# **Organization Admins:** Getting to Know the ePACT System

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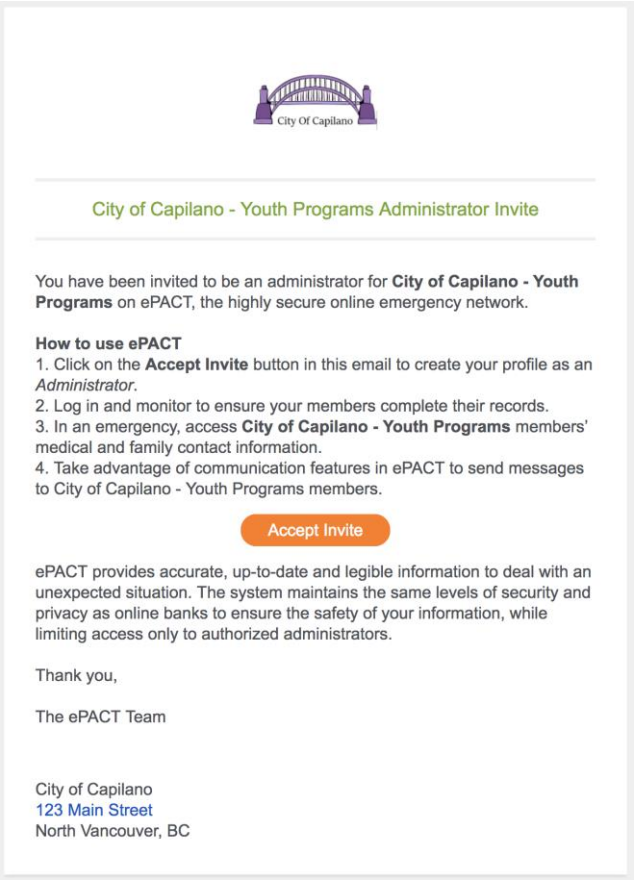
# Getting Started

Your Account Manager will send you an email invite to be an administrator for your organization's ePACT account. Click on **Accept Invite** and log in to your existing account or create an account.

Click **Accept** to accept your administrator invite and gain access to your organization.

**After your families have registered for the season, the member's record will be added to ePACT via the API, manually or by a spreadsheet upload.**


City Of Capilano

City of Capilano - Youth Programs Administrator Invite

You have been invited to be an administrator for **City of Capilano - Youth Programs** on ePACT, the highly secure online emergency network.

**How to use ePACT**
1. Click on the **Accept Invite** button in this email to create your profile as an *Administrator*.
2. Log in and monitor to ensure your members complete their records.
3. In an emergency, access **City of Capilano - Youth Programs** members' medical and family contact information.
4. Take advantage of communication features in ePACT to send messages to City of Capilano - Youth Programs members.

Accept Invite

ePACT provides accurate, up-to-date and legible information to deal with an unexpected situation. The system maintains the same levels of security and privacy as online banks to ensure the safety of your information, while limiting access only to authorized administrators.

Thank you,

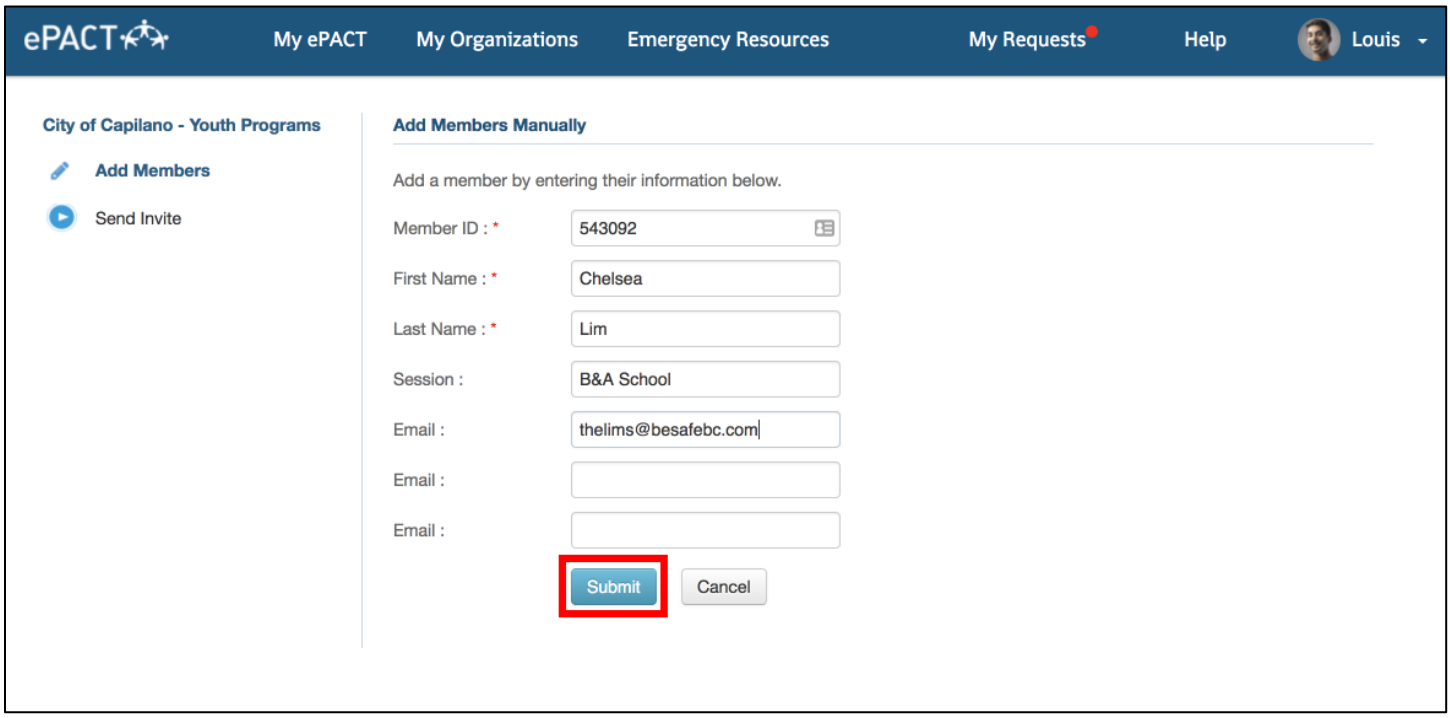
The ePACT Team

City of Capilano
123 Main Street
North Vancouver, BC

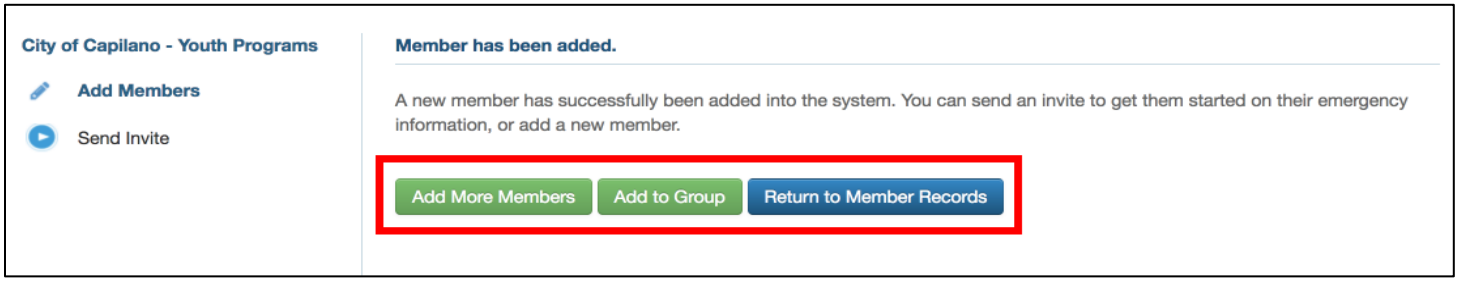
## Uploading Individual Members:

1. Click on **+Add Members > Add Manually.**

2. Complete your member's basic information (all fields with an asterisk are required) and click **Submit**. *Please note that the fields may vary depending on your type of organizations.*




3. Click **Add to Group** to add them to a group now (this can be done later) or click **Add More Members.** If you are finished, click on **Return to Member Records.**



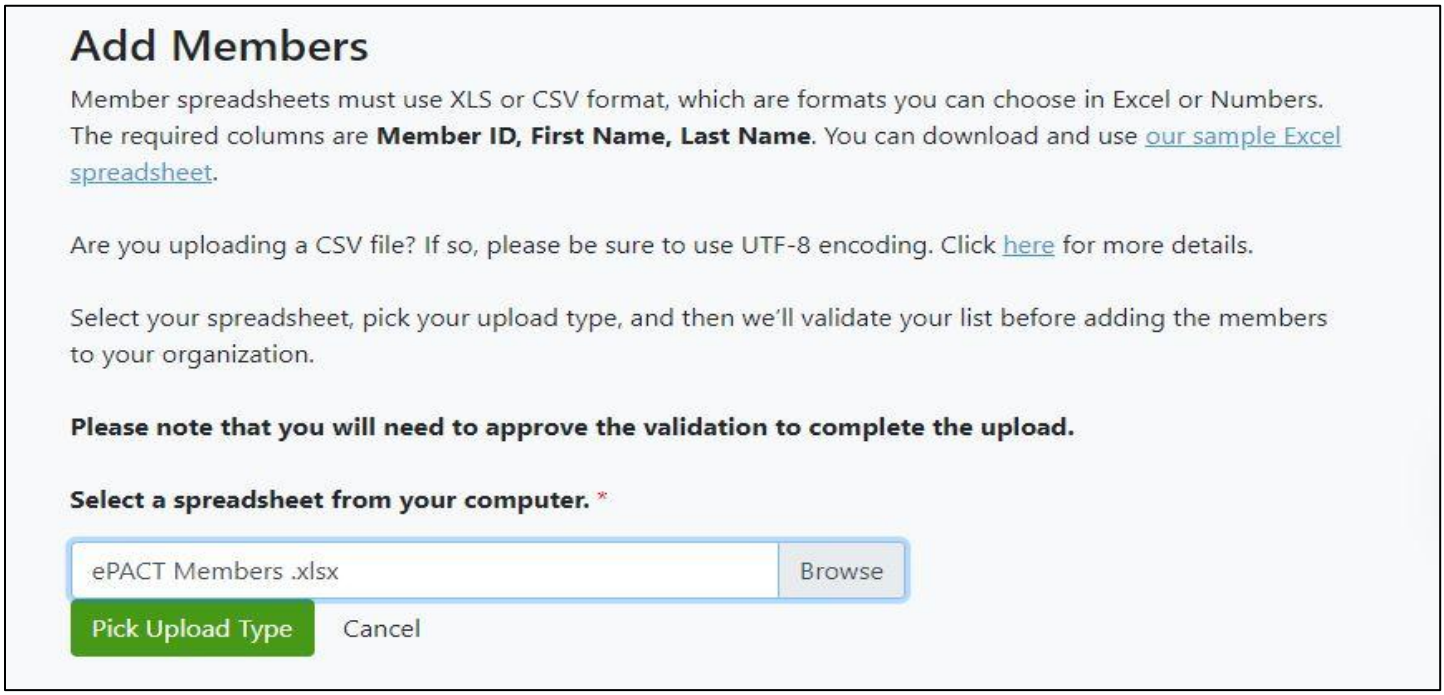

*To invite this new member, select their name from All Member Records and click **Message Members > Invite**.*

## Uploading Multiple Members Via Spreadsheet:

1. Click on **+Add Members > Upload Spreadsheet**

2. Select your spreadsheet from your computer. The required columns are Member ID, First Name, Last Name and Email. The file must be in XLS or CSV format. Then click **Pick Upload Type**

*You can choose to include additional columns such as group, session, or program start date. Check your Upload Settings to make sure your headings match ePACT's defaults or customize.*



3. Pick your Upload Type:

   **Add New:** Select this option if you are uploading a list of new members/administrators. Do not select this option if your spreadsheet includes existing members.

   **Full Sync**: Use this option if you want your ePACT database to be an exact replica of your spreadsheet. Anyone NOT in your spreadsheet will be disconnected. Select this option if you are uploading a full list of all your active members.

   **Partial Sync**: This upload is based on the groups listed in your spreadsheet. It will add and remove any members from the groups listed in the spreadsheet but will ignore any groups not in the spreadsheet. This option will not disconnect members from your database. Select this option if you are only uploading a partial list of your members.

   **Custom Upload:** This will allow you to create your own upload as needed by selecting only the action needed. Select this option if you need to do one action as it will be quicker than a full upload.

4. On the dashboard, navigate to your **Account Activity Log**, where you will see the spreadsheet upload. Select **Review Validation > Download Validation Report.** Check to make sure there are no errors and click **Upload Spreadsheet.**

*This may take a few minutes, and progress can be checked in the Account Activity Log.*

## Uploading Administrators:

Organization Administrators (have access to all records) and Group Administrators (have access to specific groups, such as coaches, teachers, or counselors) can also be added via API or spreadsheet.

1. Select the Administrator tab and click **+ Add New Administrators > Upload Org/Group Administrators.**

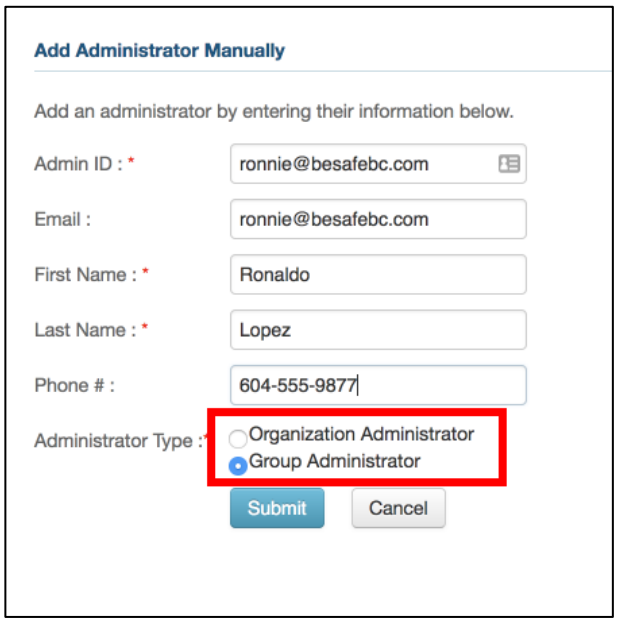
Follow the same upload instructions as above, but note that spreadsheets must contain First Name, Last Name and Admin ID as headers. These may also be customized in Upload Settings.

