

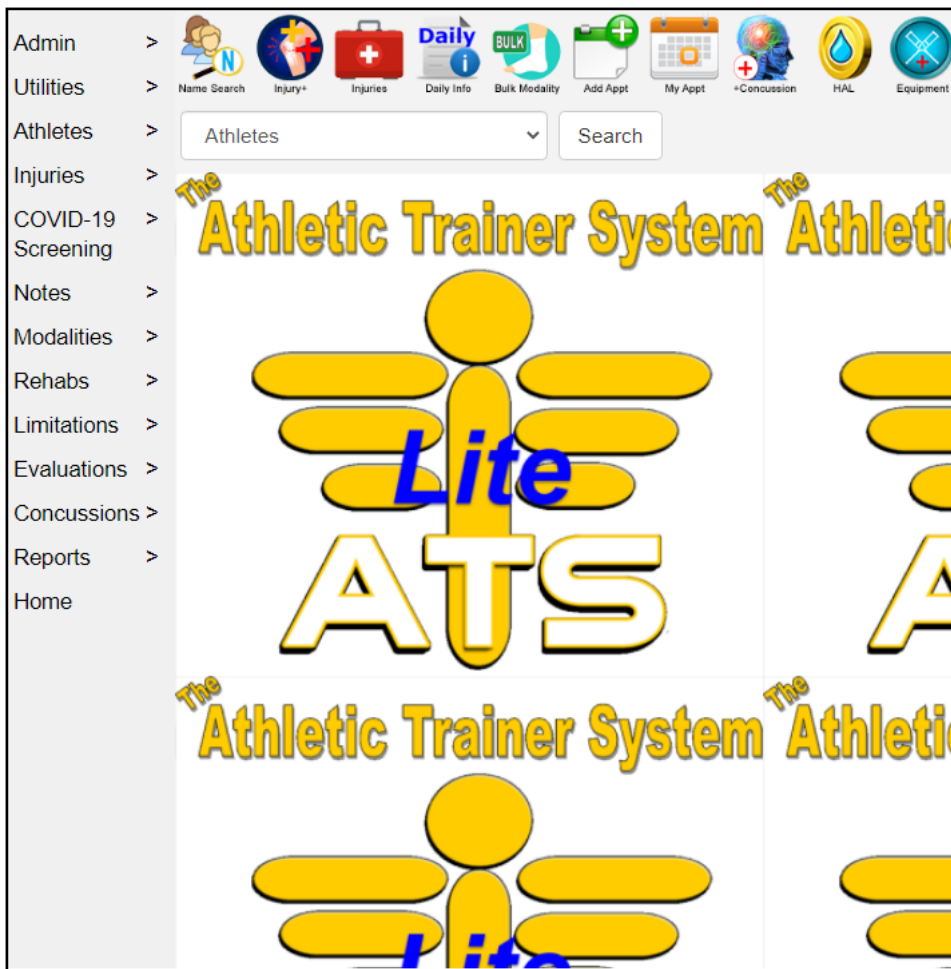
## ATS Lite Getting Started

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ATS Lite was designed for you to be able to quickly be up and running with minimal additional customization. There are many areas that you can customize and refine further to fit your documentation and organization needs.

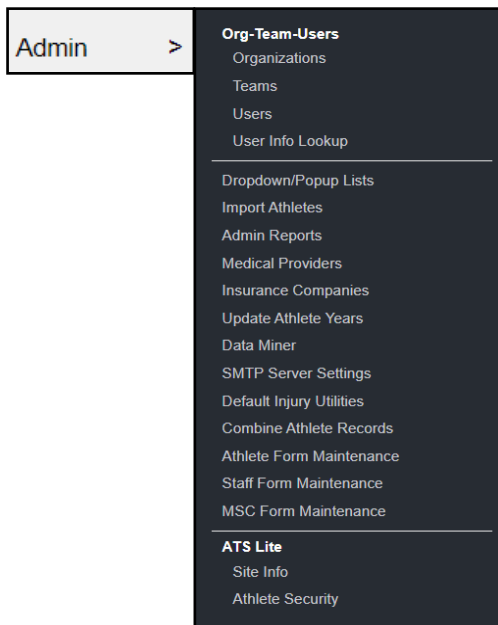
This doc will help you get setup and customize the areas available with ATS Lite.



