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.

# **ATS**— Year End Processing

# Year End Processing

# Table of Contents:

Task	Page	Video Link if Available		
Clear the Athlete Paperwork Flag	<u>3</u>			
Reset Paperwork Completed Flag	<u>Top 4</u>			
Clear Athlete Paperwork Verified Flag	Bot 4			
Reset/Clear/Set Cleared to Play	<u>5</u>			
Clear Clearance Notes	<u>Top 6</u>			
Set Athlete Team/Sport/Event Status	Bot 6			
Reset the Cognitive Concussion Flag	<u>Top 7</u>			
Reset the Academic Eligible Flag	<u>Bot 7</u>			
Reset Verified Date for Athlete Records	<u>8</u>			
Other Recommended End of Year Clean Up				
Update Athlete Year Popup	<u>Top 9</u>			
Update Athlete Years	<u>Bot 9</u>	Update Athlete Year Video		
Disable Old Users	<u>10</u>	Disable Old Users Video		
Resolve Current Injuries	<u>Top 11</u>			
Turn Off Batch Reports	<u>Mid 11</u>	Batch Reports		
Disable Nightly Reminders	<u>Bot.11</u>			
Update Athlete Insurance	<u>Top 12</u>			
Update System Calendar	<u>Bot 12</u>			
Force Password Change	<u>13</u>			
Video Walk Through: <u>Year End Processing Menu</u>				

### **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
<b>Clear Athlete Paperwork Verified Flags</b>	•	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 Questionaire				
Certification				
Physical Form	$\checkmark$			
Previous Injury History		01/10/18		
Health Habits				
NCAA Concussion Review				
Ashley U Sports Participation Agreement		05/10/18	$\checkmark$	
NCAA Concussion Fact Sheet for Student At	. 🗹	05/11/18		

### Create eFile Archive:



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.

#### \*\*\*\*<u>Again, this process must be done PRIOR TO RUNNING THE</u> CLEAR PROCESS.\*\*\*\*

lor

# **Reset Paperwork Complete Flag:**

Clear Athlete Paperwork Flags		
Reset Paperwork Completed Flag	•	For All
<b>Clear Athlete Paperwork Verified Flags</b>	•	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.

😫 Athlete - Davis, Crash					
	Archived	🗌 Cleared to Play 🛛 / 🗸 🔽	CTP Status: Cleared	~	
Name: Crash	Davis V	Team/Sport/Event	Status 🔺 Position/Dis	As Of CT	
(First) (IV	11) (Last) (Suffix)				
Nickname	Pronouns	Joe Tech Men Baseball	Active		
PreferName		Joe Tech Coed Behavioral Health	Active	10/4/2021	
Phone: 123456789	Year: Senior 🛛 🗸 🕂				
Gender: prefer not to disclose 🗸	DOB: 1/14/1998 🗸 CL			<b>&gt;</b>	
Email: joe@kefferdevelopment.co	om Age 23	Mark for review Pwk Comp	og Concuss Complete 🔋	Card View	
		Vaccinations Alerts/Notes Paperwork Alhiete Forms effiles Notes Paperwork Alhiete Forms effiles Notes Paperwork. Paperwork. Paperwork. Submitted Sub Baseline Concussor Insurance Card Back	nsure Emer Concuss Team ( bmit Date Verfied Comment Not	General Acad Elig Sick Cleared Mark as Cleared Print/View	Last Updated via Portal       Athlete Info:     9/7/2021       Surgery:     ///
		Insurance Card Front  Participation Form		Reset	Insurance: / / v Immune: 4/19/2021 v Contacts: / / v
		Record: I I Of 5 D C C C C C C C C C C C C C C C C C C	New Paperwork Set	> Remember to option under s	o run the "Check Complete" the \File\Utilities menu after aving your work. Paperwork "Check" Process
		💱 🧾 ன 🐖 🚺 器 🔿 Portal Logins 🕴	Prev Next Name:		Save Close