## Add an Individual Administrator:

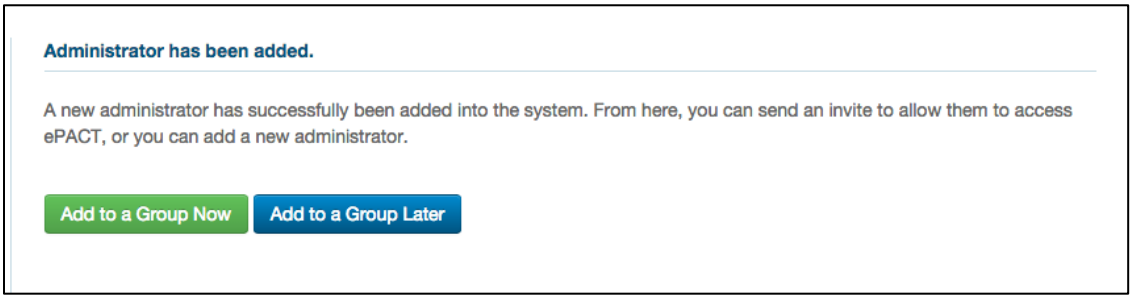
If adding a small number of administrators, you may prefer to add them manually.

1. Select the Administrators tab and click **+ Add New Administrators > Add manually.**

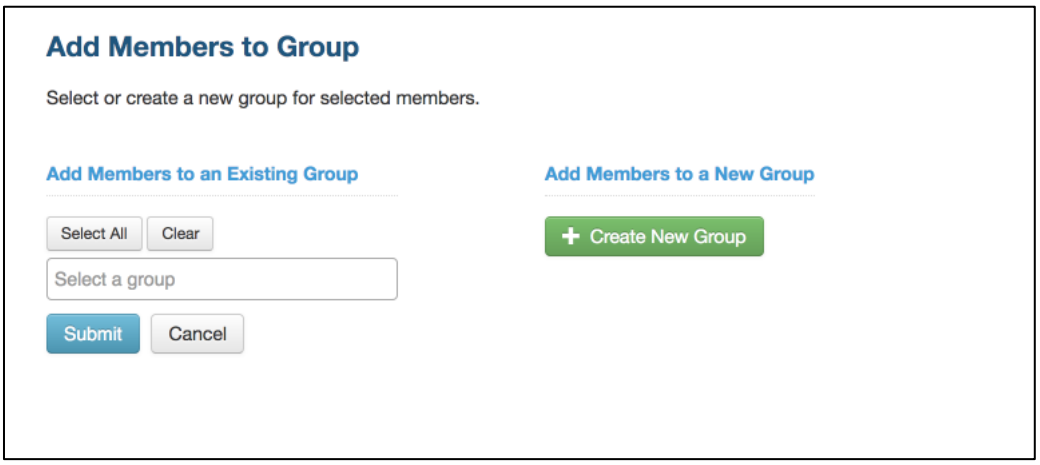
2. Add the name, email address and phone number of the new admin. Be sure to choose the type of administrator they are. (*Admin ID numbers should come from your registration system, but you can also simply use the admin's email or a numbering system as an alternative*.) And click **Submit.**



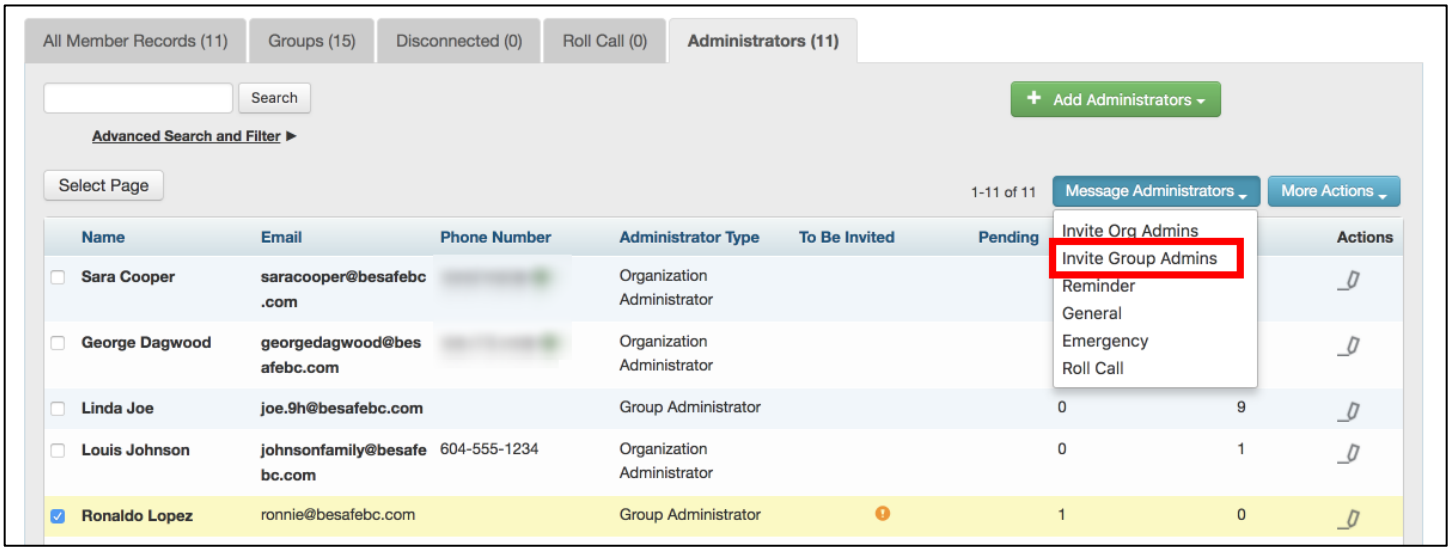

3. Select **Add to a Group Now** or **Add to a Group Later**. If you wait, you can add them to a group later using **More Actions > Add to Group.**




4. If adding to a group now, **select a group** or **Create a New Group** to add the administrator to.

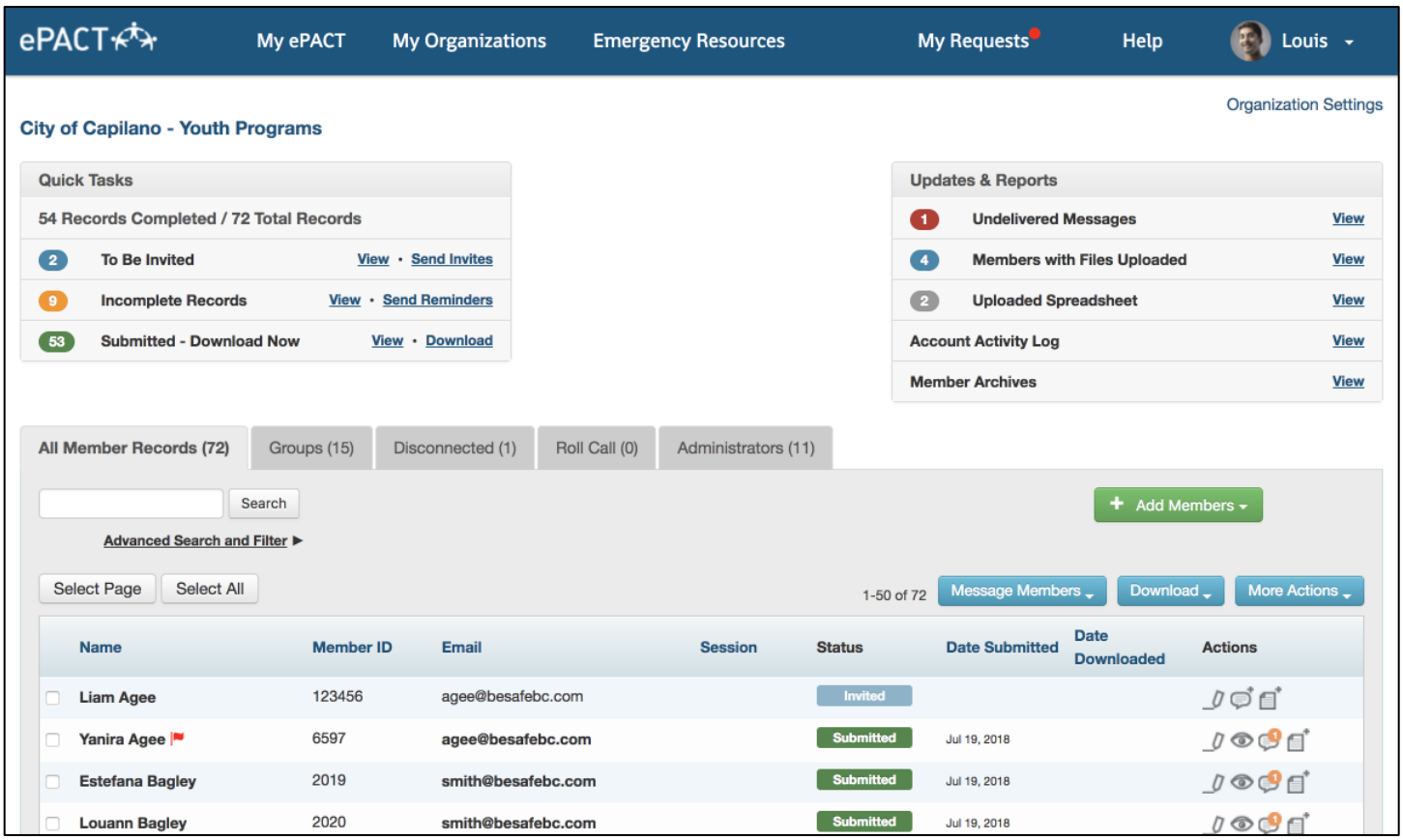



5. When you are ready, select the new admins and click **Message Administrators > Invite Admins** to give them access to the group. They'll be sent an email invite to accept this role and be given access to the dashboard.




# Your Member Dashboard

Once you've added your members, you'll be able to access your members' emergency information (including their email addresses and status) on your **Member Dashboard**.



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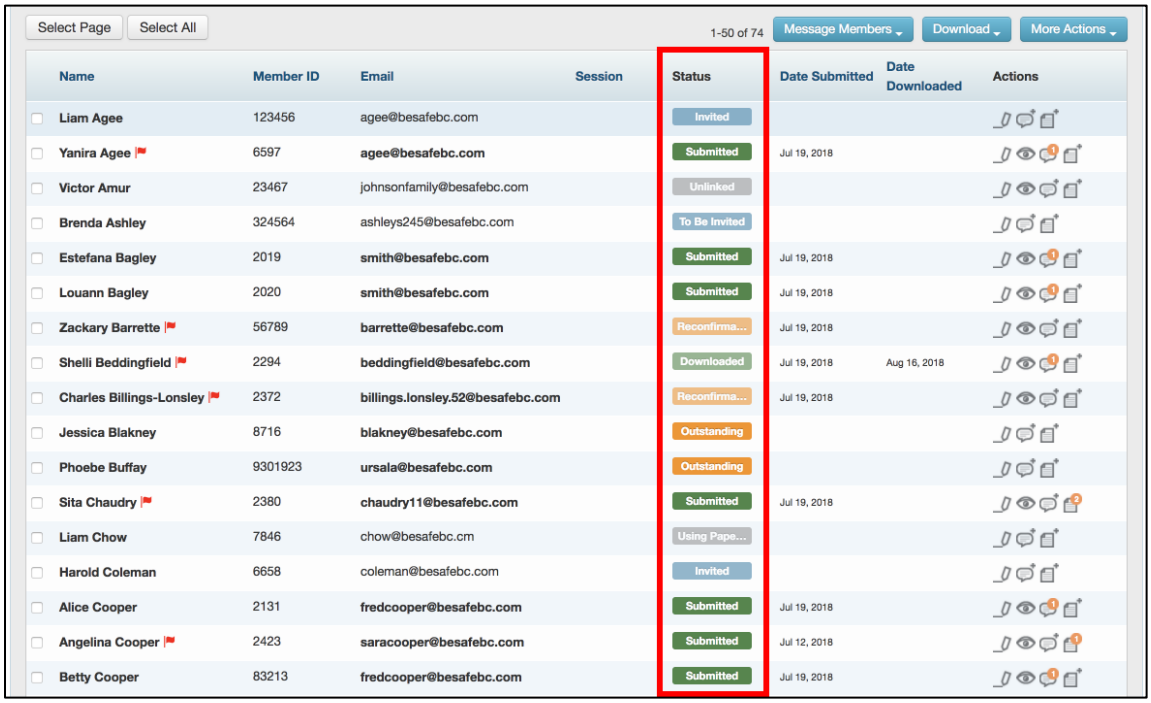
## Status:

The status column will help you figure out who has completed their emergency information.




| Name | Member ID | Email | Session | Status | Date Submitted | Date Downloaded | Actions |
|---|---|---|---|---|---|---|---|
| Liam Agee | 123456 | agee@besafebc.com | | Invited | | | |
| Yanira Agee | 6597 | agee@besafebc.com | | Submitted | Jul 19, 2018 | | |
| Victor Amur | 23467 | johnsonfamily@besafebc.com | | Unlinked | | | |
| Brenda Ashley | 324564 | ashleys245@besafebc.com | | To Be Invited | | | |
| Estefana Bagley | 2019 | smith@besafebc.com | | Submitted | Jul 19, 2018 | | |
| Louann Bagley | 2020 | smith@besafebc.com | | Submitted | Jul 19, 2018 | | |
| Zackary Barrette | 56789 | barrette@besafebc.com | | Reconfirma... | Jul 19, 2018 | | |
| Shelli Beddingfield | 2294 | beddingfield@besafebc.com | | Downloaded | Jul 19, 2018 | Aug 16, 2018 | |
| Charles Billings-Lonsley | 2372 | billings.lonsley.52@besafebc.com | | Reconfirma... | Jul 19, 2018 | | |
| Jessica Blakney | 8716 | blakney@besafebc.com | | Outstanding | | | |
| Phoebe Buffay | 9301923 | ursala@besafebc.com | | Outstanding | | | |
| Sita Chaudry | 2380 | chaudry11@besafebc.com | | Submitted | Jul 19, 2018 | | |
| Liam Chow | 7846 | chow@besafebc.cm | | Using Pape... | | | |
| Harold Coleman | 6658 | coleman@besafebc.com | | Invited | | | |
| Alice Cooper | 2131 | fredcooper@besafebc.com | | Submitted | Jul 19, 2018 | | |
| Angelina Cooper | 2423 | saracooper@besafebc.com | | Submitted | Jul 12, 2018 | | |
| Betty Cooper | 83213 | fredcooper@besafebc.com | | Submitted | Jul 19, 2018 | | |

**To Be Invited** – Member has been added to the system but has not been sent an email request to share their emergency information.

**Invited** – The member has been sent an email request but has not accepted yet.

**Outstanding** – The member has not yet completed their emergency information.

**Submitted** – The member's emergency information is ready to be viewed and/or downloaded. (Date submitted, which also includes when information was last changed, is in the next column.) *If a member makes any changes to emergency information after their file has been downloaded, the date will change in the date submitted column to the date of the change.*

**Downloaded** – The member's emergency information has been downloaded. (Note the date downloaded last, in the next column.)

**Reconfirmation** – The member has been sent an email request to reconfirm their information or answer/accept a new question/waiver.

**Using Paper Form** – Member completed their emergency information via paper form.

**Unlinked** - The member had disconnected from your organization. They will be in the **Disconnected** tab. You can revert them and re-invite them when necessary.