Once you are logged in, you will see the menu on the left hand side. You will utilize the options there to add athletes, interact with them and document their care.

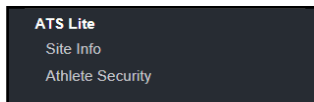
## ATS Lite Admin:

After you first get logged into ATS, you will need to go to the Admin tab. This is where you will build your organizations if necessary, teams, customize your list items, and set up the limited Site Information area, among others.



## Site Info:

ATS Lite has a limited site information area that you are able to set for your Organization/School.



**Site Info**

|   |   |
|---|---|
| <p>Org Name <input type="text" value="ATS Lite Demo"/></p> <p>Org Address <input type="text" value="Org Address"/></p> <p>Org City <input type="text" value="Org City"/></p> <p>State/Zip <input type="text" value="Org State"/> <input type="text" value="Org Zipcode"/></p> | <p>Time Zone <input type="text" value="(UTC-05:00) Eastern Time (US &amp; Canada)"/></p> <hr/> <p>Calendar Year</p> <p>Starts <input type="text" value="07/01/2022"/></p> <p>Ends <input type="text" value="06/30/2023"/></p> |
|---|---|

The top section allows you the ability to set your organizations name, and mailing address. As well as set your time zone and master calendar.

The Additional Name Labels allows you the option to have customized labels for your athletes, whether this their preferred name, nick name, or their pronouns, you have the flexibility to use these as you need. Click the blue information icon for more information.

**Additional Name Labels**

|  |  |
|--|--|
| 1st <input type="text" value="NickName"/>      | 2nd <input type="text" value="2nd Add'l Lbl"/> |
| 3rd <input type="text" value="3rd Add'l Lbl"/> | 4th <input type="text" value="4th Add'l Lbl"/> |

The graphic area, allows you the ability to change the background and the report logo to a school image, or other image you would like to have.

**Graphics**

Report Logo  Wallpaper

No file chosen

Size: 1 in X 1 in

Recommended Size: 700 pixels X 400 pixels

## Team Setup:

Before you are able to add athletes, you have to have to create teams to place them on. All athletes entered in ATS must be tied to at least 1 active team. Athletes can be on as many rosters as needed.

Go to the Admin tab—> select Teams.

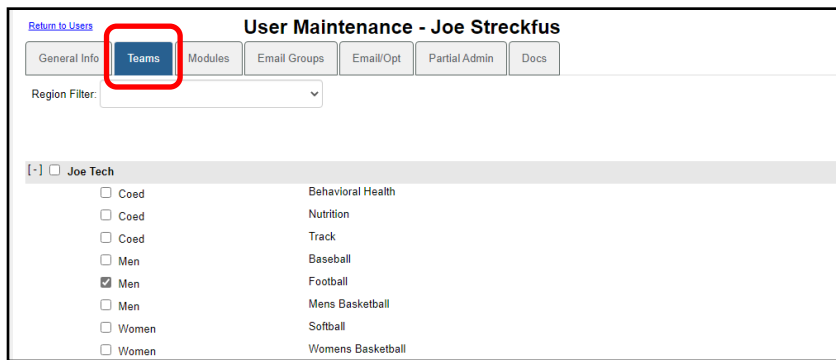
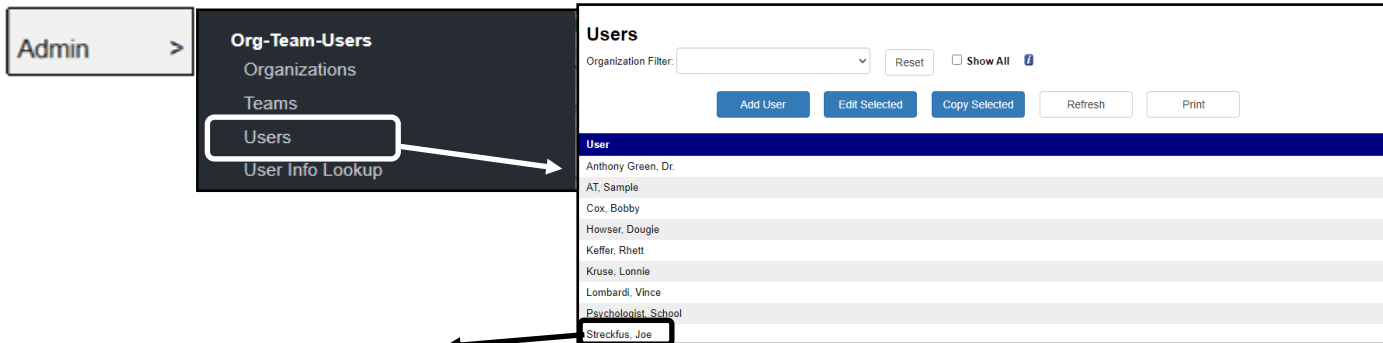
Select the Add Team button.

