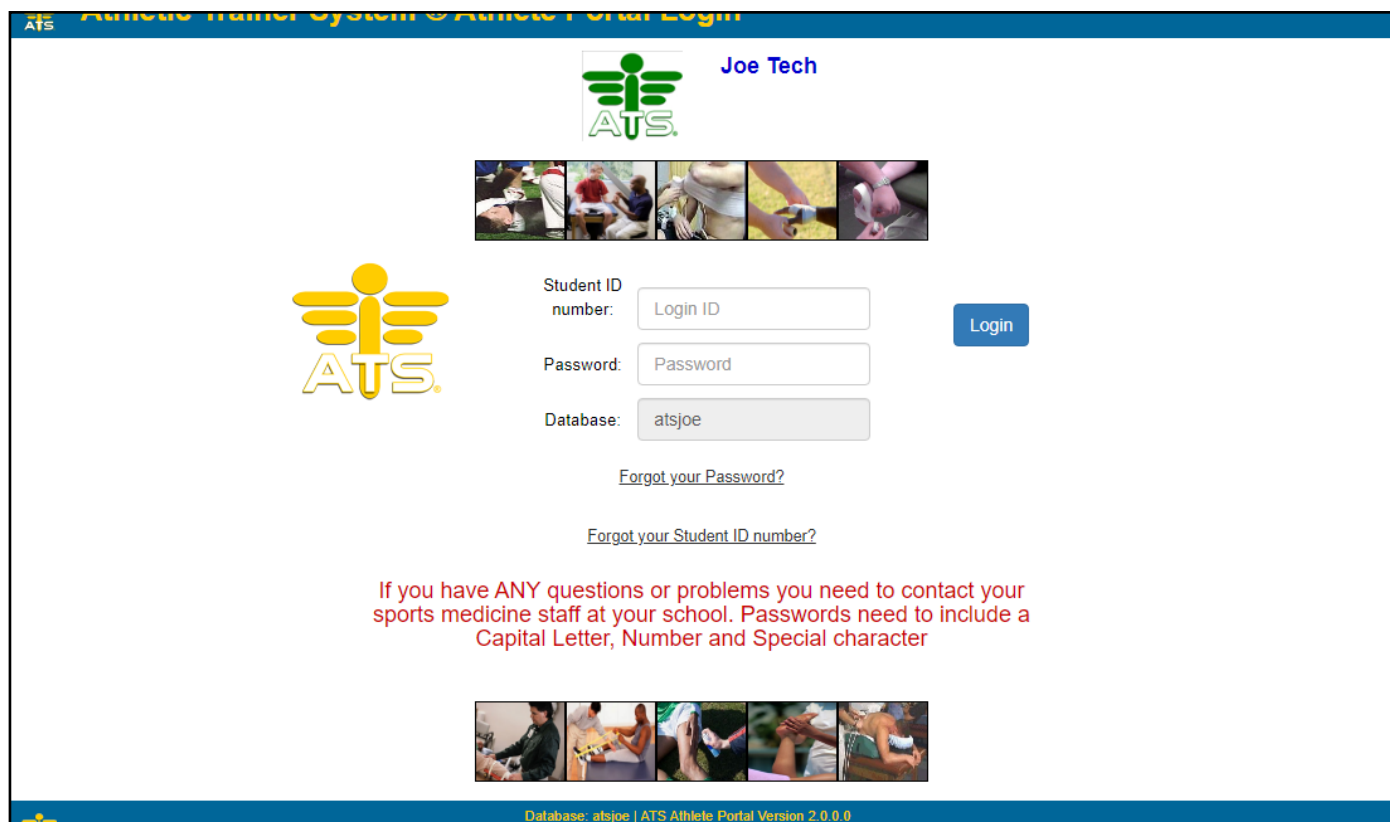


ATS: How to Set up the Athlete Portal

There are multiple ways to set up your Athlete Portal, the set ups vary depending on the types of information you wish to collect and other requirements. This document will go through the basic steps and areas you need to access to set up your Athlete Portal the way you wish.