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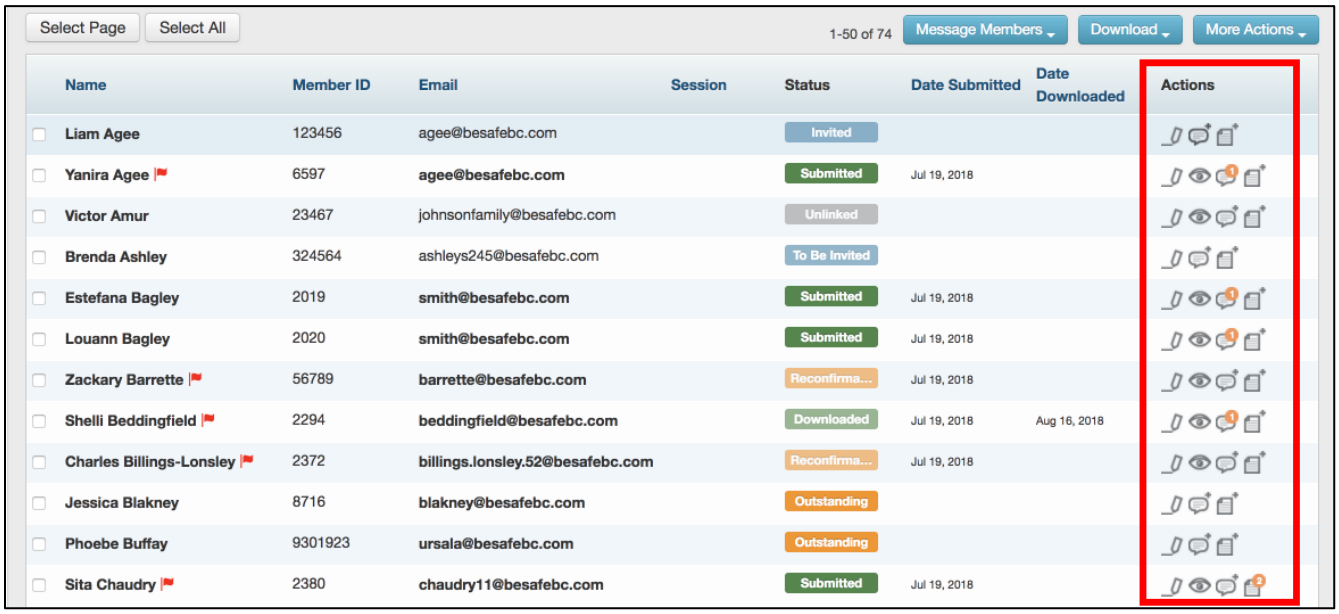
## Actions:



**Edit**: Change basic contact information, such as name or email address.

**Quick view**: view the member's emergency information without having to download it.

**Comment**: Leave a comment about a member that only admins can see.

**Manage shared files**: Add, view or download uploaded files, such as a doctor's note

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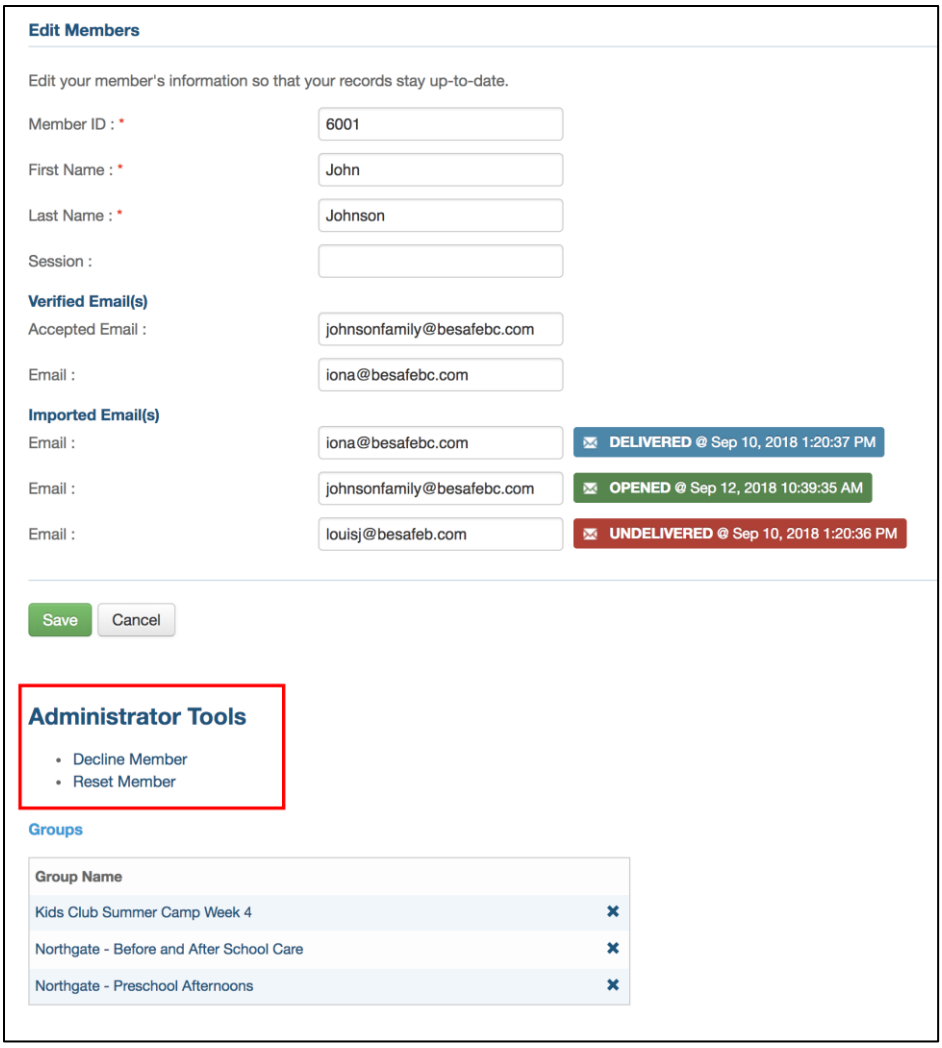
## Edit Members – Administrator Tools:

If a member declines to use ePACT, you can indicate this clicking on the Edit icon and then clicking on **Decline Member.**

If the invite has been accepted by the wrong email address (**Verified email address** needs to be changed), please click on **Reset Member**, make the required change and then click on Save. The member will be reverted to the unconnected "To Be Invited" status. Please re-invite them to gain access to their member information.

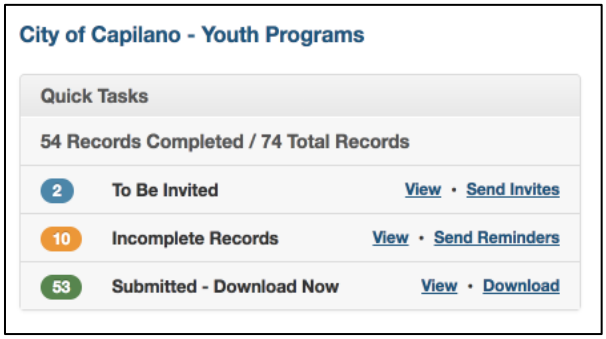



## Edit Members – Email Status:

Next to the Imported Emails you can see what day and time the invitation email was **Delivered**, **Opened**, or if it was **Undelivered**.

## Quick Tasks:

Quick Tasks provides an overview of your submissions and shortcuts (including links to send Invites or Reminders).




**To Be Invited** – Send an email request to new members so they can create and complete an ePACT record.

**Incomplete Records** – Send a reminder email to members who still need to complete their emergency information.

**Submitted – Download Now** – Completed records that have not been downloaded will be listed here. If you are alerted of a modified record, it will be available here. (Note: If you would like a list of all submitted files, including downloaded and not downloaded, you can use the advanced filter function.)

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## Updates & Reports:

**Undelivered Messages** – See a list of members who have invalid email addresses that have undelivered emails.

**Members with Files Uploaded** – Any time a member uploads a file, such as a doctor's note or allergy plan, you'll be able to view the member and their files here.

**Uploaded Spreadsheets** – View spreadsheets that have been shared with your ePACT Account Manager.

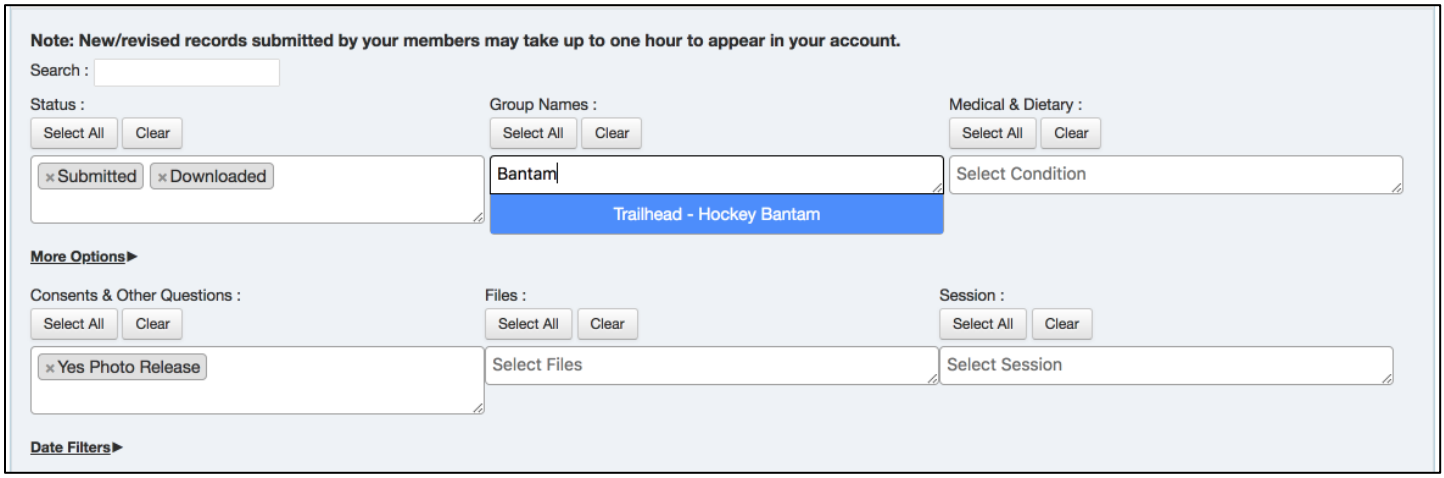
**Account Activity Log** – View activity history of any tasks for 50+ members in your account. This includes sending any messages, modifying groups, disconnecting members, removing administrators, and more.

**Member Archives** - View the 50 most recent archives in your organization that meet your search criteria. If you are not using the auto-archiving feature you will not see this option.

**Check in Check Out Archives** - View archived check in/out sheets from the mobile app, including health screening information. If you are not using the Check in feature, you will not see this option.

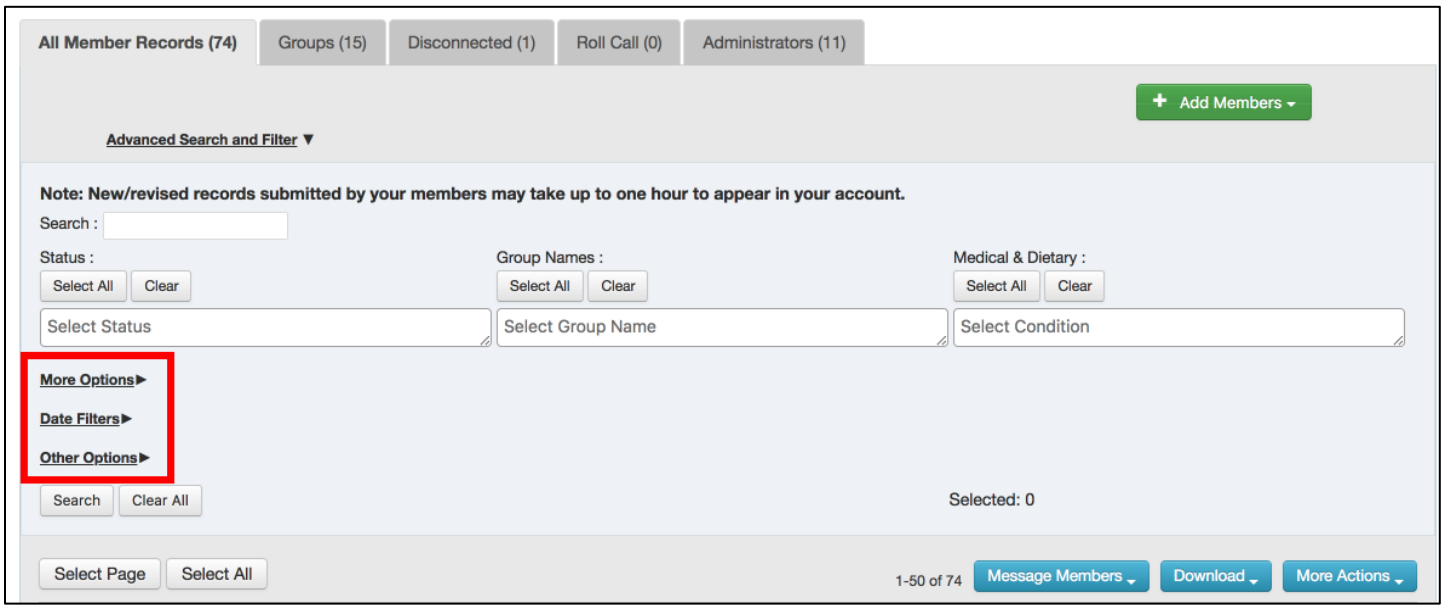
## Advanced Search and Filter:

You can use the Search box for a simple search based on a Name, Email, or Member ID. The **Advanced Search and Filter** can be used for a more advanced search using filters like Medical and Dietary Conditions or which members are still Outstanding.