To add teams, you are required to enter basic information. The requirements are (circled in red), Sport name (Football, Basketball etc.), gender which can be customized (will be covered on page \_\_\_\_\_), the season it corresponds to, your abbreviation and to make sure there is a check mark in the Active Check box. The remainder of the information on the team page is optional.

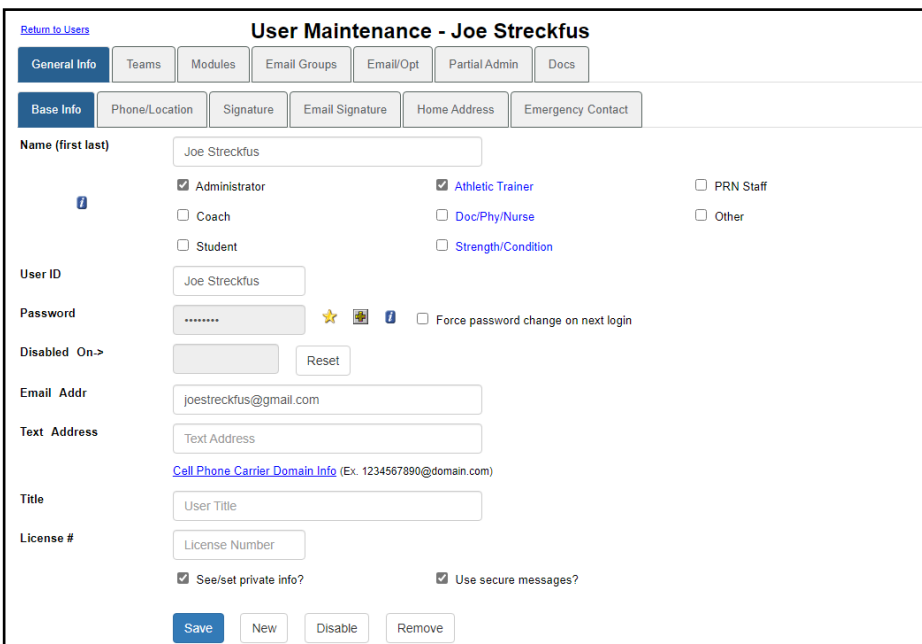
Repeat the process for the remainder of your teams until you have entered all of your schools teams.

## User Information:

After building your team list you are ready to edit your user information. You MUST visit your user profile before attempting to add athletes, you need access to the teams you created. From the Admin Tab select users. Select your name from the list.



When you open your user profile, select the Teams tab. You will see the new teams you created without check marks. A check mark means you have permission/access to the team. Grant yourself access to the teams, this will let you see who is on those teams, as well as add new or run the import process.



Navigate the remainder of the tabs, and complete any of the other optional information.

