

Group Admins: Getting to Know the ePACT System

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Getting Started

Someone from your organization 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.

Your Member Dashboard

Once you have accepted your invitation, you will be able to access your members' emergency information (including their email addresses and status) on your **Member Dashboard**.



My ePACT
My Organizations
Emergency Resources
My Requests
Help


Louis

City of Capilano - Youth Programs
Organization Settings

Quick Tasks

54 Records Completed / 72 Total Records

2

To Be Invited
View • Send Invites

9

Incomplete Records
View • Send Reminders

53

Submitted - Download Now
View • Download

Updates & Reports

1

Undelivered Messages
View

4

Members with Files Uploaded
View

2

Uploaded Spreadsheet
View

Account Activity Log
View

Member Archives
View

All Member Records (72)
Groups (15)
Disconnected (1)
Roll Call (0)
Administrators (11)

Search

+ Add Members



















































Advanced Search and Filter

Select Page
Select All

1-50 of 72
Message Members
Download
More Actions

Name	Member ID	Email	Session	Status	Date Submitted	Date Downloaded	Actions
<input type="checkbox"/> Liam Agee	123456	agee@besafebc.com		Invited			
<input type="checkbox"/> Yanira Agee	6597	agee@besafebc.com		Submitted	Jul 19, 2018		
<input type="checkbox"/> Estefana Bagley	2019	smith@besafebc.com		Submitted	Jul 19, 2018		
<input type="checkbox"/> Louann Bagley	2020	smith@besafebc.com		Submitted	Jul 19, 2018		

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

Select Page		Select All		1-50 of 74		Message Members	Download	More Actions
Name	Member ID	Email	Session	Status	Date Submitted	Date Downloaded	Actions	
<input type="checkbox"/> Liam Agee	123456	agee@besafebc.com		Invited			 	
<input type="checkbox"/> Yanira Agee 	6597	agee@besafebc.com		Submitted	Jul 19, 2018		  	
<input type="checkbox"/> Victor Amur	23467	johnsonfamily@besafebc.com		Unlinked			 	
<input type="checkbox"/> Brenda Ashley	324564	ashleys245@besafebc.com		To Be Invited			 	
<input type="checkbox"/> Estefana Bagley	2019	smith@besafebc.com		Submitted	Jul 19, 2018		  	
<input type="checkbox"/> Louann Bagley	2020	smith@besafebc.com		Submitted	Jul 19, 2018		  	
<input type="checkbox"/> Zackary Barrette 	56789	barrette@besafebc.com		Reconfirma...	Jul 19, 2018		  	
<input type="checkbox"/> Shelli Beddingfield 	2294	beddingfield@besafebc.com		Downloaded	Jul 19, 2018	Aug 16, 2018	  	
<input type="checkbox"/> Charles Billings-Lonsley 	2372	billings.lonsley.52@besafebc.com		Reconfirma...	Jul 19, 2018		  	
<input type="checkbox"/> Jessica Blakney	8716	blakney@besafebc.com		Outstanding			 	
<input type="checkbox"/> Phoebe Buffay	9301923	ursala@besafebc.com		Outstanding			 	
<input type="checkbox"/> Sita Chaudry 	2380	chaudry11@besafebc.com		Submitted	Jul 19, 2018		  	
<input type="checkbox"/> Liam Chow	7846	chow@besafebc.cm		Using Paper...			 	
<input type="checkbox"/> Harold Coleman	6658	coleman@besafebc.com		Invited			 	
<input type="checkbox"/> Alice Cooper	2131	fredcooper@besafebc.com		Submitted	Jul 19, 2018		  	
<input type="checkbox"/> Angelina Cooper 	2423	saracooper@besafebc.com		Submitted	Jul 12, 2018		  	
<input type="checkbox"/> 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 hasn't 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.)

















































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.

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.

