Account Setup Table of Contents:

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.

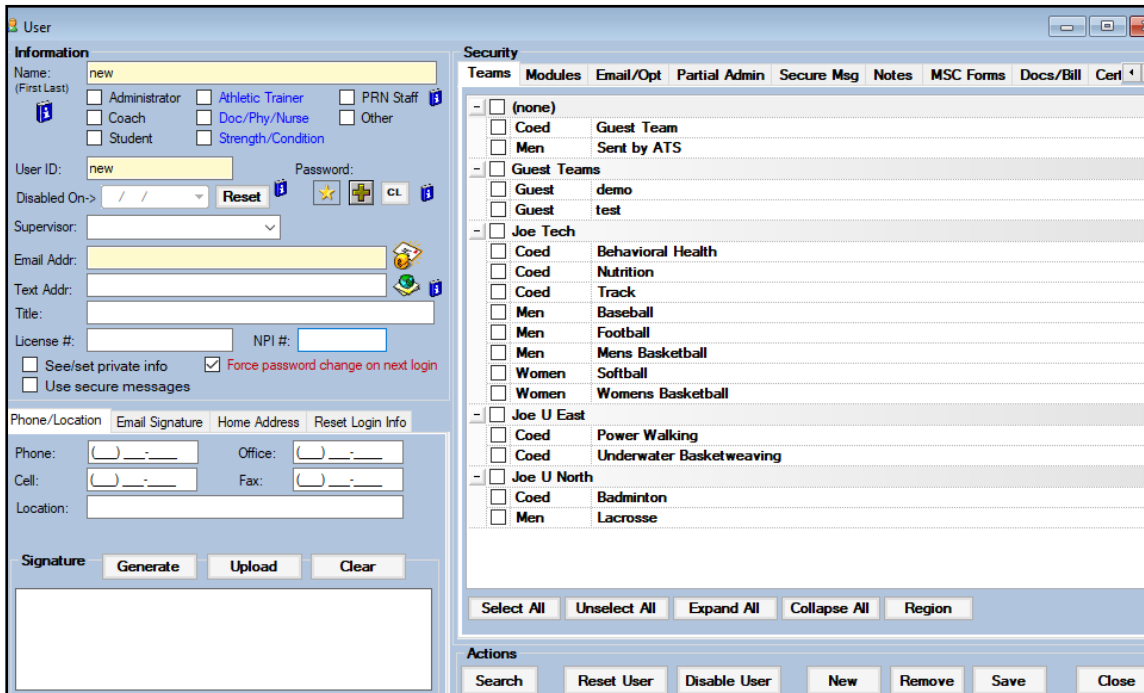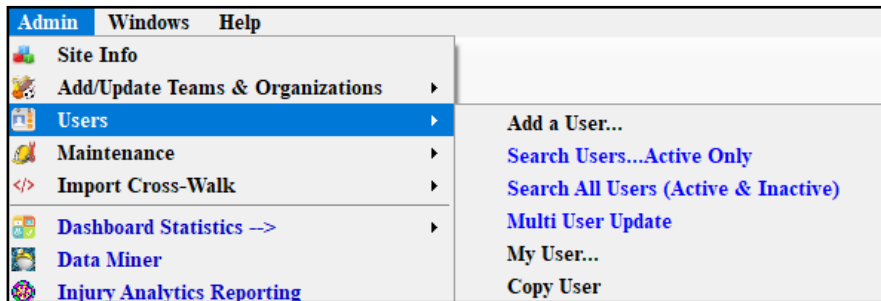To add a user navigate to the sub-menu and select Add a User.

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

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:

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.

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: allows the user access to private information. See the Private Info Doc for more information.

Use Secure Messages: Allows the user access to send/ receive secure messages in ATS. See Secure Message 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.