The screenshot shows the login interface for the ATS Athlete Portal. At the top, it says "ATS Athlete Portal System © Athlete Portal Login" and "Joe Tech". The ATS logo is displayed in green. Below the logo is a row of five small images showing athletes and medical staff. To the left of the login form is a larger yellow ATS logo. The login form includes three input fields: "Student ID number:" with the value "Login ID", "Password:" with the value "Password", and "Database:" with the value "atsjoe". A blue "Login" button is to the right of the fields. Below the fields are two links: "[Forgot your Password?](#)" and "[Forgot your Student ID number?](#)". A red text block reads: "If you have ANY questions or problems you need to contact your sports medicine staff at your school. Passwords need to include a Capital Letter, Number and Special character". At the bottom, there is another row of five small images and a footer that says "Database: atsjoe | ATS Athlete Portal Version 2.0.0.0".

To access your Patient/Athlete Portal you will need to open up a browser (Chrome, Edge, Safari work best) and type in the address.

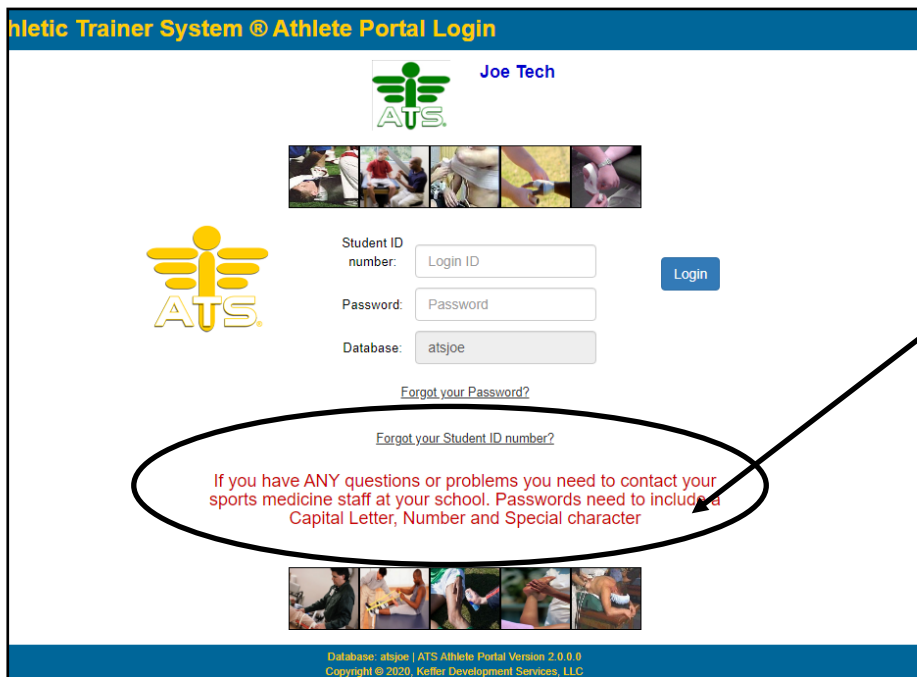
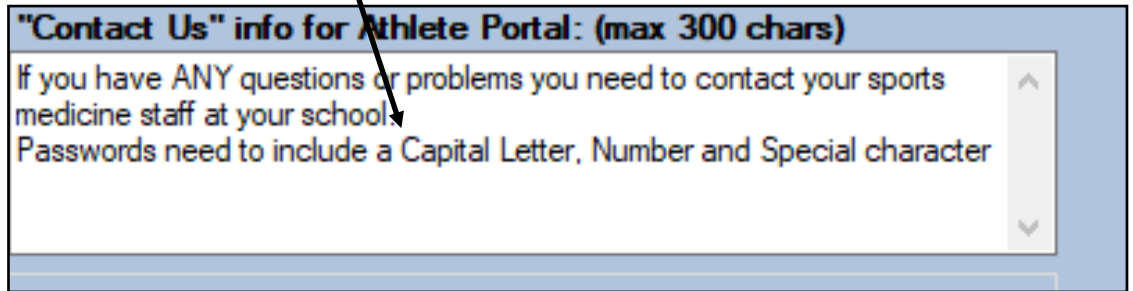
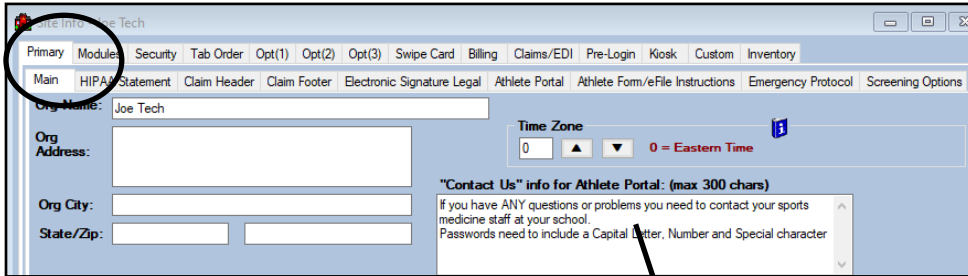
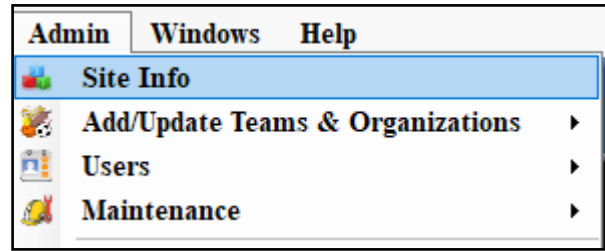
DO NOT use www. If you did use WWW please make sure you clear your browser history or it will continue to fill in the incorrect database.