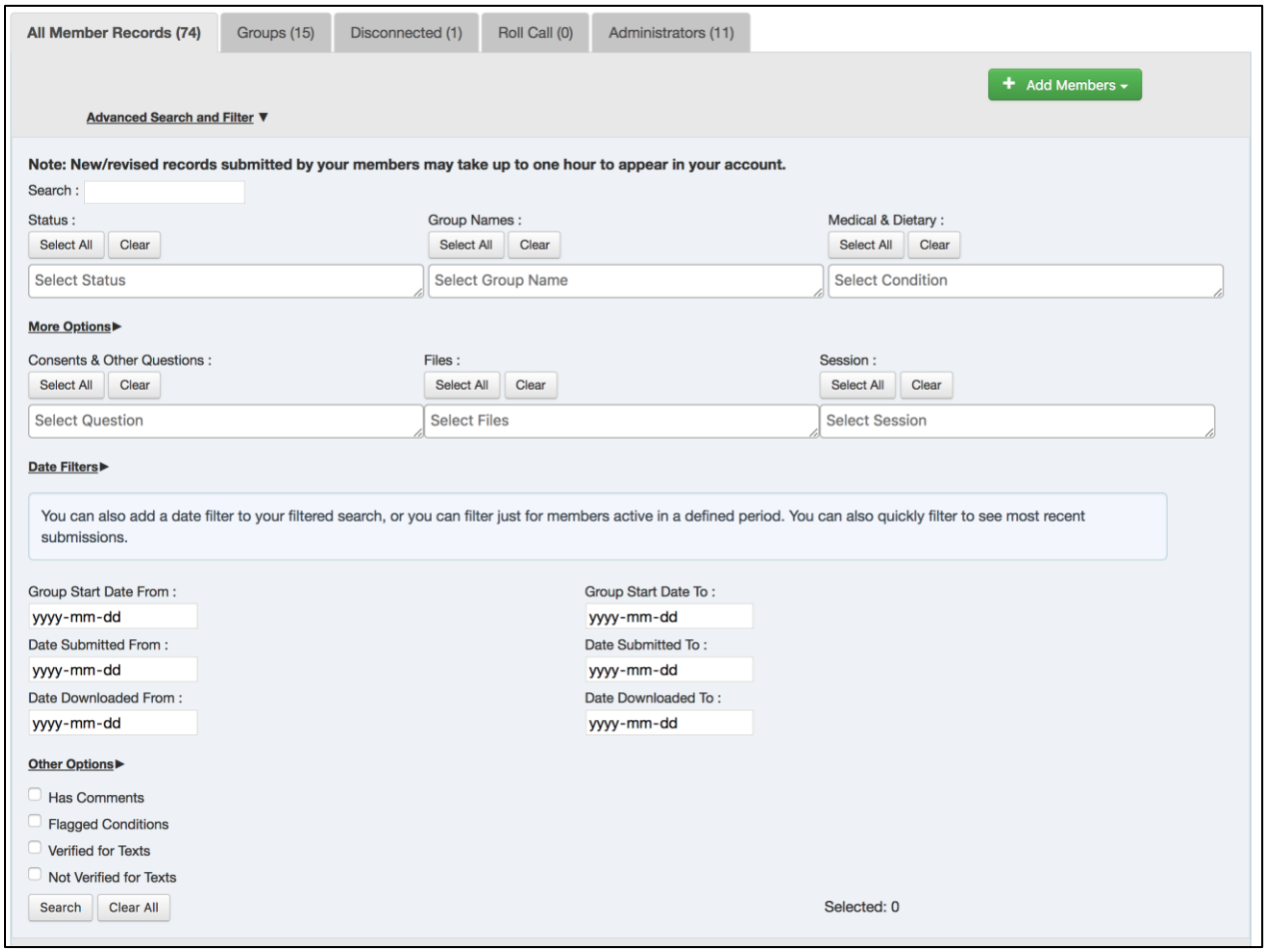



You can also **type** in the select field instead of scrolling through each filter for a specific criterion.

**Expanding the extra options** allows you to apply additional criteria to your search and filter.

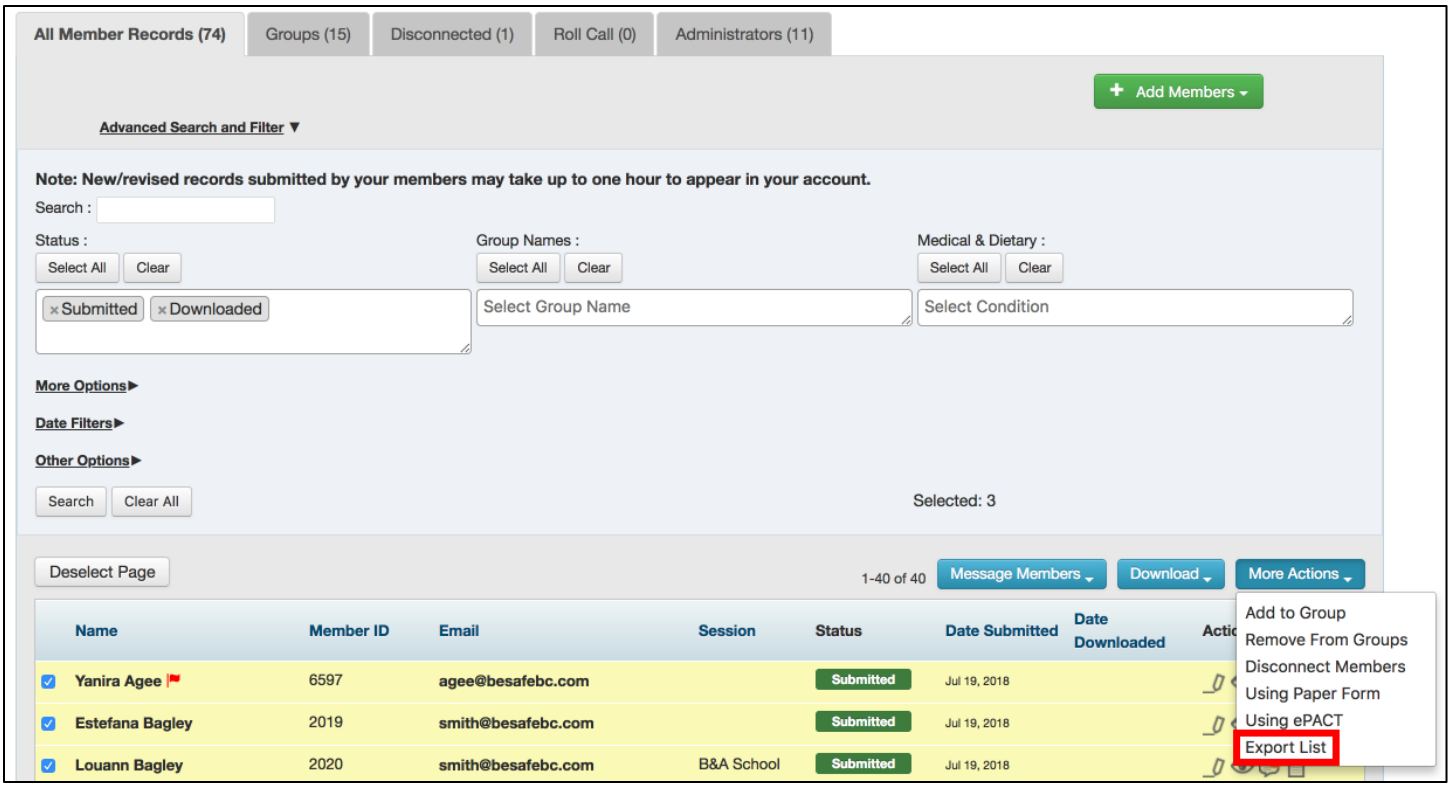



**Date Filters** allow you to narrow down your search even more. You can filter for members in a group with a particular start date. You can choose to have the date range applied to your filtered search or you can filter just for members active in a defined period.



Once you have determined your filters, click **Search** to get a list. You can select all and click **Download > Records** to download all the records matching your search filters. If you want to sort within your search and filter finding, be sure to click the heading afterwards. Also, *be sure to click **Clear** before trying a new search.*

You can also export the results of your search by clicking on **More Actions > Export List** to create a spreadsheet.



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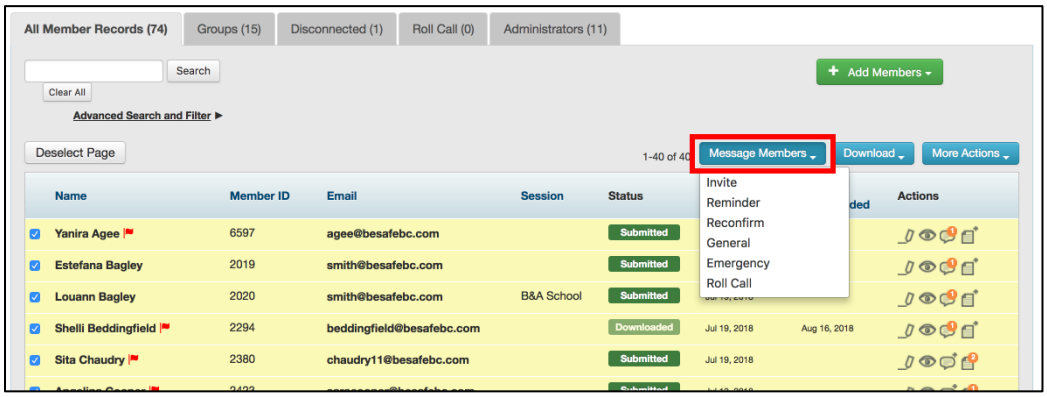
# Sending Messages:

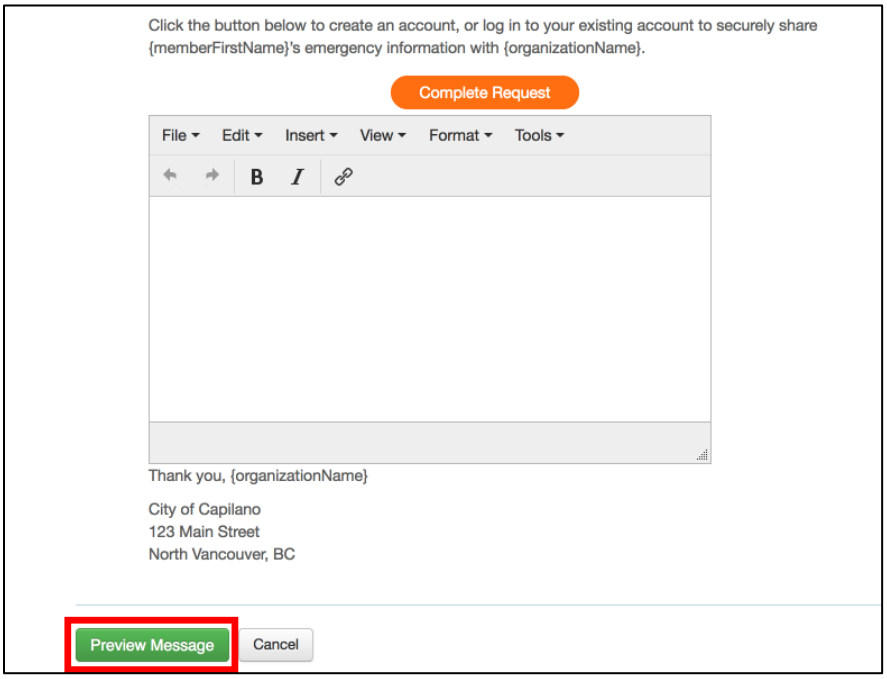
You can message members for different situations:

- **Invite:** Invite a member to create an account and share their emergency information.
- **Reminder:** Send a reminder email to members who still need to complete their emergency information.
- **Reconfirm:** Ask a member to confirm that their information is up to date.
- **General:** Send a general email to members.
- **Emergency:** Send an urgent email to members.
- **Roll Call:** If your organization added Roll Call as a feature (text messaging two-way communications), you can start a roll call from here.

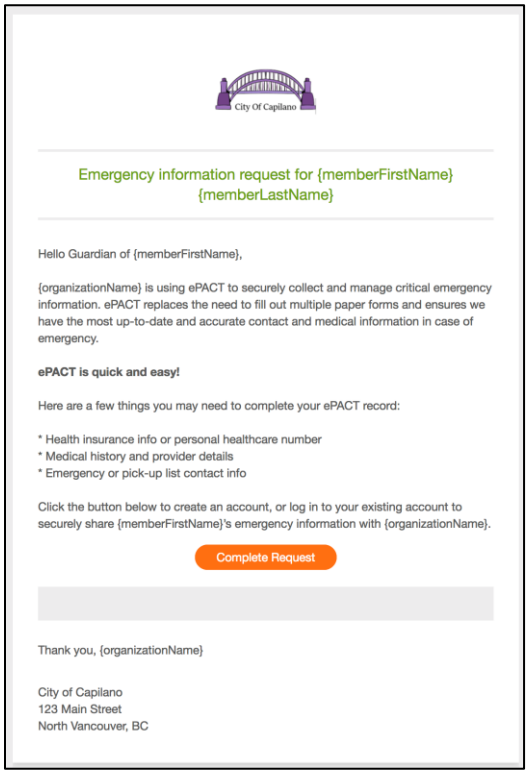
1. Select the member(s) you want to message by clicking **Select All**, by using a filter, or checking off the box.
2. Click **Message Members** on your dashboard, then select the type of message you would like to send.

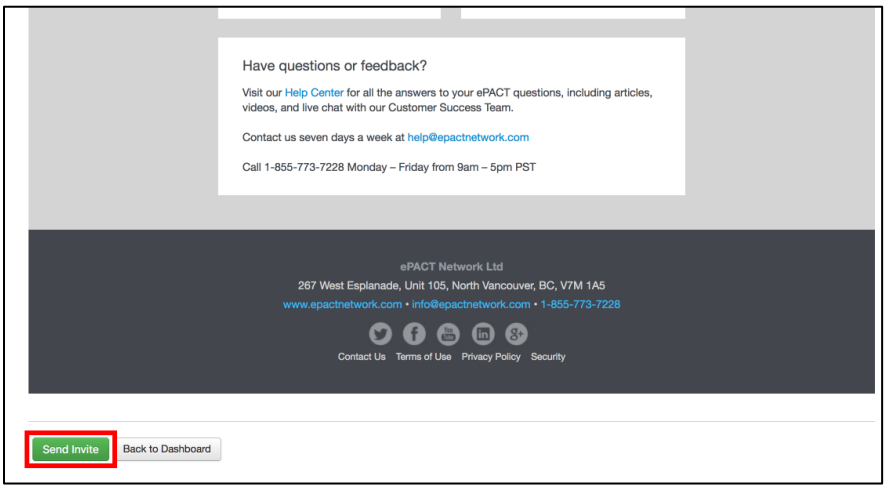



3. Review the email template before sending. Although you are unable to edit text in the actual body of the email, you can edit the subject and/or add additional information to the message (e.g. a due date to submit). You will need to draft your own general or emergency message. Any text in parentheses should never be altered as it allows you to send personalized messages to several members at once. Click **Preview Message** when you're done.