Explanation of User Information Screen:

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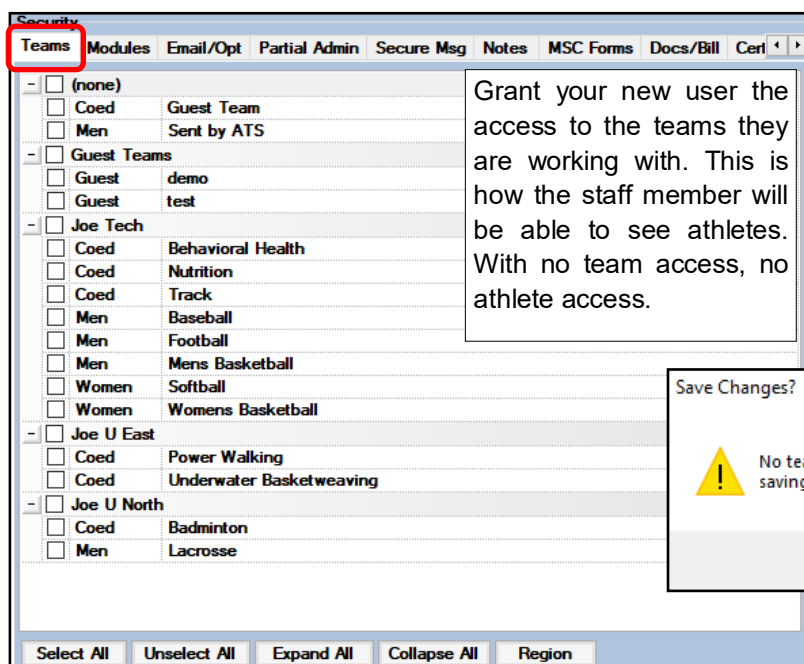
Email Signature: Allows you to add a signature for any email you send from ATS.

Home Address: Gives you a place to store your emergency contact information.
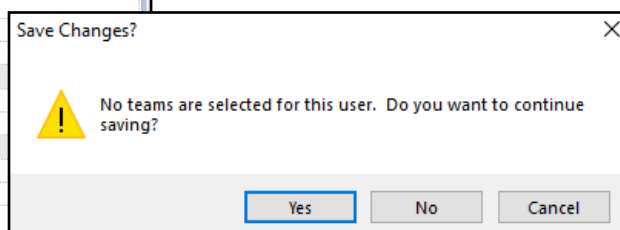
Reset Login Info: Allows you to select from the list of questions provided and provide answers. This allows you the ability to unlock your disabled account should you forget your password and try too many times. For more information on the process, please see the Rest Process help doc.

ATS– User Account Setup

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.

Grant your new user the access to the teams they are working with. This is how the staff member will be able to see athletes. With no team access, no athlete access.

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

Save Changes?

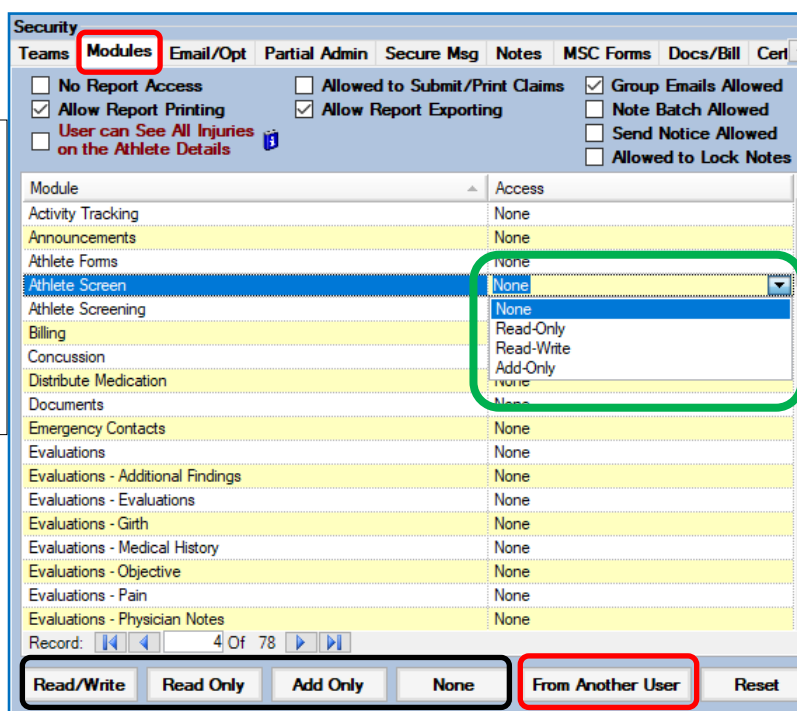No teams are selected for this user. Do you want to continue saving?