Enter XXX2.atsusers.com (**the XXX = your database name**). When the page loads you should see your School/Organization name and logo at the top and your database name should already be loaded into the database box.

**We recommend creating a fake/test athlete to sign into the Patient/Athlete Portal with to test your settings, set up and to see what your student athletes will be seeing.*

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The first steps of the Athlete Portal set up are done in the Site Info area. To access Site info select Admin—> Site Info. Once in the Site Info area we will start on the Primary tab, main sub tab.



Place a message here for your athletes to see. It can be contact information, or anything you feel necessary. There is a 300 character limit. This message becomes visible on their login page.

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The next area in Site Info is the Primary tab —> Athlete Portal Sub tab. This tab allows you to make selections about some of the information that you wish to collect, set areas as required and some appointment request settings. If you want to turn on a function/setting in this area place a check mark in the corresponding box. If there are areas you are not going to use remove the check mark and that will disable that specific function or area.

*Be sure to Save your selections. If you are logged into the athlete portal prior to a change being made you will have to log out and then back in to see the changes.

Primary Modules Security Tab Order Opt(1) Opt(2) Opt(3) Swipe Card Billing Claims/EDI Pre-Login Kiosk Custom Inventory

Main HIPAA Statement Claim Header Claim Footer Electronic Signature Legal Athlete Portal Athlete Form/eFile Instructions Emergency Protocol Screening Options

Options

- Initially show completed forms list? # Forms to show:
- Enable Athlete Form Edit in Portal
- Show Athlete Picture
- Show the "No Primary Insurance" prompt?
- Show the Race and Ethnicity fields on the main tab
- Show the Medical History tab for athlete information
Label for this tab:
- Allow athletes to add new insurance companies?
- Show the paperwork completed grid
- Show athlete physical entries
- Enable the "Verify" button for athlete forms
- Require a file type for eFiles uploaded by athlete
- Send athlete a confirmation after successful registration
- Add a copy of saved athlete forms to the eFiles area in PDF form
- Initially show available eFiles during the new/new process
- Allow printing of blank athlete forms
- Email confirmation to athlete upon form completion
- Allow athletes/contacts to enter vaccinations

Additional

Custom Team Choices

1st Label
2nd Label
3rd Label

Required Sections - Athlete Information

- Immunizations
- Emergency Contacts
- Insurance

Areas you can require, or skip.

Athlete Appointments

Allow appointment requests <= minutes prior

Block appointments From: CL To: CL

Appointment Request Instructions:

When booking appointments, please select the athletic trainer responsible for your team. Choose ONE(1) appointment per day, and no more than ONE(1) day in advance. Do not book appointments for the future, they will be removed to allow everyone a chance to have access.

Additional Options

- Allow athlete forms via the athlete phone
- Allow multi team selection
- Enable the "Athlete See" Functionality
- Disable athlete ability to delete insurance entries
- Disable the New/New registration function

Save Close

Patient/Athlete portal settings. This allows you to control the content that they can see and input from the portal. This area is configurable for your organization.

Specific functionality of the portal. Allow form access on the phone, allow to pick multiple teams, allow them to see records you mark, disable the ability to delete insurance records, or disallow the portal registration, only allow them to log in once they have an account created by staff.