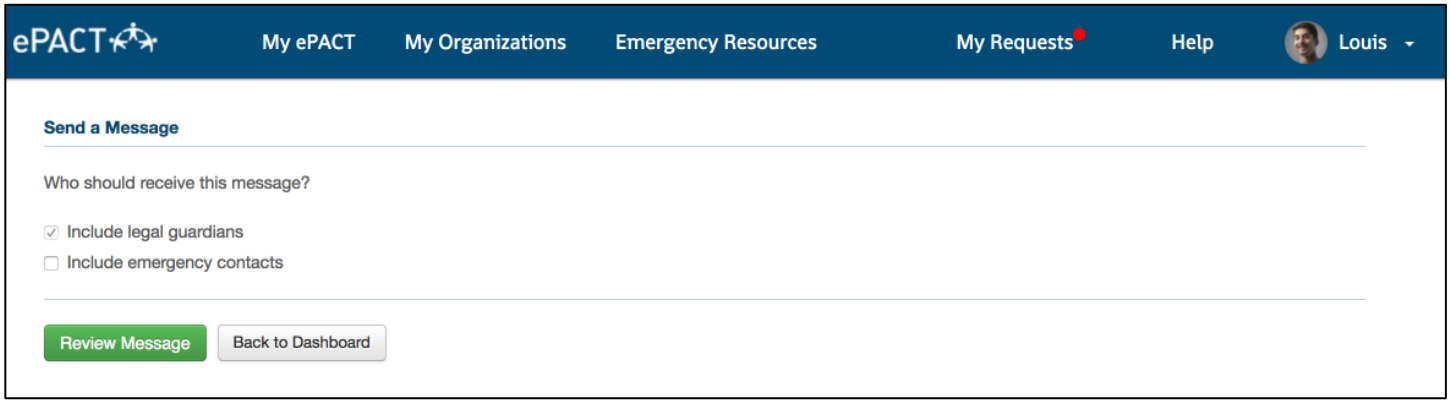


4. This is the message your members will receive. If you need to fix the edited text or edit the recipients, click **Back to Dashboard**. If not, click **Send Invite**.




Please note that you can also include Emergency Contacts, Out of Area contacts, and/or Household Members as recipients for General and Emergency messages.



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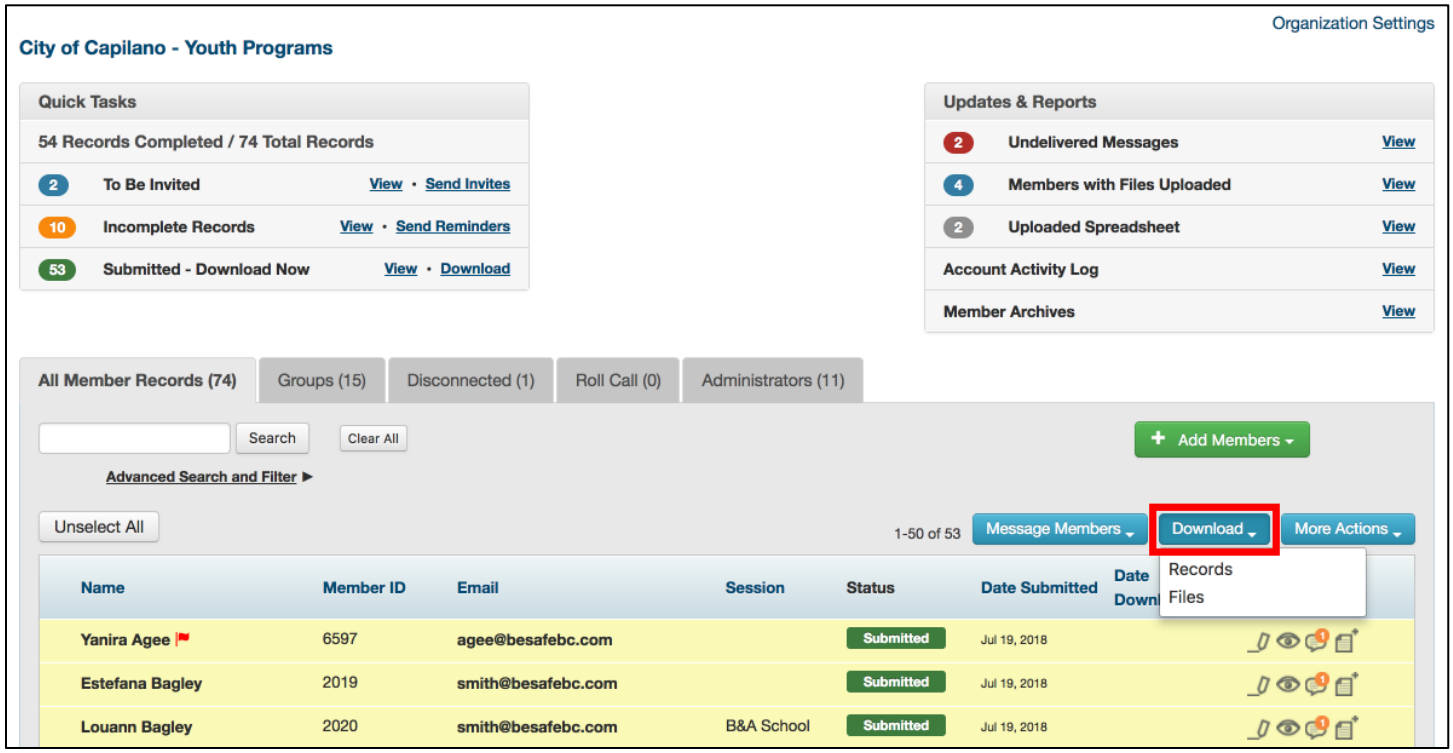
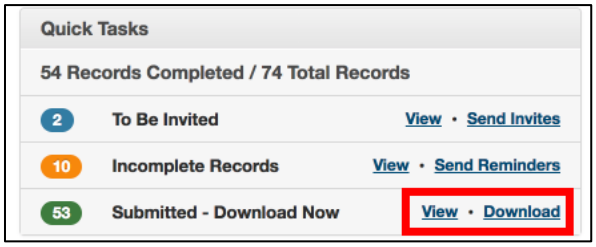
## Downloading Records:

Once a member has completed their information, you can download their record if you wish to print it or keep an electronic copy. To manually create a full organization archive, please click on Select All, Select All Members who match this search, and then **Download > Records**. The archive will be automatically named after the date & time it was created.

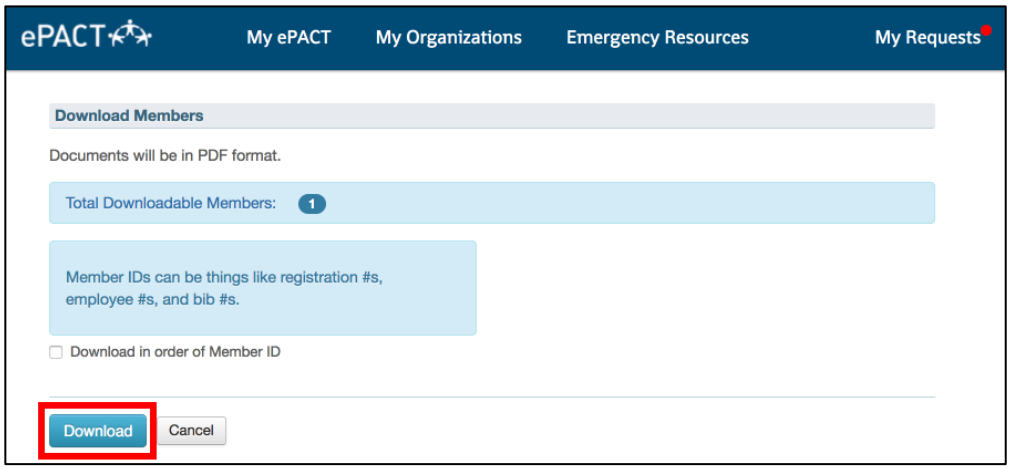
1. Select the member(s) you would like to download then click **Download > Records**.




2. If you'd like to download all members who are ready to be downloaded, you can do so via the Quick Tasks. Click **View** to see a list of all members who still need to be downloaded or click **Download.**



3. Click **Download** to download a PDF version of the record(s). The PDF can then be saved in a secure location. You will need to use your PDF Reader's (like Adobe Acrobat) printing option if you need to print.



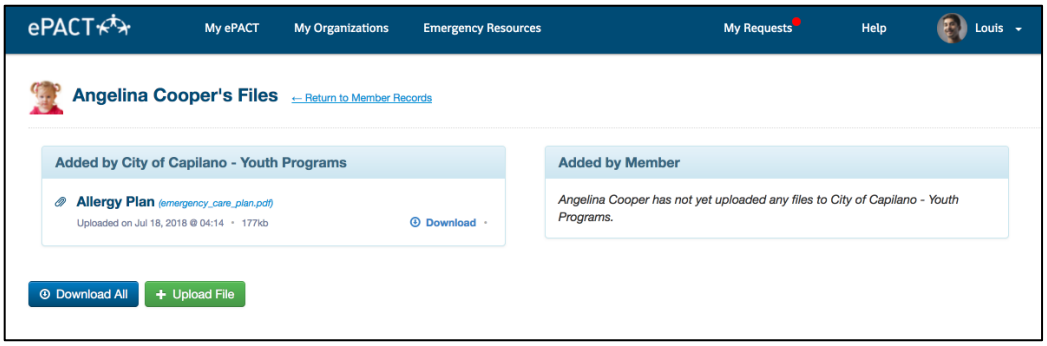

***As a convenient alternative to regular downloads, we offer an <u>auto-archiving feature</u> as an add-on to the regular subscription packages. Auto-archiving will track changes, and save every new copy of the form as it is updated. Archives are then available directly from your dashboard. If you are interested in learning more, reach out to our Customer Success Managers.***

## Adding, Viewing, or Downloading Uploaded Files:

Both members and admins can add files, like doctor's report or even scanned paper forms to individual records.

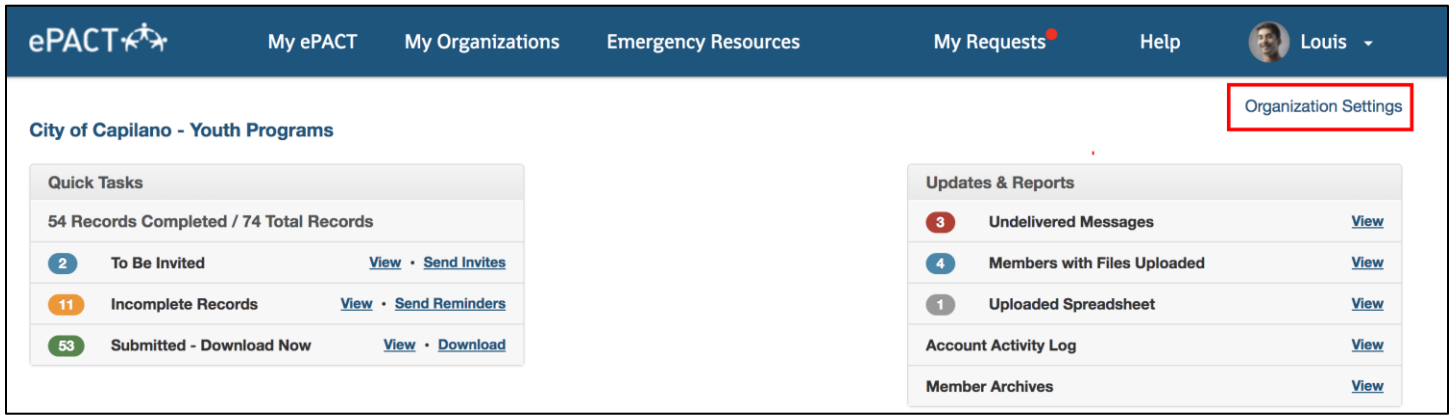
1. Click on the File Uploaded icon. If it is flagged with a number in an orange circle, there has already been a file uploaded by a member or admin.

2. To add a file, click on **Upload File.** You'll need to select the file for upload. If you wish to download a file that an admin or a member uploaded, click on **Download** (or **Download All**).

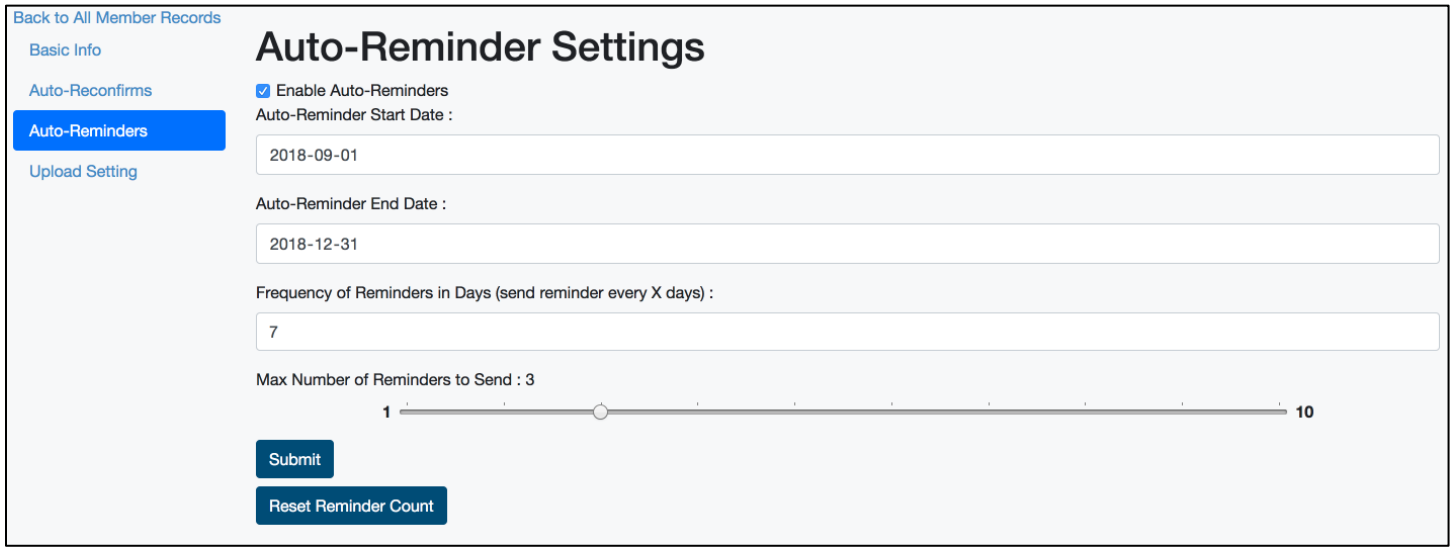


## Settings – Auto-Reminders:

Auto-reminders make it even easier and faster for you to collect emergency information and waivers from your members. Enable auto-reminders at any time to remind and encourage your members to share their key information with you.