Yes   No   Cancel

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

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 Site Info.

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.
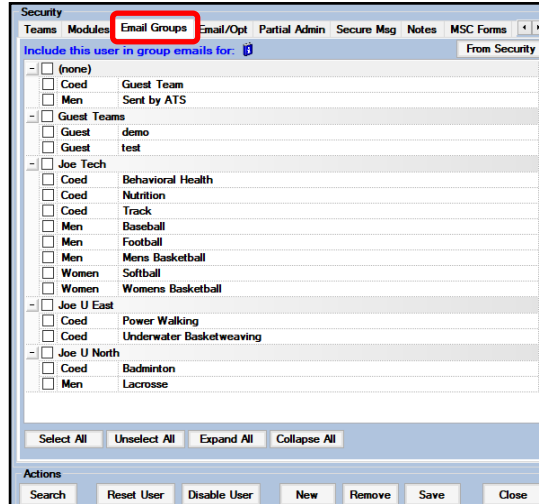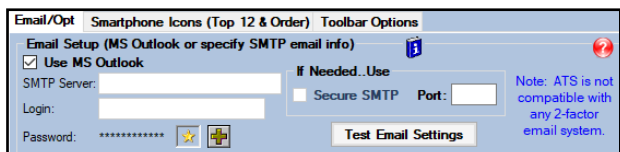

User Setup— Email/Opt:

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.
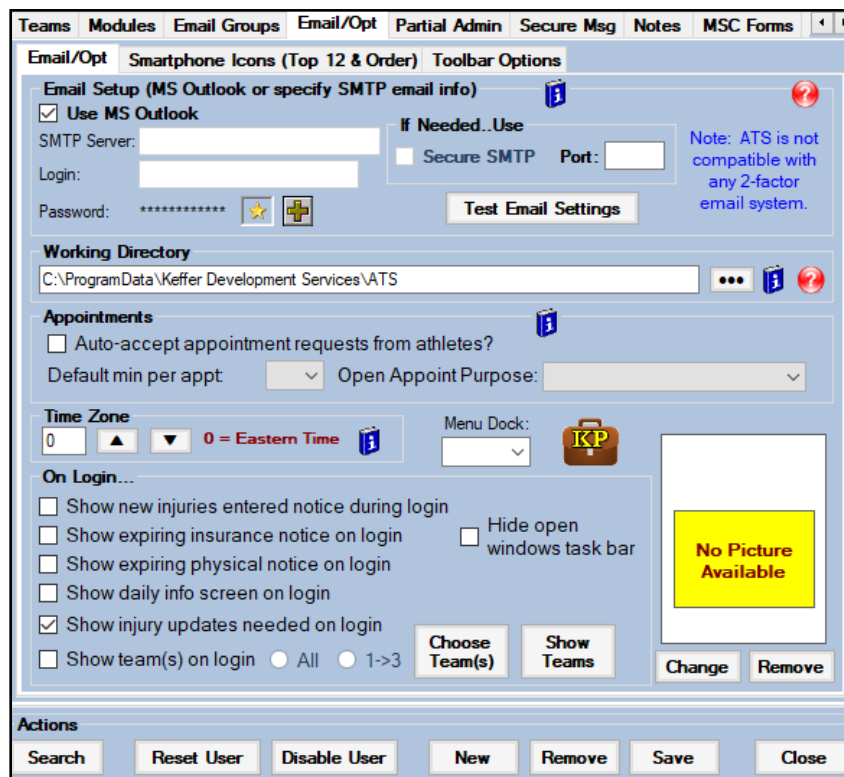
User Setup— Email/Opt Explained:

Email Setup— This area allows you the ability to set up your email information so you can email from ATS. Use the Test Email button after setting up all of the information below.