## Adding Athletes:

Utilizing the ATS LITE, there are several way to get athletes into your database.

1. Manually Add
2. Utilize our Standard Import via Excel .xlsx file
3. Set up an nightly sync with rSchool Today

## Manually Adding Athletes:

To add athletes on an individual basis, select the athlete tab and select either the Add New Athlete, or Quick Athlete Add

The screenshot shows the 'Athletes' menu with three options: 'Add New Athlete', 'Quick Athlete Add', and 'Search For Athlete'. Below the menu are two forms:

**Enter Athlete Form:** This form has tabs for 'Athlete', 'Teams', 'Address', 'Other', 'Communications', 'Additional Info', 'Academic Eligibility', 'Photo', and 'Medical'. The 'Athlete' tab is active. Fields include: Name (First Name, MI, Last Name), NickName, Phone, Gender (dropdown), Year, Email, Athlete ID (with Generate button), Archived? checkbox, Password (with Generate button), Force Password Change? checkbox, and checkboxes for 'Mark for Review?', 'Paperwork Complete?', and 'Cognitive Concuss C'.

**Quick Athlete Add Form:** This form is a simplified version with fields for: Name (First Name, MI, Last Name), Nickname, Year (dropdown), Gender (dropdown), DOB, Email, Athlete ID, Password, Team (dropdown), and Status (dropdown). It includes 'Save' and 'New' buttons.

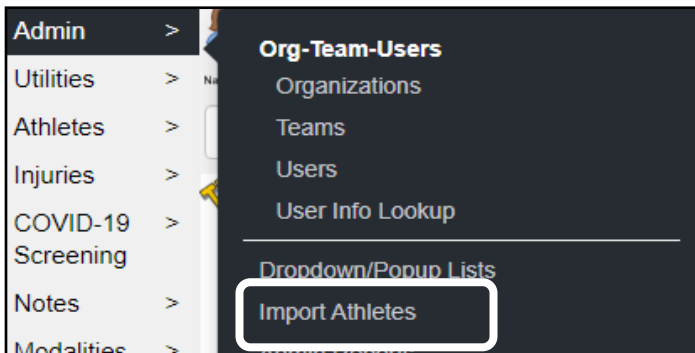
The Add Athlete (Enter Athlete) option on the left, allows you to enter more details about the athlete. The Quick Athlete Add, on the right, allows you to add a new athlete with only the basic information needed to create a profile.

As with other screens, the yellow fields are the required data entry areas.

## Importing Athletes:

With ATS, you also have the option to do an import of athletes directly in vs. manually entering their information, using a .XLSX format. This does require you to utilize our template to import to ensure information is imported correctly. If you have the information in another excel spreadsheet, a google sheet, or other format, you will need to copy and paste the information into the template.

For further explanation of the import process and how it works, please utilize the [Import Athletes](#) help file and template.



## rSchool Today with ATS LITE:

If you are already an RST client, you can set up a sync with them to import athletes directly from their management platform into ATS.

You will need to have the full version of the Activity Scheduler from RST. There are some other associated fees from RST. There is not extra cost from ATS.

If you would like more information or to get this set up with ATS LITE you will need to call us to help get this set up and configured.

**1-888-328-2577 or email [support@kefferdevelopment.com](mailto:support@kefferdevelopment.com)**

## Medical Providers:

One of the options in ATS Lite you can customize to use is the Medical Provider list. This area is where you would enter physicians you may be referring your athletes for further care. You are able to enter Provider Clinics/Hospitals and the Physicians under the umbrella.

The image shows two parts of the ATS Lite interface. On the left is the 'Admin' sidebar menu with 'Medical Providers' highlighted. On the right is the 'Medical Provider Maintenance' form. Red boxes highlight the 'Provider Name' field and the 'Status' dropdown menu. A blue arrow points from the 'Medical Providers' menu item to the 'Status' dropdown in the form.