To get started, select **Settings > Auto-Reminders.**



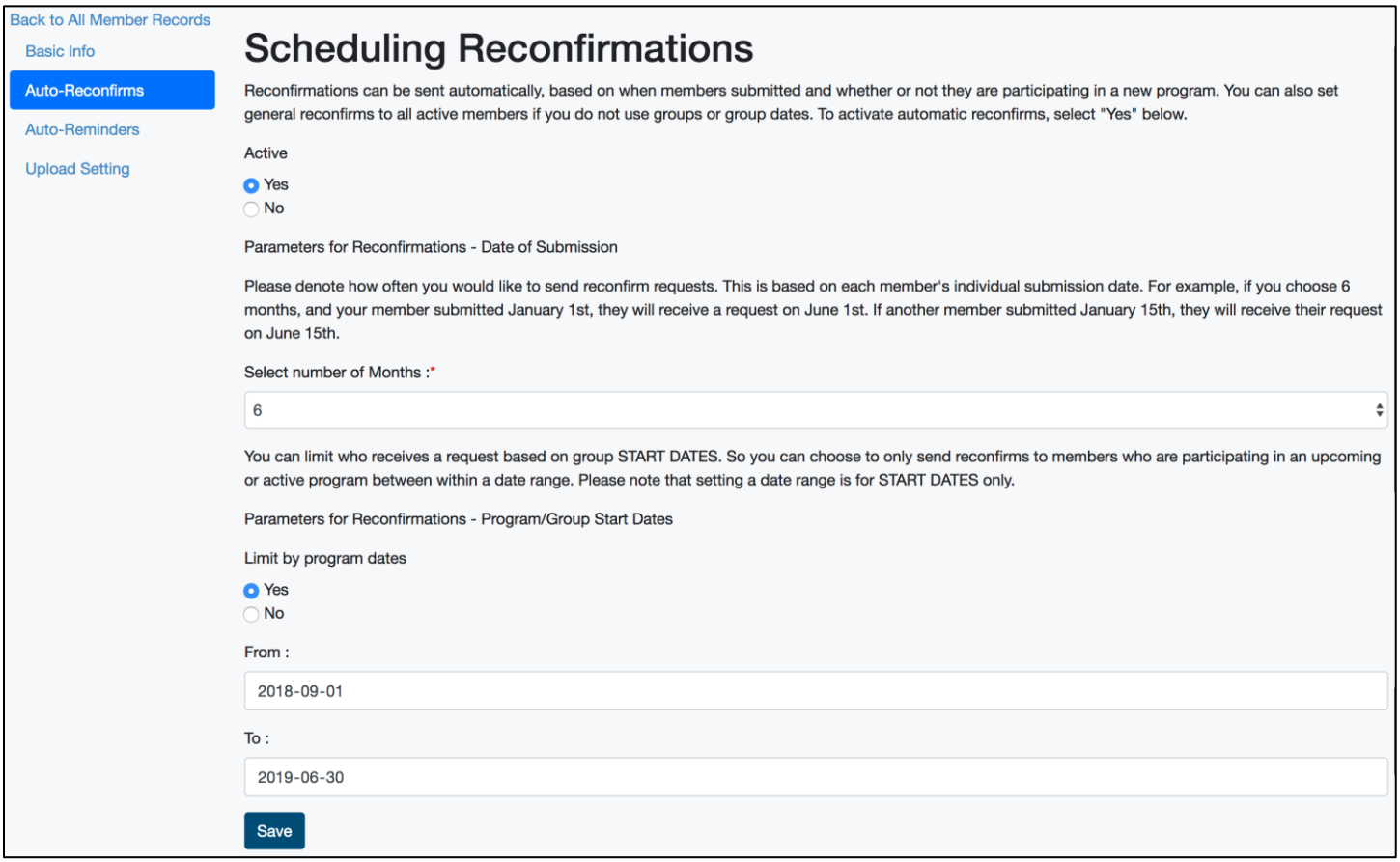

1. Check off **Enable Auto-Reminders** to activate this feature. *You can disable auto-reminders at any time by un-checking this box and clicking **Submit.***
2. Select the time frame in which you'd like your auto-reminders to send by selecting the Auto-Reminder Start Date and Auto-Reminder End Date.
3. Select how often you'd like reminders to send.
4. Select how many reminders you'd like each member to receive. This count will also consider the number of reminders a member has been sent manually.

ePACT

## Settings – Auto-Reconfirms:

Automated reconfirms can be set to automatically send a reconfirmation request to anyone with information that's older than a defined timeframe (e.g. reconfirm every 6 months).

To get started, select **Settings > Auto-Reconfirms.**




1. To enable the Auto-Reconfirms, select **Yes** under Active
2. Select how often you would like to send reconfirm requests. For example, if you select 3 months, the reconfirm requests will send to any members who submitted their information more than 3 months ago.
3. You can also limit which members receive an auto-reconfirm based on the start date of the groups that they are in.
4. Click **Save.**

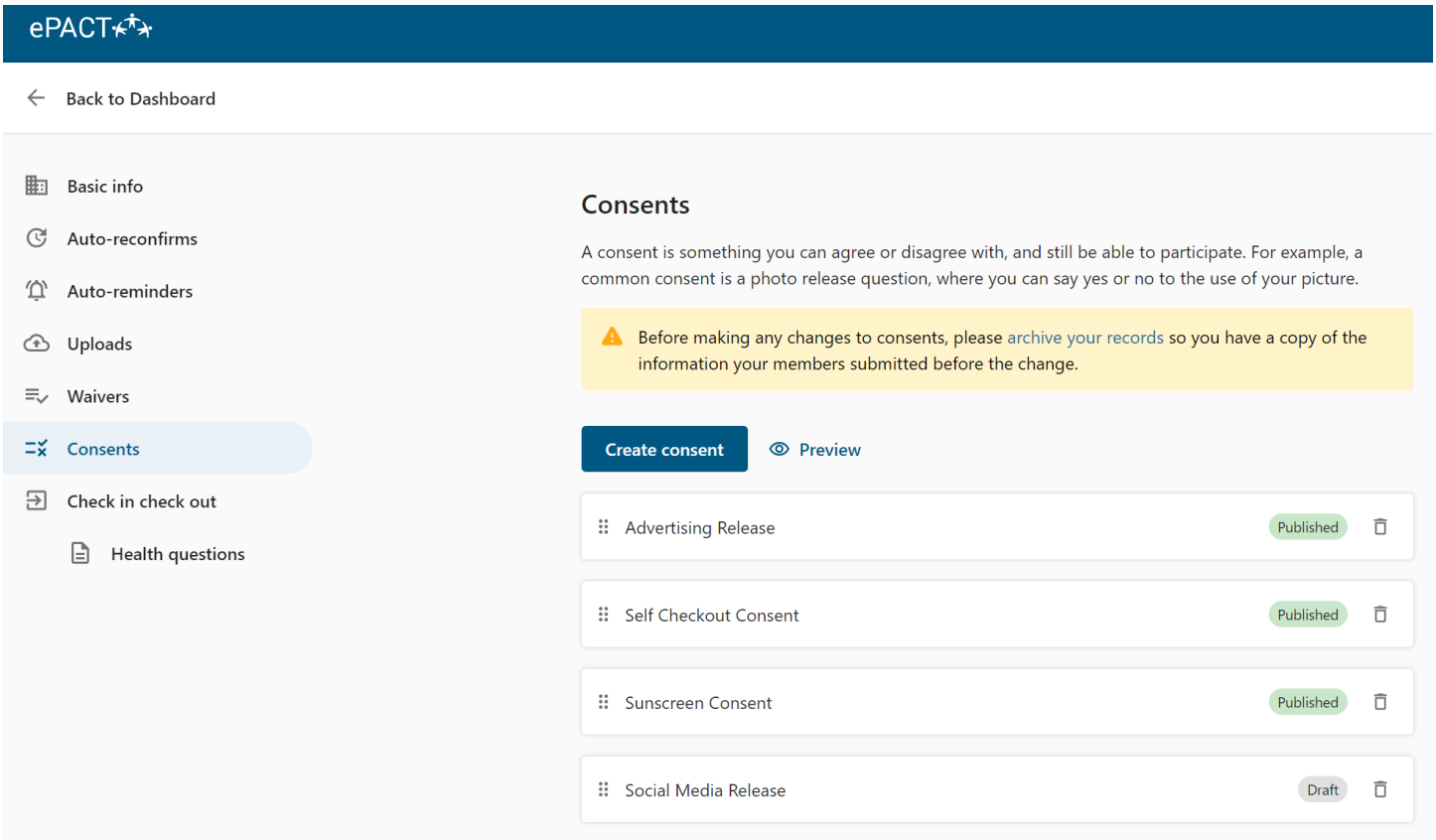
You can return to the Auto-Reconfirms section under **Organization Settings** at any time to enable or disable auto reconfirms or to change any of the scheduling parameters you've set. Don't forget to update these with different program seasons!

ePACT

# Settings – Waivers and Consents:

Waivers are a part of your form that requires an initial or signature from the guardian, whereas consents are yes/no questions. Both appear in the final step of the form, immediately before guardians submit their information.

To view, add or delete your organization's waivers or consents, go to Settings.




From the waivers and consents tabs, you can use the preview function to see the questions as they will appear to guardians in the form. Waivers and consents can be left in draft mode and previewed before publishing. Published waivers are live for members to see in the forms.

Once waivers or consents are published, they CANNOT be edited. You will need to create a new version and delete the old one.

Before making any changes to your waivers or consents, make sure to archive your records. You can do this with our auto-archiving feature, or manually, by downloading records (see above). This will ensure you do not lose records of previously signed waivers and consents.

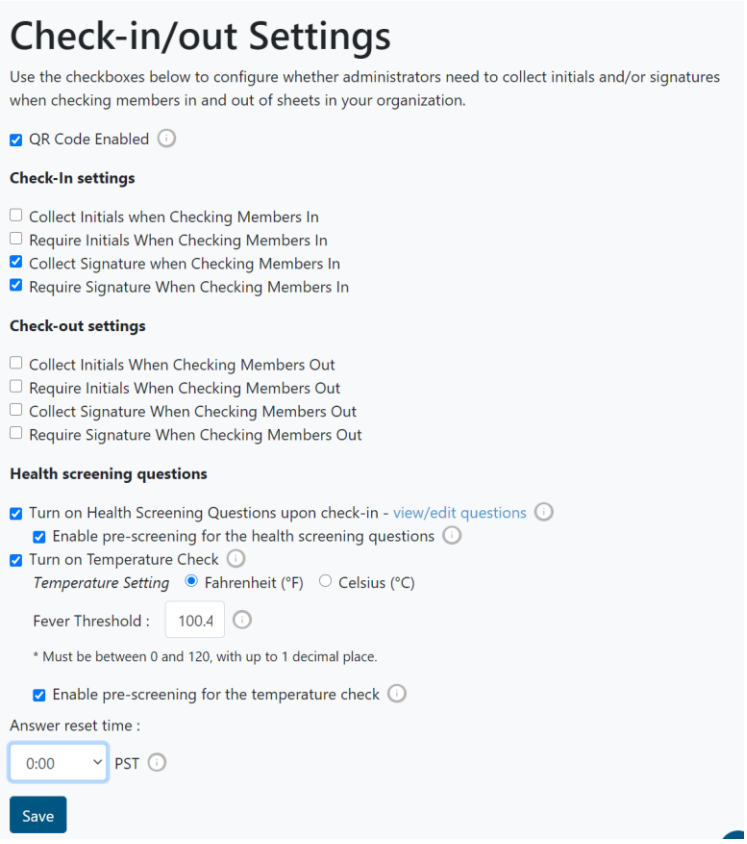
After making changes to your waivers and consents, be sure to send Reconfirmation Requests to your already submitted members so they are prompted to answer the new questions.

ePACT

# Settings – Check-in/out Settings:

Your check-in/out settings allow you to configure how the check-in/out feature collects information in the ePACT Admin App.

**Please be sure to let your Customer Success Manager how long you need to archive your check-in/out sheets.**




"QR Code Enabled" allows users to check in using their personal QR code instead of their signatures for a contact-less experience. Please note that if you enable this, it will be the default to check members in/out and to load pre-screening health questions. However, if a member does NOT have a code, you can switch to "Manual" mode.

"Collect Initials" or "Collect Signature" means that this option will be presented to parents, but they can skip this portion.

"Require Initials" or "Require Signature" means that parents will be required to provide these to complete the check-in our check-out process. If you choose to require either, please be sure to also enable "Collect Initials" and/or "Collect Signature" respectively.

"Turn on Health Screening Questions upon check-in" means that admins will be required to collect responses to a set of health screening questions for each member before check-in.

"Turn on Temperature Check" means that admins will be required to check the temperature of each member before each check-in.

"Fever Threshold" is the temperature allowed before a member fails a pre-screening. For example, if the threshold is 100.4, and their temperature is 100.5, they will be marked as a 'Fail'.

"Enable pre-screening for the health screening questions" allows legal guardians to answer the health screening questions on their own device and submit it to your organization each day. This will save your admins time when checking in large amounts of members, since they will not have to collect this information themselves.

"Enable pre-screening for the temperature check" allows legal guardians to record the temperature of the member they are checking in on their own device and submit it to your organization each day. This will save your admins time when checking in large amounts of members, since they will not have to collect this information themselves.

"Answer reset time" is the time each day members pre-screening answers (for health questions and temperature check) are reset. This prevents guardians from submitting answers too early or reusing the same answers for multiple days. The reset time is set as Pacific Standard Time.

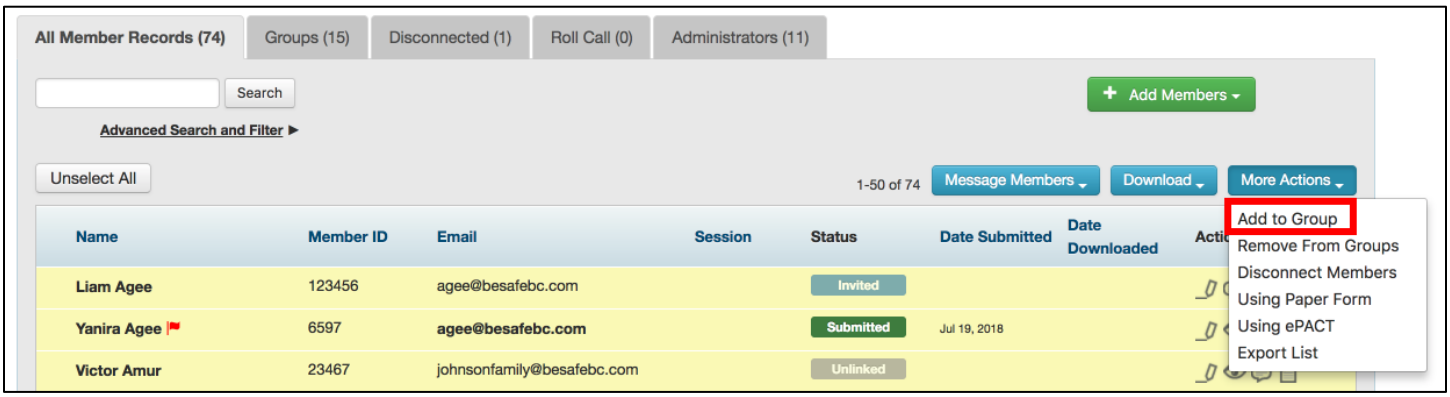
Be sure to click **Save** when you are done making your selections.

ePACT

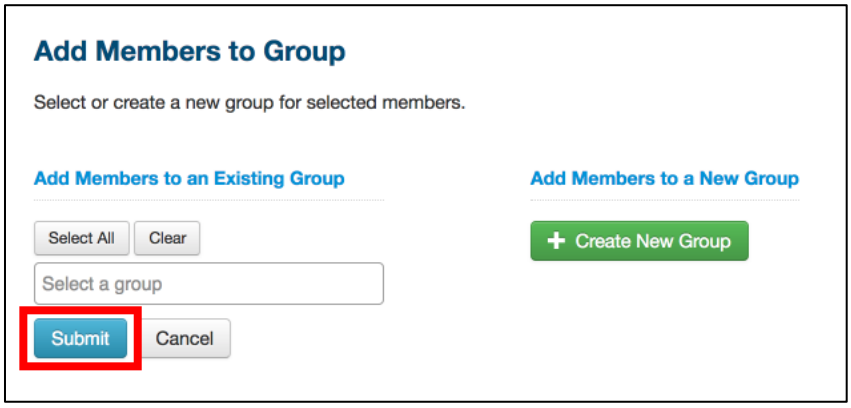
# More Actions – Add Group:

Use the Groups function to keep your members organized, by sports teams, grade or department. Groups should be added using the API or spreadsheet, **the Advanced Search and Filter**, or simply sorting by Session to get a list of group members.