**SMTP** server– is the email server that you are using.
**Login**– your email account
_**Password**_– email account password
**Secure SMTP**– mark yes or no to it being a secure server
**Port #**— may be given to you in your account settings, you may also have to contact your IT staff to gain more information
We can assist you, but most of this information will come from your IT department, or your individual email account settings.
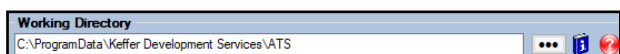
Working Directory— Place for reports and other temporary files to be stored… emptied when you log out. More info on how to set it up is available here.
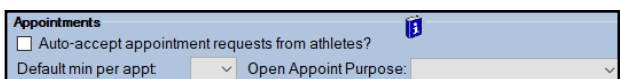
Appointments— Coincides with the scheduling with appointments for athletes to book with you. This allows the system to automatically remove the available appointment and set your default personal appoint time and purpose. For more information see the Scheduling help doc.
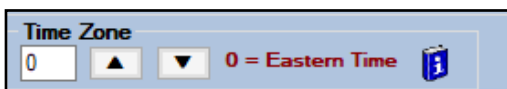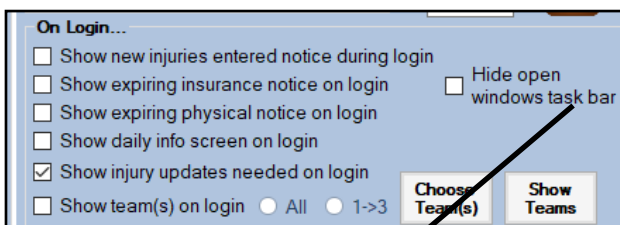
Time Zone— Set the time zone for your account based on where you are located. Eastern time is 0, Central time is –1, Mountain time is –2, Pacific time is –3. This affects report printing time as well as appointments showing correctly.
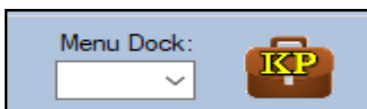
Menu Dock— You can move the top menu of ATS if you would like to.

KP— 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 Key Phrase help doc for more information on making and how to use them.

On Login— 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.

Hide open windows task bar— 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.

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.

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.

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.


This list corelates to the Admin Tab. Use the features in the menu and submenu to assign appropriate access for your users.
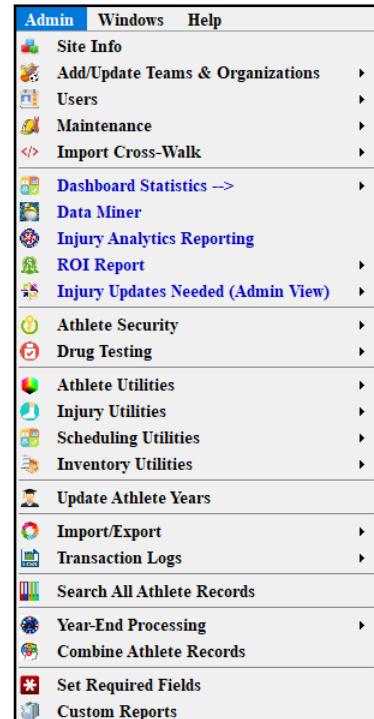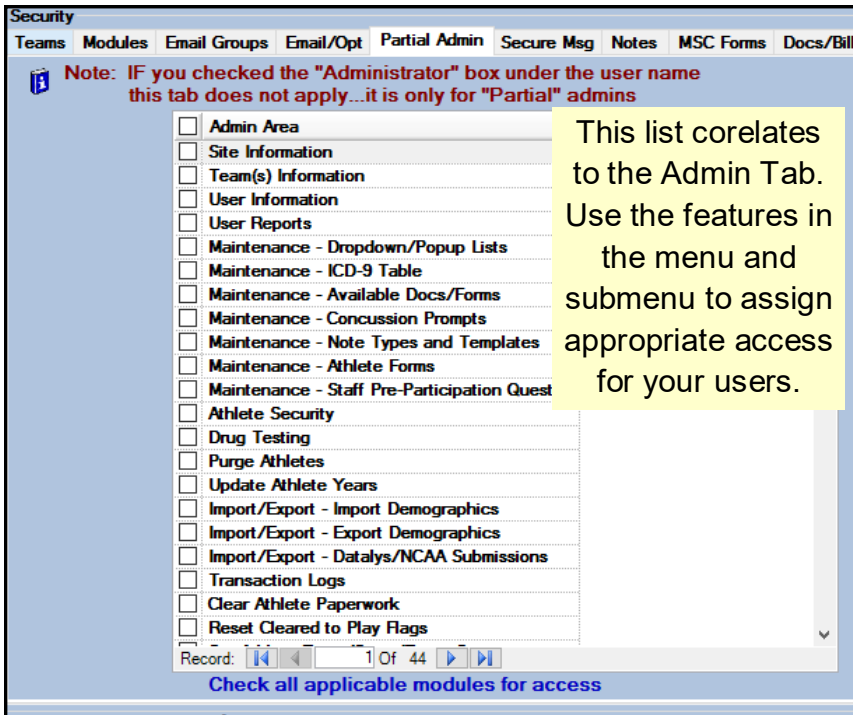
Secure Message tab:

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 Secure Message doc.