Appointment instructions, and times the appointments can be blocked to and from. For more information see the help doc, [Scheduling Overview](#)

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Including instructions here, you are able to list specific instructions for the patient/athletes to view on the portal for, the Forms Area, eFile tab, as well as the insurance tab. These come with stock information included, but can be customized to fit your needs.

This area is for any instructions you wish to be visible on the forms and eFiles tabs of the Athlete

Insurance card images, will display on the insurance tab in the patient/athlete portal. This will allow you to include any specific instructions, reminders or any other messages they are submitting copies of their insurance cards.

Primary Modules Security Tab Order Opt(1) Opt(2) Opt(3) Swipe Card Billing Claims/EDI Pre-Login Kiosk Custom Inventory

Main HIPAA Statement Claim Header Claim Footer Electronic Signature Legal Athlete Portal **Athlete Form/eFile Instructions** Emergency Protocol Screening Options

Athlete Forms Tab 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.
<http://www.athletictrainersystem.com/>

Athlete eFile Tab Instructions
Please utilize these forms to expedite your physical.
Print them off, complete the form and upload a copy back onto ATS.
Please also submit any Sickle Cell information, ADD/ADHD paperwork or other necessary medical forms.

Athlete Insurance Card Image Instructions
Make sure this image is of your insurance card only and can be read easily. Files must be < 1mb in size and type .jpg, .png, .bmp or .gif.

Save Close

Hide 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.
<http://www.athletictrainersystem.com/>

Make sure this image is of your insurance card only and can be read easily. Files must be < 1mb in size and type .jpg, .png, .bmp or .gif.

Upload

Upload Card Images

Card Front (size 2" high x 3" wide)

Electronic Files

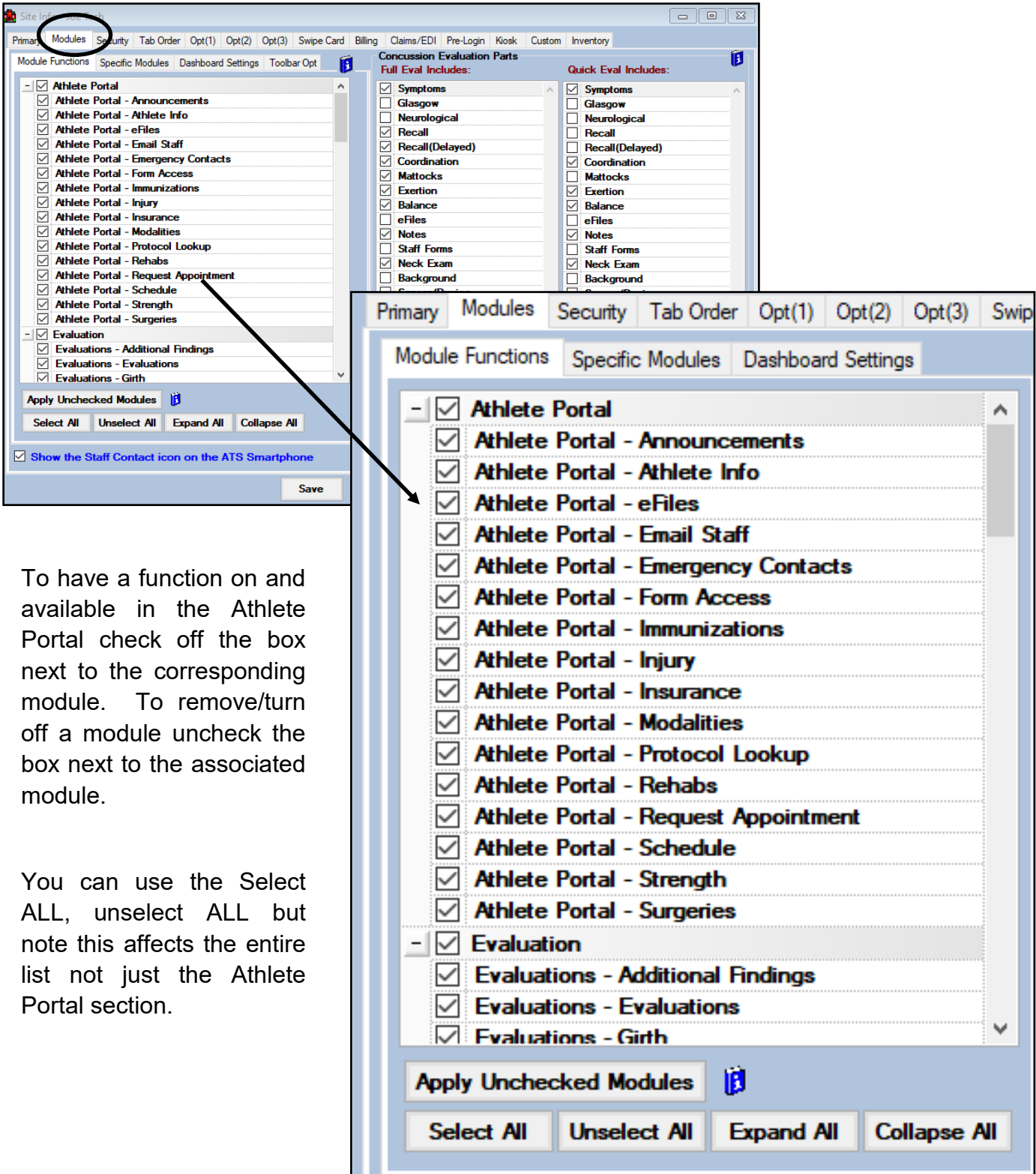
Electronic Files uploaded by the athlete. Upload Document