This screenshot shows the 'Medical Provider Maintenance' form with the 'Provider Name' set to 'Orthopaedic Clinic'. The 'Performed By Entries' tab is active, showing a list of providers: 'Doctor James Smith' and 'Doctor Wile Coyote'. A yellow box highlights the 'Add Entry' button, with a yellow arrow pointing to the 'Add Performed By Entry' dialog box shown in the next image.

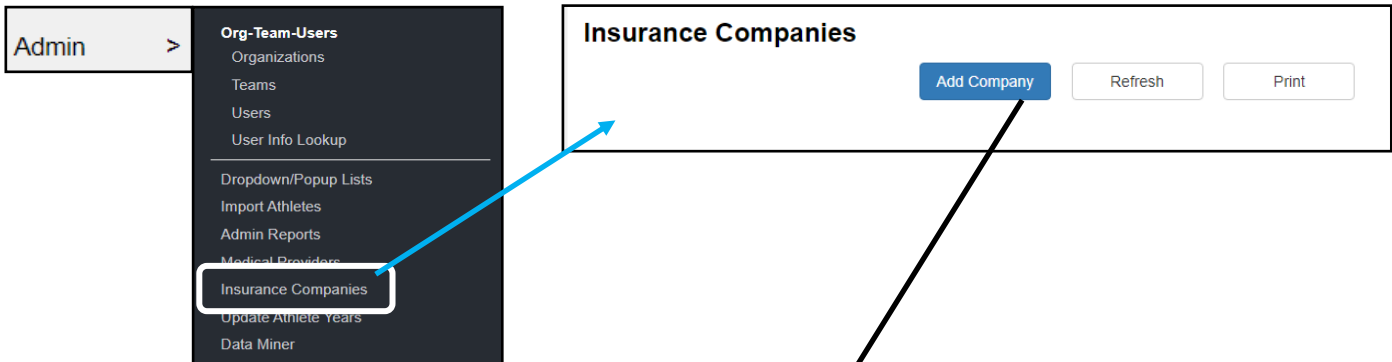
Use the Performed By Entries to add the specific physicians you may refer to

The dialog box titled 'Add Performed By Entry' contains a text input field labeled 'Performed By:' and 'Save' and 'Cancel' buttons.



## Insurance:

You are able to track the Athlete Insurance with ATS Lite. Before you do that, you will need to add specific companies to the database. To begin adding you will need to go to Admin—> Insurance Companies.



Required information is Company Name and to make the entry Active. The remainder of the info is optional.

[Return to Insurance Companies](#)