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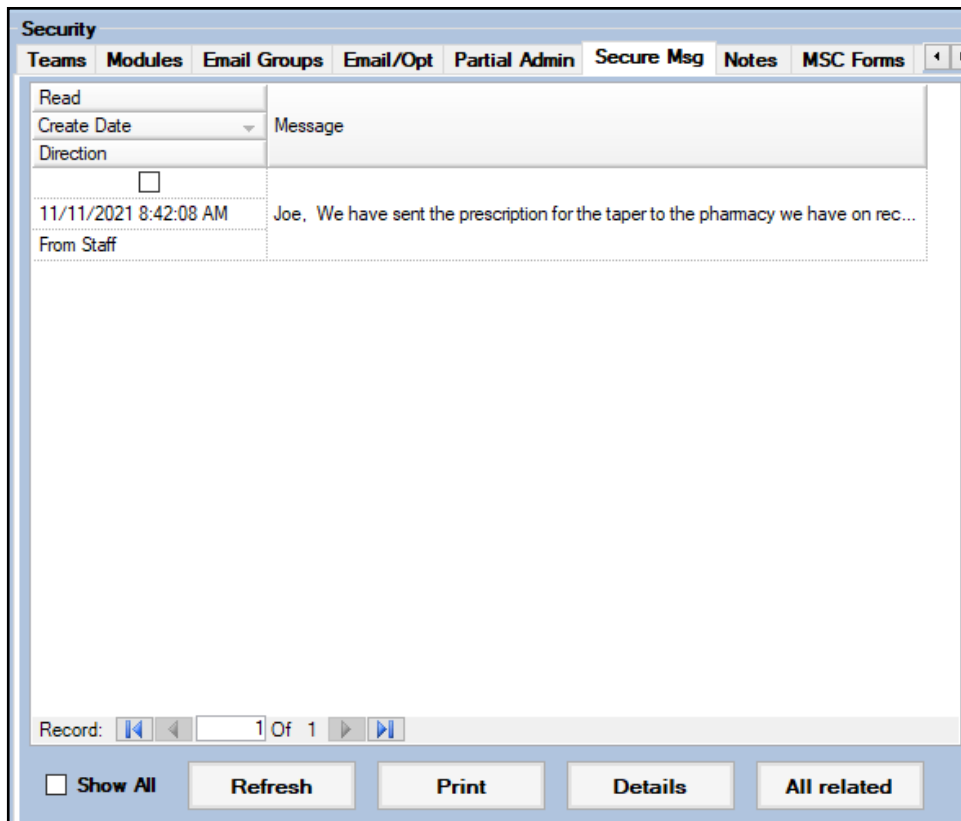
Notes Tab:

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.
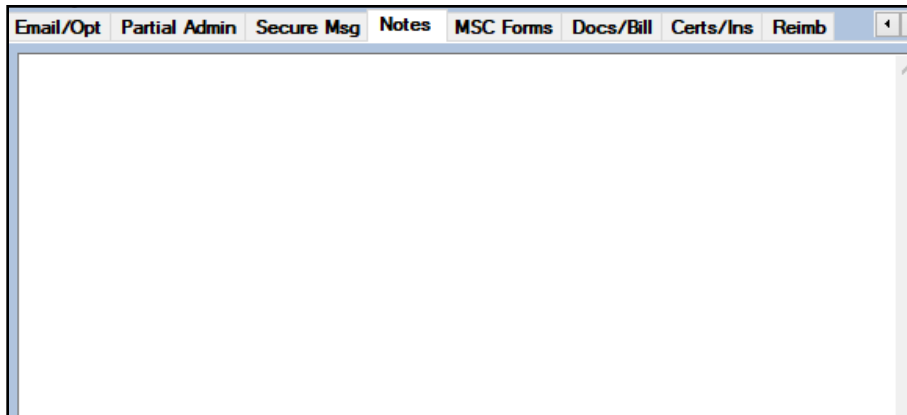
MSC Forms Tab:

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 MSC help doc for more info.
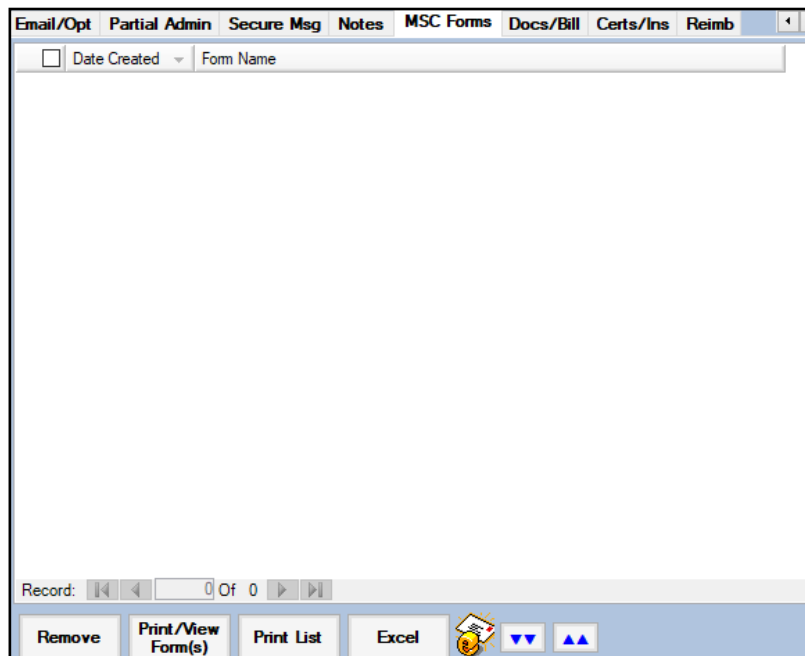
Docs/Bill:

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.

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.

Reimbursement Tab:

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

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.
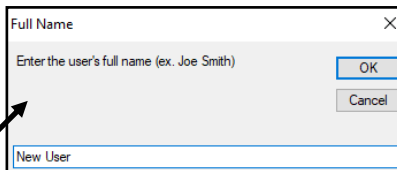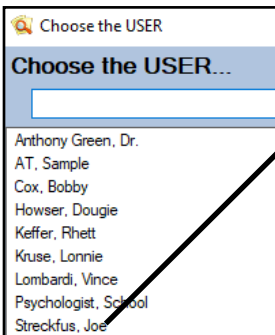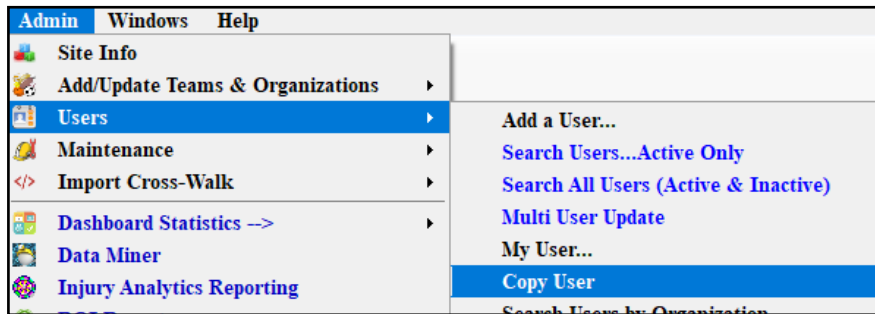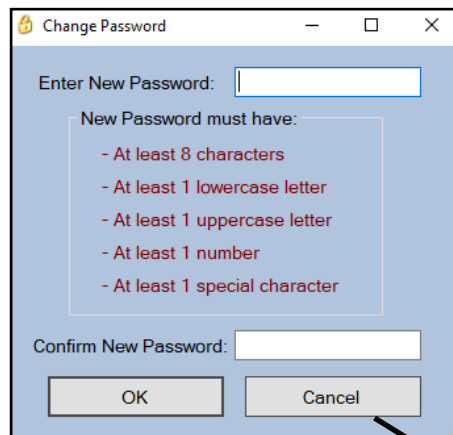

Enter the User's Full Name.
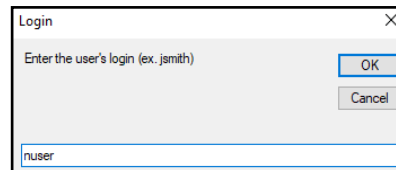
Enter the User's login ID.