Please utilize these forms to expedite your physical. Print them off, complete the form and upload a copy back onto ATS. Please also submit any Sickle Cell information, ADD/ADHD paperwork or other necessary medical forms.

Electronic Files provided by the athletic training staff.

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The next area in Site Info that needs to be addressed is in the Modules Tab. The left side of this screen is where you control which functions of the athlete portal you want turned on.

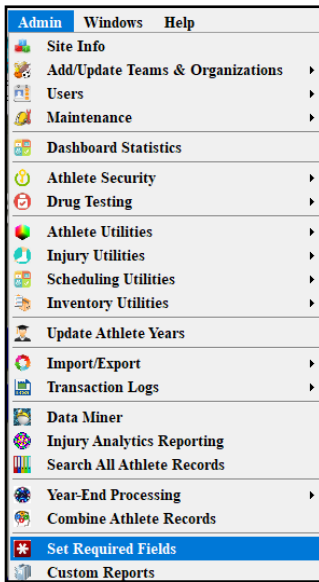


To have a function on and available in the Athlete Portal check off the box next to the corresponding module. To remove/turn off a module uncheck the box next to the associated module.

You can use the Select ALL, unselect ALL but note this affects the entire list not just the Athlete Portal section.

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The last area in the Desktop Program you should visit when setting up your Athlete Portal is the Setting Required Fields area. Admin—> Setting Required Fields.



Field	Staff	Athlete	Required By ATS
- TableName: injury			
Injury Date	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Injury Desc/How	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Event Type/Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Injury Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mechanism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Body Part	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Injury Report Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Injury Report Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Severity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Injury Specific Mechanism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Status	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Playing Surface	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Injury/Illness 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Injury/Illness 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Injury/Illness 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Happened During	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insurance Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Side Indicator	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Athlete Name	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Team/Sport Name	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Staff Member	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+ TableName: Person			
+ TableName: personemergency			
+ TableName: personinsurance			

Buttons at the bottom: Print List, To Excel, Save, +, -, Close

This area allows you to mark specific areas of information to be required, meaning they will be unable to save the entry they are working on until all the required information has been filled in. To make information required on the Patient/Athlete Portal you want to mark the box in the Athlete Column for that particular piece of information. You can also make areas required for Staff but that does not apply to the Athlete Portal. Areas you can make information required in: Injury documentation, Person demographics, Emergency Contact info and insurance information. For more on setting required fields, please view the [Setting Required Fields](#).

ATS: How to Set up the Athlete Portal

This is just an overview of the areas you need to visit to get your Athlete Portal set up. For more information on the Athlete Portal, its functions and capabilities please see the following documents and videos:

Athlete Portal Overview— [help doc](#)

Athlete Form Creation— [Help doc](#) & [video](#) & [Overview](#)

Tracking paperwork and forms— [Linking eFiles](#), linking [athlete forms](#)

Loading Files to the Athlete Portal for athlete to see/download click [here](#)

Setting up Electronic Signatures for Athlete click [here](#)

Creating custom fields click [here](#)

How athletes access the Athlete Portal for the first time (If they are not already in your ATS database) - the [new/new process](#)