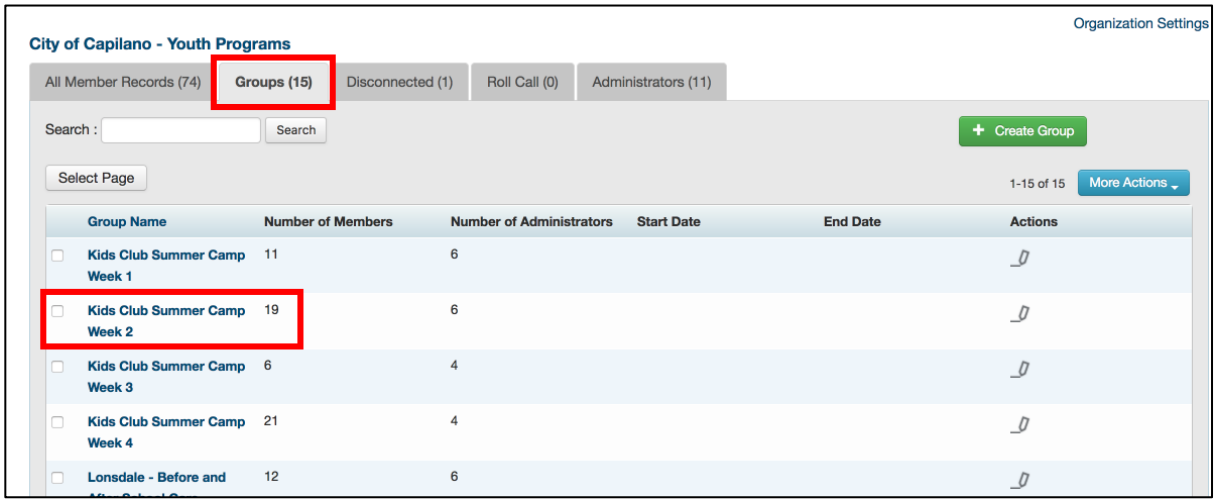
1. After selecting the members you'd like to add to a group, click **Add to Group** from the **More Actions** menu.



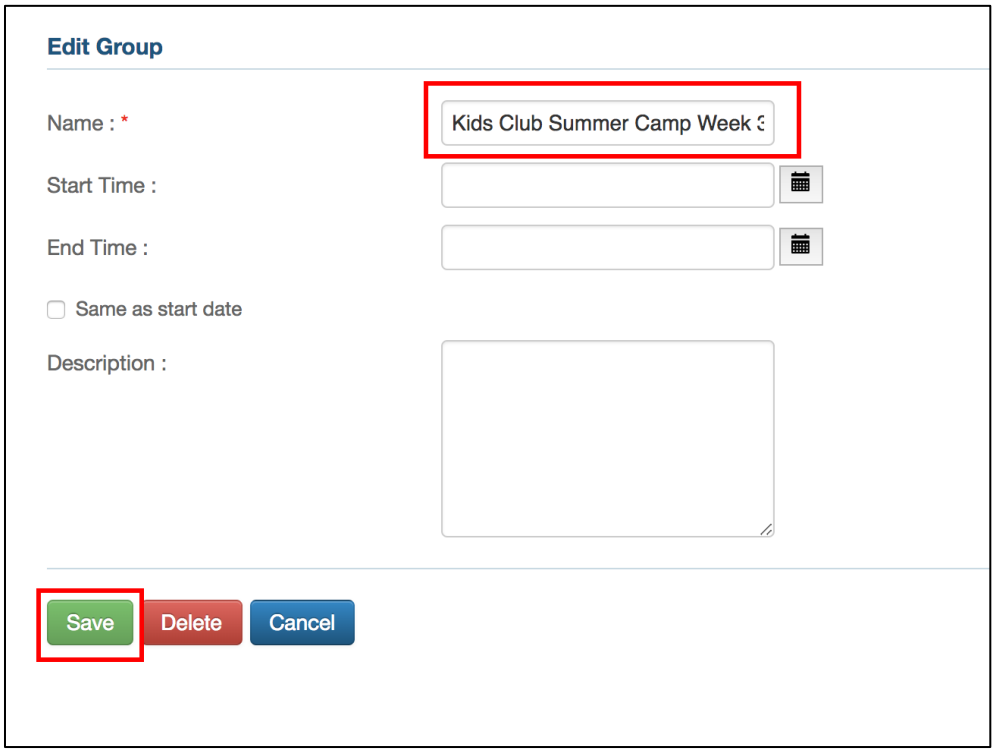

2. Create a Group or the select group to add your members to and **Submit**.




3. The selected members will now appear in both your full member dashboard, and also in the group dashboard. To view the group dashboard, click the **Groups Tab** and select that group.



4. If you need to **Edit a Group Name** you can do so by selecting the **Edit Icon,** updating the group name, and saving.

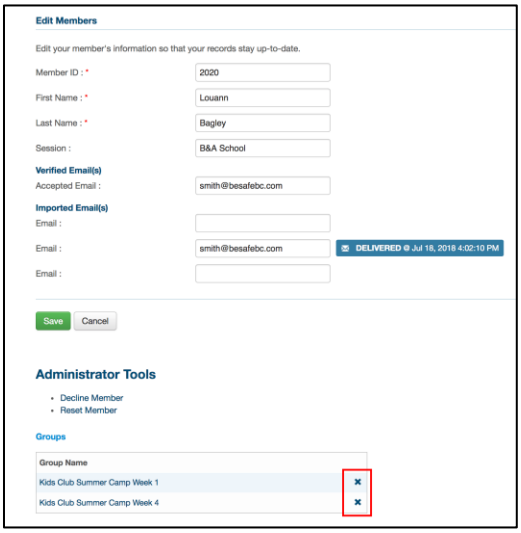



## More Actions – Remove From Groups:

You can remove members from a group in 2 ways:

1. Click on the edit icon on their record. Click on the **X** next to the group from which you'd like to remove them.

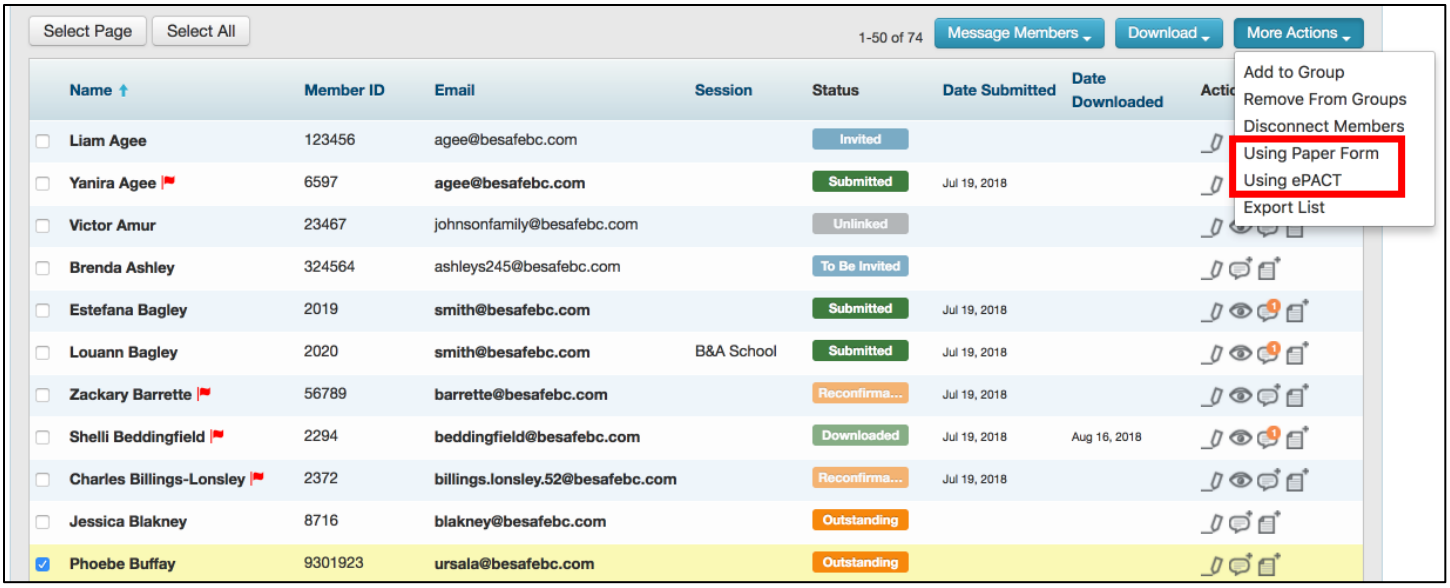
2. Select the record(s) and then click on **More Actions > Remove From Groups**. On the next page, select the groups you would like the members removed from.



ePACT

## More Actions – Members Using Paper Forms/Using ePACT:

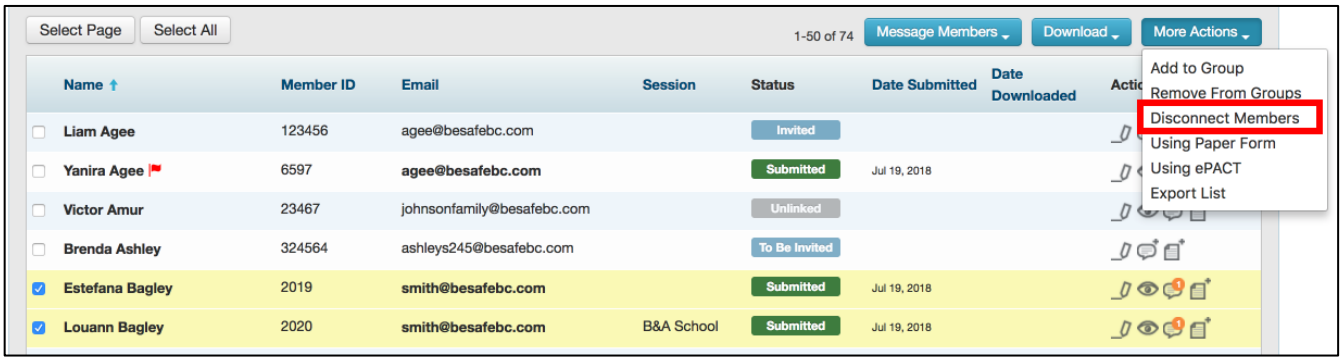
Encouraging all your members to complete an ePACT form will make the management of emergency information much easier. However, some members may still want to complete their emergency information using paper forms.



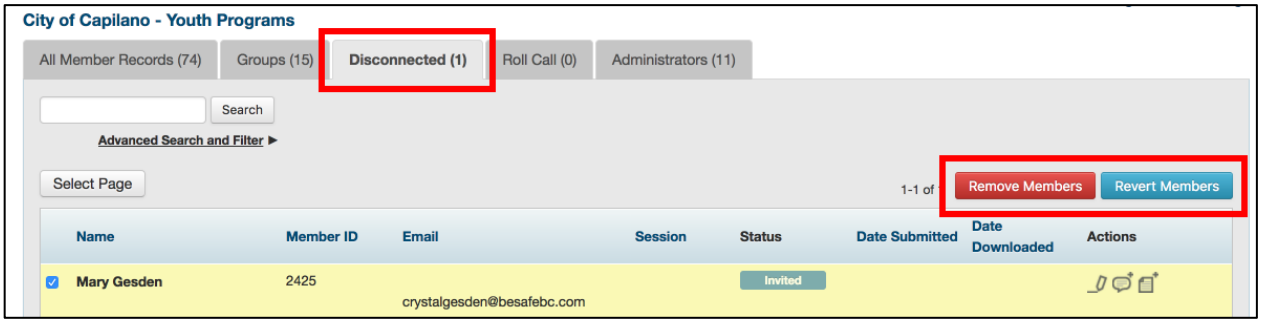

Change their status on ePACT to **Using Paper Form** so that they no longer receive emails to complete their information. Change their status back to **Using ePACT** if they decide to switch back to ePACT. Note that you can still use ePACT's messaging function to communicate with members marked as Using Paper Forms but will not have any of their emergency information in the dashboard.

## More Actions – Disconnect Members:

1. To remove a member(s), select them and then click **More Actions** and **Disconnect Members**

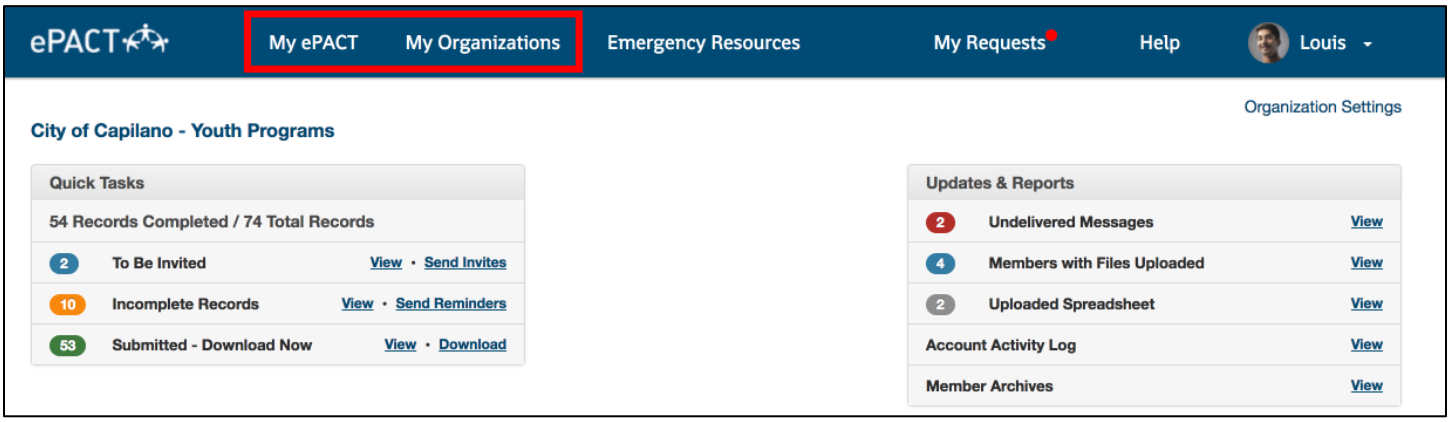



2. Your member(s) will be moved to the **Disconnected** tab. From there, you can either add them back to your records or remove them permanently.