# **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.

Paperwork	Submitted	Submit I	te Verified	Comment
Ashley U Questionaire				
Certification				
Physical Form				
Previous Injury History		01/10/18		
Health Habits				
NCAA Concussion Review				
Ashley U Sports Participation Agreement		05/10/18		
NCAA Concussion Fact Sheet for Student At		05/11/18		
		•		

Tor

# ATS— Year End Processing

# 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 All to Cleared
Set Athlete Team/Sport/Event Status	•	Set Team to Cleared
<b>Reset Cognitive Concussion Flags</b>	•	Set Organization to Cleared

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

Top

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 Organzation

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



# ATS— Year End Processing

### **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"	•	For All
Set Athlete Team/Sport/Event Status	•	For Team
Reset Cognitive Concussion Flags	•	For Organization

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

Top

😫 Athlete - Davis, Crash	
	Cleared to Play / / v CL CTP Status: Cleared v
Name: Crash Davis V	Team/Sport/Event Status 🔺 Position/Dis As Of CTP Date Jerse # Clearance Notes F M
(Pirst) (Mil) (Last) (Sumx) Nickname Pronouns V	
PreferName	Joe Tech Men Baseball Active
Phone: 123456789 Year: Senior V	Joe lech Coed Benavioral Health Active
Gender: prefer not to disclose 🗸 DOB: 1/14/1998 🗸 CL	Record 14 4 10' 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Email: joe@kefferdevelopment.com Age 23	Mark for review Pwk Comp Cog Concuss Complete

# Set Athlete Team/Sport/Event Status:

Set Athlete Team/Sport/Event Status	•	For All	Using the Set team/sport/event status
<b>Reset Cognitive Concussion Flags</b>	•	For a Team	menu, you can set a status for the options
Reset Academic Eligible Flag	•	For an Organization	in the image. This allows you to activate,
<b>Reset All Medical Question Checkboxes</b>		For an Athlete Year	or inactivate groups or everyone for the
Reset "Verified Dates" for Athlete Records	•	For a Team/Athlete Year	

Choose the Status.	
	Search
Active	
Released	
Waived	
Inactive	

😫 Athlete - Davis, Crash										
	Archive	d	🗌 Cleared to Play 🛛 / 🗸 🗸	CTP Status:	Cleared		~			
Name: Crash	Davis	V 10. IEA	Team/Sport/Event	Status 🔺	osition/Dis	As Of	CTP Date	Jersey #	Clearance Notes	RM
(First) Nickname	(MI) (Last)	(Sumx)								
	FIONOUNS		Joe Tech Men Baseball	Active						<b>—</b> >
PreferiName			Joe Tech Coed Behavioral Health	Active		10/4/2021				<b>N</b>
Phone: 123456789	Year: Senior	~ 🔁			,					
Gender: prefer not to disclose	✓ DOB: 1/14/1998 <	× •	Record: 14 4 10f 2	<						>
Email: joe@kefferdevelopmer	nt.com	Age 23	Mark for review Pwk Comp	Cog Concuss C	omplete 🔋					Card View

# **Reset the Cognitive Concussion Flag:**

Set Athlete Team/Sport/Event Status	•	the second second
Reset Cognitive Concussion Flags	•	For All
Reset Academic Eligible Flag	•	For a Team
<b>Reset All Medical Question Checkboxes</b>		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.



### 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.

	Injury Notes/Sta	aff/Msg Genera	Concuss Evals	Medical History	Insurance	Emergency	eFiles/Docs/Dates	Additional Info	Medication	St
	Address/Other	Additional Info	Academic Eligibility							Γ
Π	Current School			cademic Eligibl	e n Previ	ous School —				
Π	Eligible Until:	/ /	✓ Fu	Il Schedule?	G	iraduated?	GPA:	]		
II	GPA:		Ar	nateur Status?	SAT S	Score: 0	Class Rank:			
Ш					ACT S	Score: 0				
	Notes									
						tote Type			~	

Top

Reset "Verified Dates" for Athlete Records	•	For All
,		For Team
	This is	For Organization

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.