Choose the user you would like to copy. Again this will copy many of the features from the user.

Enter a temporary password for the new user.

After you enter the password, the user screen will open and you will need to enter the users email address. You can change any other access or manipulate the user if needed. You should also check the box for the "force password change on next login".
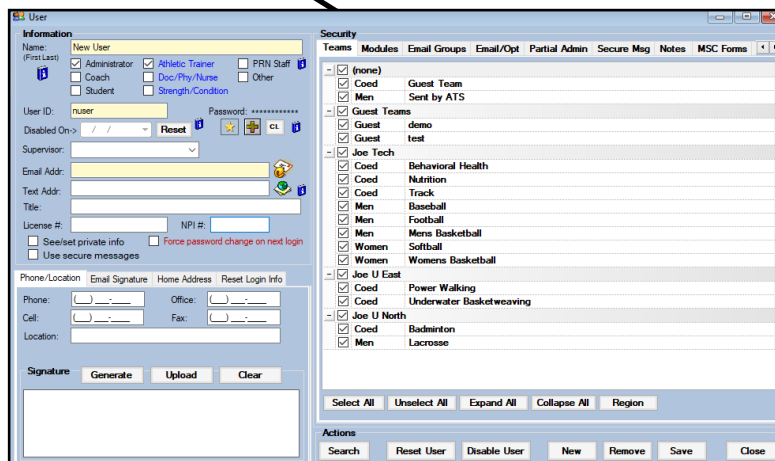
Editing Existing User Accounts:

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 Key Phrases from the master list that is created in site info.
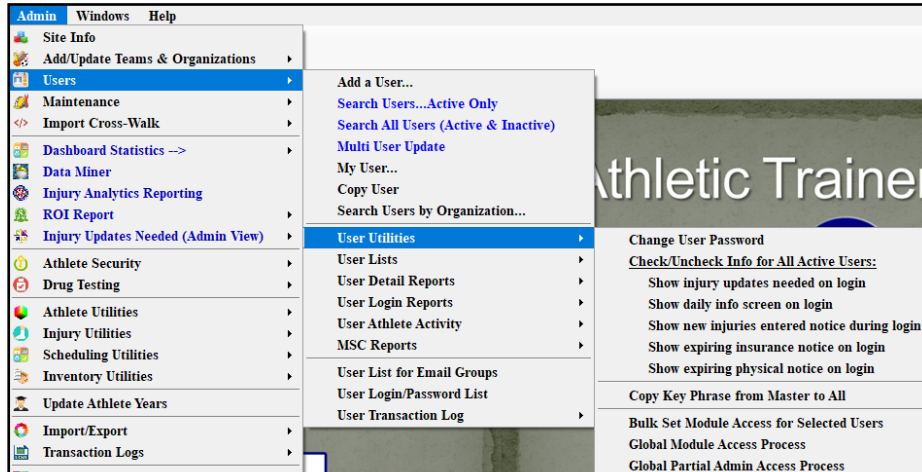
Multi-User Update:

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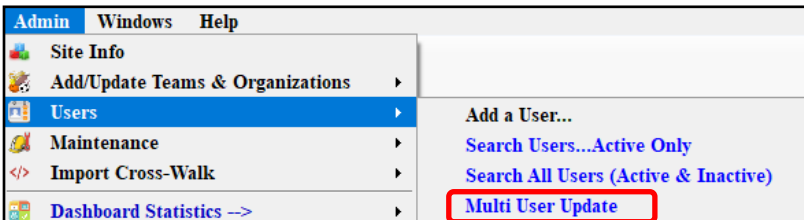
Use the blue buttons at the bottom left of the screen, to scroll profiles. You can change many of the options for the staff member.

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