## Switching from Admin to Personal Account:

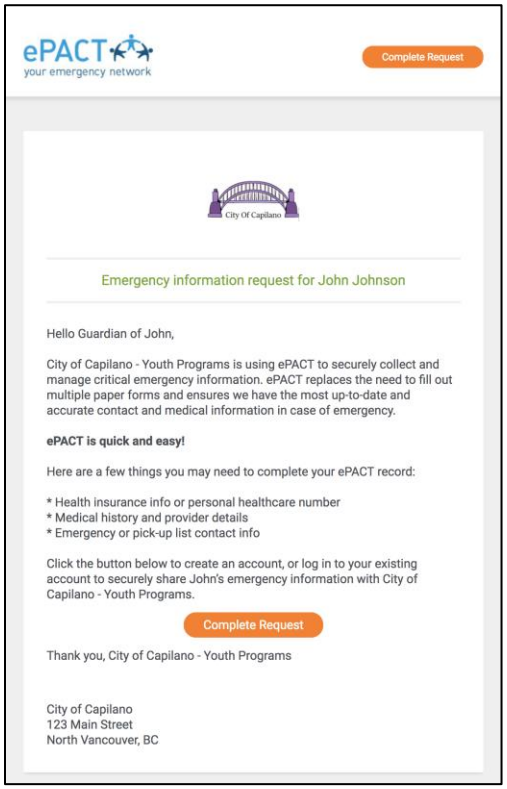
For administrators who also have their own ePACT personal account, you can easily switch between the two accounts in the top right-hand corner.



ePACT

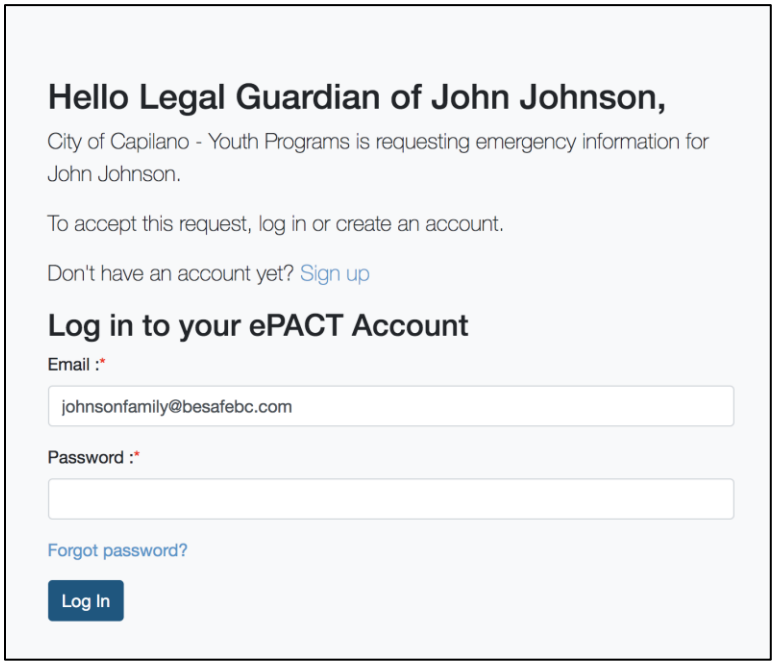
# Family Use

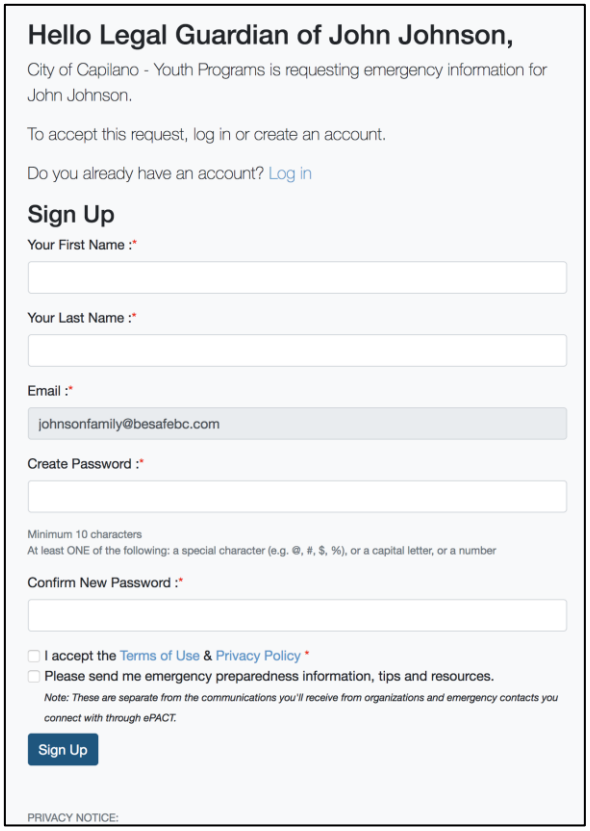
## Accepting a Request and Creating an Account:

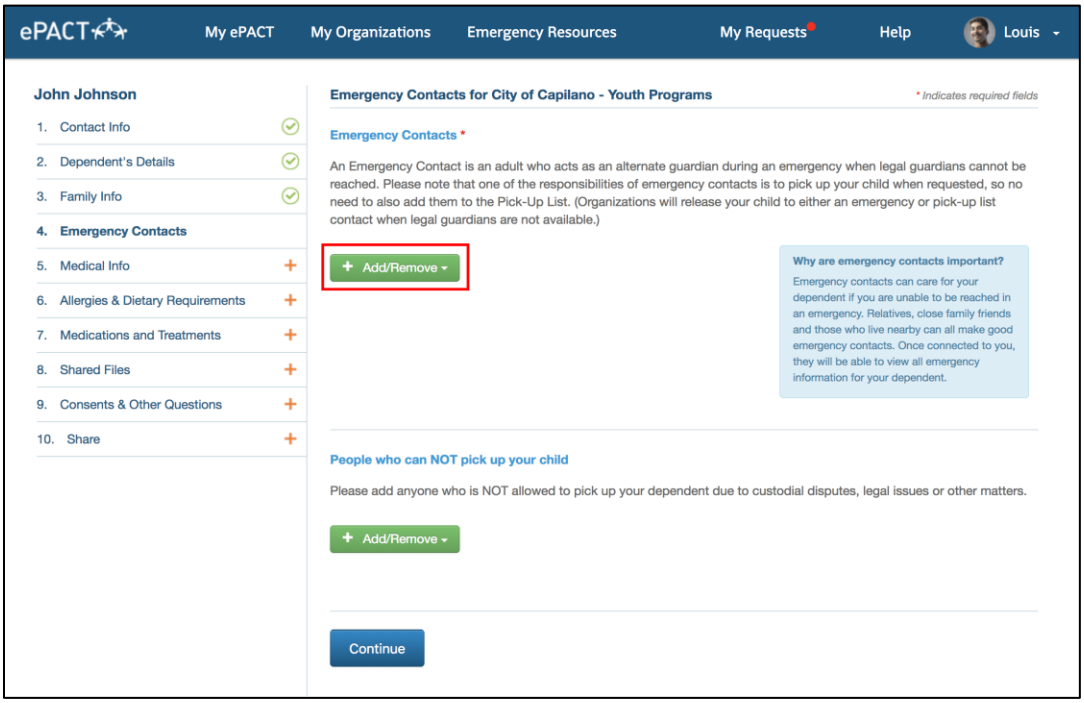



Any time someone is invited to share their emergency information on the ePACT system, they will receive an email invitation to share their emergency information, even If they registered via the API.

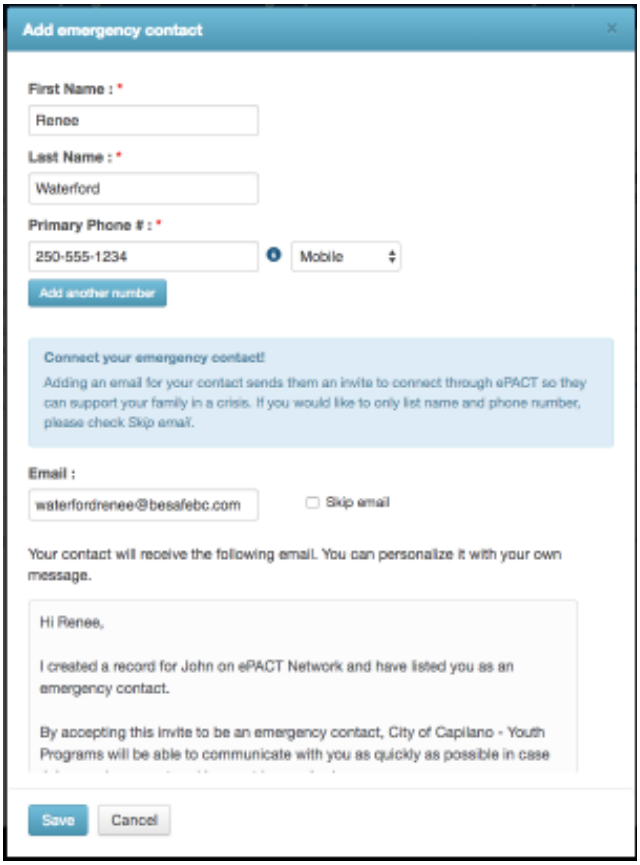
Once they have signed in or a new account is created, members will be able to enter and save their emergency information through an easy step-by-step process.






Members can invite relatives and friends as they build their support network of emergency contacts. An email will be automatically sent to these contacts with instructions on how to connect to the family. (If they do not want to email their contacts, they can check off the **Skip Email** box.) Your organization will also be connected to these contacts, so when they make any changes to their information, you'll automatically have those updates.

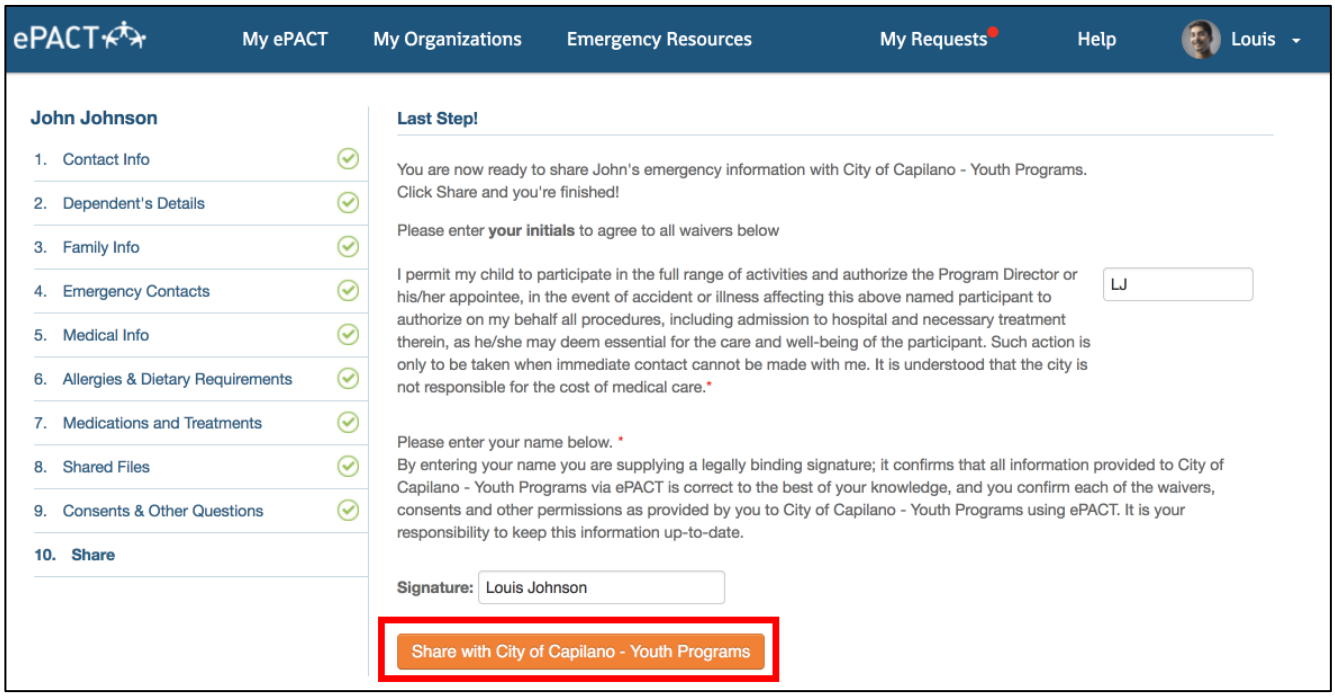


ePACT

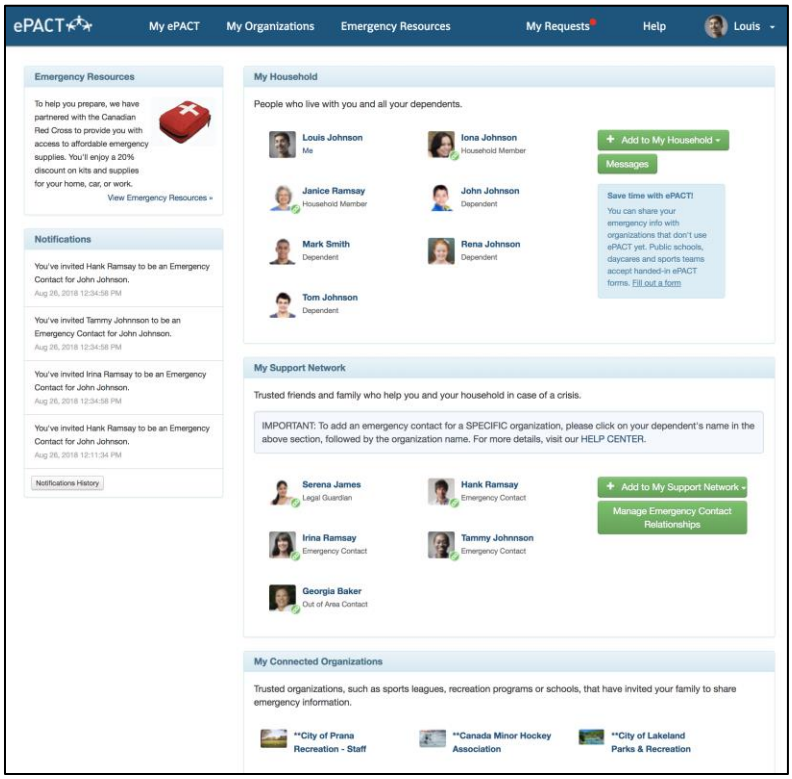
## Sharing Information with your Organization:

Once a member completes all the required emergency information fields, they will be able to share it with your organization.

**Emergency information will not be shared unless members accept the waivers and click the Share button in the last step.**



All members have their own My ePACT dashboard where they can access all their contacts and the organizations they've connected with.




For help with their accounts, members should click on **Help** to access our **Help Center.**

If you have any additional questions, feel free to reach out to our Customer Success Managers.