	Mark for review Pwk Comp Cog Concuss Complete	Card View
Injury Notes/Staff/Msg General Concuss Evals Medical History Insur	nce Emergency eFiles/Docs/Dates Additional Info Medication Strength	
eFiles Paperwork Athlete Forms Athlete Portal Dates & Login History		
	4/10/2021 at 0	
Last opdated via Atriete Portai Surgery: 7 7	(lass All Dates	
Athlete Info: 9/ 7/2021 V CL Insurance: / /	CL Contacts: / / V CL Clear All Dates	
Login History		
Kiosk Logins Portal & Phone Logins		
	Contacts	
	Vaccinations Alerts/Notes	
	Paperwork Athlete Forms eFiles Notes Physicals Insure Emer Concuss	Team General Acad Elig Sickle Cell Cardiac COVID-19
	Paperwork Paperwork Complete Submitted Submit Date Verified Commer	t Not Cleared Mark as Last Updated via Portal
	COVID Screening	Cleared Athlete Info: 97 772021 V
	Insurance Card Back	Print/View
	Insurance Card Front	
	Participation Form	Reset Immune: 4/19/2021 V
		Contacts: / / 🗸
		Dependent to see the "Check Constate"
		option unds the \File\Utilities menu after
	All Submit No Submit All Verify No Verify New Paperwork Set	Satting your work.
	Davis, Crash O Kiosk Logins 10/07/2021 Team:	V 🔍 Paperwork "Check" Process
	😵 🧾 🝘 📰 🚺 🎇 🔿 Portal Logins 🛛 Prev 🛛 Next 🛛 Name:	Save Close

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.

Top

# **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.

Admin         Windows         Help           Image: Site Info         Site Info         Site Add/Update Teams & Organization	ns ▶							
Users		Drondown/Donun	Liete			U-d-t- D	1 T : -	
Dashboard Statistics		Available Docs/Fo	orms			Update Drop Update Moda	down/Popup Lists llity/Rehab/Stren	gth Lists
💱 Popup Area Maintenance							— 🗆	
Popup Area AthleteYear				~	Ø			
Description	Abbrev	NCAA/HS Year	Sort 🔺	Active	Last Used	Athlete See	rSchool Grade	
Guest	Guest		0					
Screen	Screen	Upper	0					
Freshman	Freshman	FR	1					
Sophomore	Sophomore	SO	2					
Junior	Junior	JR	3					
Senior	Senior	SR	4					
Transfer	TSF		5	$\checkmark$				
Transfer Jr	TSFJ		5					
Transfer Sr	TSFS		5	$\square$				
Grad 2019	Grad 2019		11					
Grad 2020	Grad 2020		11	$\checkmark$				
Grad 2021	Grad 2021		11					
Grad 2022	Grad 2022		11	$\checkmark$				

### **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. 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.

😫 User	
Information	Security
Name: Joe Streckfus	Teams Modules Email Groups Email/Opt Partial Admin Secure Msg Notes MSC Forms
(First Last) Administrator Athletic Trainer PRN Staff	
Coach Doc/Phy/Nurse Other	Coed Guest Team
Student Strength/Condition	✓ Men Sent by ATS
User ID: Joe Streckfus Password: **********	- Guest Teams
Disabled On-> / / V Reset 🗓 🔀 🖶 CL 🧃	Guest demo
	Guest test
	_ <u>M</u> Joe Tech
Email Addr: joe@kefferdevelopment.com	✓ Loed Irack
Text Addr:	
Title:	Process to disable is to hit the <b>DISABLE</b> button. Hitting this
License #: Force password	button will deactivate the user completely. It fills in the
└── change on next login ✓ Use secure messages	Disable on date, removes access to modules, and teams,
Phone/Location Email Signature Home Address Reset Login Info	and also will reset their "reset account questions", so they
Phone: () Office: ()	are not able to reset their password
Cell: ( Fax: (	
Location:	
Region: 0 🗸 🖓 Regional Admin	
Signature Concerto Ubload Cloar	
for S	Select All Unselect All Expand All Collapse All Region
	Actions
	Sarah Paset Diazhia New Pamaya Saya Class

For full details on disabling a user; make sure to review the Disabling a User document.