### Insurance Company Maintenance

**Company Information**

Company Name   Is Active

Address

City

State

Zip

Phone

Fax

Web Site

**Contact Information**

Contact Name

Phone

Email

**Billing Information**

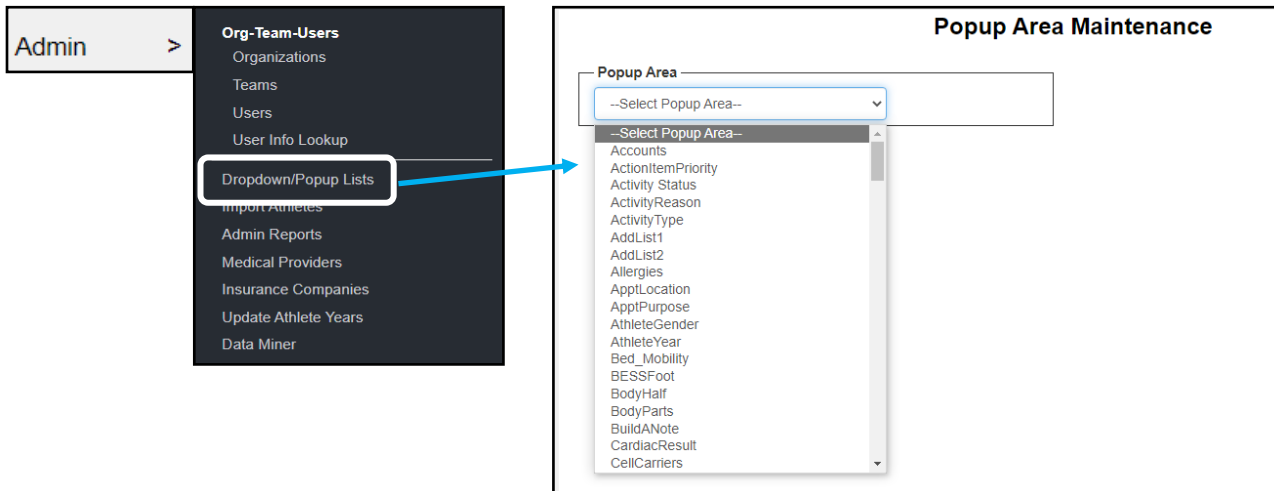
Billing Code

**Notes**

Notes

## Customizing Dropdown Lists:

ATS Lite is designed to limit the amount you need to customize before being able to utilize the program. However, we understand you may want to change the name of a modality, or exercise that comes pre-loaded or you may not have that machine or you want to change the classification of athlete years. You have the freedom and flexibility to change those entries.



After you select the Dropdown/popup lists menu item, it will take you to the maintenance screen. Here you can select any list you wish to edit, whether that is the athlete years, gender, rehab exercises or modality lists. This area allows you to modify the info in the database to fit your needs.

To edit the entry, find the area you want to edit in list and select that.

Popup Area

AthleteYear

Add
Edit
Delete
Copy
Refresh
Scroll Down
Scroll Up

| Description | Abbrev    | Import/Sync | Sort | Active | Last Used | Athlete See |
|-------------|-----------|-------------|------|--------|-----------|-------------|
| Freshman    | Freshman  |             | 1    | Yes    |           | Yes         |
| Sophomore   | Sophomore |             | 2    | Yes    |           | Yes         |
| Junior      | Junior    |             | 3    | Yes    |           | Yes         |
| Senior      | Senior    |             | 4    | Yes    |           | Yes         |
| Grad 2019   | Grad 2019 |             | 11   | Yes    |           | Yes         |
| Grad 2020   | Grad 2020 |             | 11   | Yes    |           | Yes         |
| Grad 2021   | Grad 2021 |             | 11   | Yes    |           | Yes         |
| Grad 2022   | Grad 2022 |             | 11   | Yes    |           | No          |

Use the add/edit/delete/copy buttons to manage your list items.

When first setting up your database, is the only time you should delete any entry.

For more detailed information, please review the [dropdown/popup](#) list help doc.

## Default Injury:

The Default Injury is designed to allow you to document non-injury related treatments so you can have accurate treatment information entered. This is also helpful when utilizing the Kiosk. ATS does require all modalities or rehabs to be tied to an injury. Utilizing the default injury, gives you a place to track taping, hot packs, whirlpools for soreness.

The default injury is designed to be assigned 1 time.

The image shows two parts of the software interface. On the left is the 'Admin' menu, which is a dark sidebar with a light 'Admin' header and a right-pointing chevron. The menu items are: 'Org-Team-Users' (with a sub-menu: 'Organizations', 'Teams', 'Users', 'User Info Lookup'), 'Dropdown/Popup Lists', 'Import Athletes', 'Admin Reports', 'Medical Providers', 'Insurance Companies', 'Update Athlete Years', 'Data Miner', 'SMTP Server Settings', 'Default Injury Utilities' (highlighted with a white box and a blue arrow pointing to the right), 'Combine Athlete Records', and 'Athlete Form Maintenance'. On the right is a window titled 'Default Injury Utilities'. It has a label 'Utility' on the left and a dropdown menu on the right. The dropdown menu is currently open, showing a list of options: '-- Select a Utility --', 'Add Default Injury for All Athletes', 'Add Default Injury for All Athletes on a Team', 'Add Default Injury for an Organization', 'Remove Default Injury for All Athletes', 'Remove Default Injury for All Athletes on a Team', and 'Remove Default Injury for an Organization'.