork utility. This is the utility that will link your eFile to your paperwork list. If you choose not to run it at this time you can also find the utility under the File menu. File—> Utilities—>Run Paperwork Verification

ATS

We recommend that you verify the paperwork list changes against the existing entries. Do you want to do this now?

Yes No

Verification— builds the paperwork list in the athlete profile, and check them off when completed.

Check Complete— will check off the paperwork complete flag in the athlete profile.

Check process— will go "Back In Time" looking for submitted paperwork and then check it off.

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Once you have run the paperwork verification you should now see the efile type you added in your Paperwork list along with any online forms you use. When an athlete submits the online form, it will be checked off, the same as the forms they are filling out. The Paperwork list can be found under the eFiles tab—> paperwork sub tab

The screenshot shows the 'Athlete - Davis, Crash' profile page. The 'eFiles' tab is selected, and the 'Paperwork' sub-tab is active. A table lists various documents with columns for Date, Doc Type, Description, and Athlete Status. A red circle highlights the 'Paperwork' sub-tab and the document list.

Date	Doc Type	Description	Athlete St
12/30/2020	Insurance Card ...	Athlete Upload: Insurance Card Back	<input type="checkbox"/>
12/30/2020	Insurance Card F...	Athlete Upload: Front Insurance Card	<input type="checkbox"/>
12/30/2020	0	Athlete Form: Form Created - COVID 19 Athlete screening	<input type="checkbox"/>
12/30/2020	Form	Athlete Upload: Covid testing	<input type="checkbox"/>
12/22/2020	Form	Athlete Upload: test a phone	<input type="checkbox"/>
12/22/2020	Form	Athlete Upload: test upload	<input type="checkbox"/>
12/22/2020	Form	Test staff upload	<input type="checkbox"/>
12/22/2020	0	test staff phone	<input type="checkbox"/>
12/22/2020	0	test Cp	<input type="checkbox"/>
12/15/2020	Form	Athlete Upload: Physical	<input type="checkbox"/>
12/3/2020	0	Athlete Form: Form Created - COVID 19 Athlete screening	<input type="checkbox"/>

This close-up view of the 'Paperwork' sub-tab shows a table with columns: Paperwork..., Submitted, Submit Date, Verified, and Comment. A red box highlights the 'Insurance Card Back' and 'Insurance Card Front' rows, which have their 'Submitted' checkboxes checked.

Paperwork...	Submitted	Submit Date	Verified	Comment
Baseline Concussion	<input checked="" type="checkbox"/>	12/30/2020	<input type="checkbox"/>	
COVID Screening	<input type="checkbox"/>		<input type="checkbox"/>	
HIPAA	<input type="checkbox"/>		<input type="checkbox"/>	
Insurance agreement	<input type="checkbox"/>		<input type="checkbox"/>	
Insurance Card Back	<input checked="" type="checkbox"/>	12/30/2020	<input type="checkbox"/>	
Insurance Card Front	<input checked="" type="checkbox"/>	12/30/2020	<input type="checkbox"/>	
Participation Form	<input checked="" type="checkbox"/>	8/6/2020	<input type="checkbox"/>	
Sickle Cell Results	<input type="checkbox"/>		<input type="checkbox"/>	

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The screenshot shows the 'Athlete Information - JOE TECH' portal. The 'eFiles' tab is selected and circled. Below it, there is a section for 'Electronic Files' provided by staff, with a table listing forms like 'Physical Form', 'Insurance', and 'Private Health Information Release'. Below that, there is a section for 'Electronic Files uploaded by the athlete' with an 'Upload Document' button circled. An arrow points from this button to a modal dialog box titled 'Upload an Electronic Document'. The dialog box contains fields for 'Description', 'Document Type', and 'File', along with 'Upload' and 'Close' buttons.

Type	Description	Instructions	Download
Physical Form	Physical sample form	Please print and take to your doctor for your physical exam.	Download
Insurance	Insurance	This form is for Sophomore, Junior, and Senior Athletes. Freshmen do not need to fill out and upload.	Download
	Private Health Information Release	This form is for all student athletes to fill and sign. Please fill out and upload a copy of your form directly back to ATS.	Download

Date	Description	View
12/30/2020	Athlete Upload: Insurance Card Back	View
12/30/2020	Athlete Upload: Front Insurance Card	View
12/30/2020	Athlete Upload: Covid testing	View
12/22/2020		View
12/22/2020		View
12/15/2020		View

Athletes can upload their document from the eFiles section of the athlete portal. After they select the upload button it will open the upload screen. They need to give a description and select the correct document type (this must be the same as the edoc type you selected in your paperwork dropdown list for it to be checked off as submitted in the athlete's paperwork area), choose the file they want to upload, and click the upload button.

The screenshot shows the 'Athlete Information - JOE TECH' portal with the 'eFiles' tab selected. A green notification banner at the top of the page reads: 'Document successfully uploaded.' with a checkmark icon and a close button (X).

You will see the notification at the top of their page saying the document was successfully uploaded.