Tor

#### **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.

۵.	Injury Utilities	۶.	Purge Injuries Marked to be Purged
37	Scheduling Utilities	۲	Search Injuries Marked to be Purged
۵	Inventory Utilities	►	Default Injuries
1	Update Athlete Years		Global Update of Injury Status; one-to-another
0	Import/Export	•	Global Update of Injury Status; one-to-another by Date Range

### 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.

Admin Windows Help							
🚜 Site Info							
Add/Update Teams & Organizations	•	Add/Update All Teams					
🟥 Users	•	Add/Update By Organization					
💋 Maintenance	•	Combine Two Teams					
😨 Dashboard Statistics		Add an Organization					
() Athlete Security	•	Search Organizations					
Drug Testing	•	All Organizations					
Athlete Utilities	•	Change an Organization Name	1				
<ol> <li>Injury Utilities</li> </ol>		🔅 Configure Batch Report Printing Schedule					
🔐 Scheduling Utilities	+	Kun Baten Keport Processing					
			_				
😳 Batch R	eport S	chedule					
	-				A 1	<b>6</b>	

Sc	hedule	Details	(								
A	ctive   I	tive Report to Run			rocess	Run Time Of Day	Encr	Encrypt Pwd	Email To Users	Include Sports	
		Team Roster Limitations - By Sport with		Monday, Tuesd		6:00am Eastern		exampleonly	Joe Streckfus Joe Streckfus	Joe Tech Football Men, Joe Tech Ba Joe Tech Football Men	
		Emilations - by Sport with		monday,	10030	0.000m Eastern		exampleonly	UCC SHECKIDS		

# 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.

Adı	nin	Windows	Help		Site	nfo - Joe Te	ech										
<b>.</b>	Site I	nfo	•		Primary Main	Modules HIPAA St	Security	Tab Order	Opt(1) Opt(2	) Opt(3)	Swipe Card	Billing egal Ath	Claims/E	DI Pre-Login	Niosk Custom	Inventory	Screening Options
8	Add/U	Jpdate Tean	ns & Organizations	•	Athle	te Form 1	Athlete For	m 2 Athlete	Form 3	2004.01		ogu ru					
	-				Op M V S	ions Sport. ake this for XOVID C 19 Show th Send Nig eason:	/Team/Eve m availab 9 Athlete : iis form a htly Batch	ent Filter Oi ble on the p screening automatic Notices Notices	ganization Filte hone and po # C ~ ally after a Notices Notice Ti ext" or "Bott message to	r thlete lo fo: me: for "N 5 50 cha	vgin v	~					
												~					
							Batch	n Message	e (max 250	0 chara	cters)						

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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.

	Athlete Utilities	•	Purge Athletes Marked to be Purged		
0	Injury Utilities	•	Purge Athletes with Last Injury Date before XXX		
<b>3</b>	Scheduling Utilities	•	View Athletes Marked to be Purged		
۵,	Inventory Utilities	•	Interaction Reports	•	and the state of the
1	Update Athlete Years		Physical Expiration Date	•	
0	Import/Export	•	Add Athletes on One Team to Another		
	Transaction Logs	•	Add Athletes on One Team/Year to Another Team		
8	Data Miner		Set Athlete Team/Sport/Event Status for Team/Year		
۲	Injury Analytics Reporting		Resize Insurance Images		
	Search All Athlete Records		Resize Insurance Images for a Team		
۲	Year-End Processing	•	Secondary Insurance	•	
۰	Combine Athlete Records		Update Insurance Payor #	•	Change All
*	Set Required Fields		Update "Athlete See" eFiles status	•	For a Team
	Custom Reports	-	Send Athlete Info to Another ATS Database		For an Organization For a Class Year

### 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.

Тор

For full explanation of the Athlete Security menu, please review the <u>Athlete Security</u> help doc.

### Force Password Change for Athletes/Emergency Contacts:

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