Select Page		Select All		1-50 of 74		Message Members	Download	More Actions
Name	Member ID	Email	Session	Status	Date Submitted	Date Downloaded	Actions	
<input type="checkbox"/> Liam Agee	123456	agee@besafebc.com		Invited			  	
<input type="checkbox"/> Yanira Agee 	6597	agee@besafebc.com		Submitted	Jul 19, 2018		   	
<input type="checkbox"/> Victor Amur	23467	johnsonfamily@besafebc.com		Unlinked			  	
<input type="checkbox"/> Brenda Ashley	324564	ashleys245@besafebc.com		To Be Invited			  	
<input type="checkbox"/> Estefana Bagley	2019	smith@besafebc.com		Submitted	Jul 19, 2018		   	
<input type="checkbox"/> Louann Bagley	2020	smith@besafebc.com		Submitted	Jul 19, 2018		   	
<input type="checkbox"/> Zackary Barrette 	56789	barrette@besafebc.com		Reconfirma...	Jul 19, 2018		   	
<input type="checkbox"/> Shelli Beddingfield 	2294	beddingfield@besafebc.com		Downloaded	Jul 19, 2018	Aug 16, 2018	   	
<input type="checkbox"/> Charles Billings-Lonsley 	2372	billings.lonsley.52@besafebc.com		Reconfirma...	Jul 19, 2018		   	
<input type="checkbox"/> Jessica Blakney	8716	blakney@besafebc.com		Outstanding			  	
<input type="checkbox"/> Phoebe Buffay	9301923	ursala@besafebc.com		Outstanding			  	
<input type="checkbox"/> Sita Chaudry 	2380	chaudry11@besafebc.com		Submitted	Jul 19, 2018		   	



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

Updates & Reports:

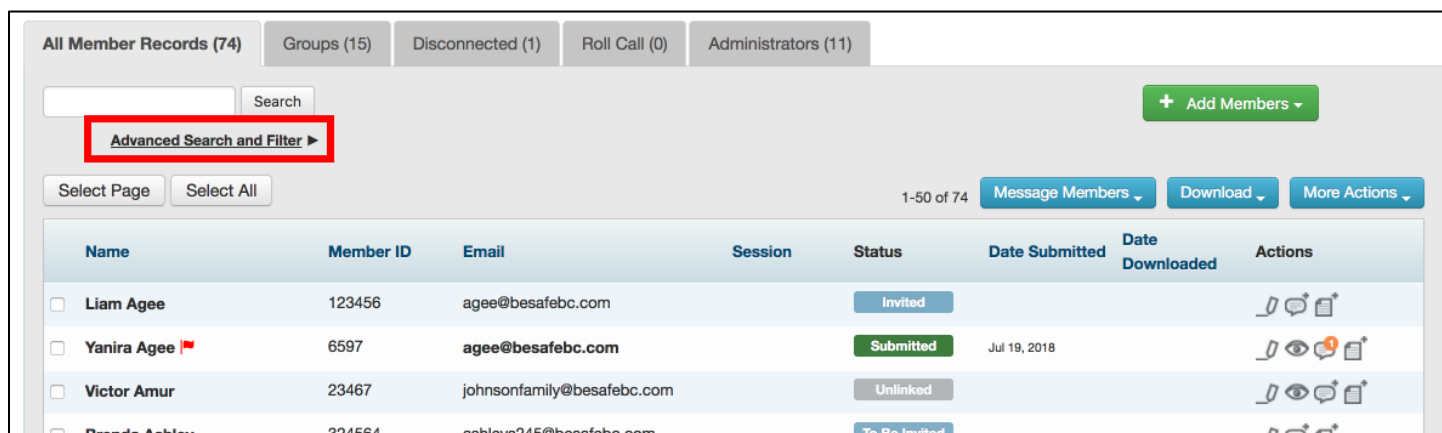
Members with Files Uploaded – Any time a member uploads a file, such as a doctor's note or allergy plan, you will be able to view the member and their files here.

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

Updates & Reports		
38	Members with Files Uploaded	View
	Account Activity Log	View

Advanced Search and Filter:

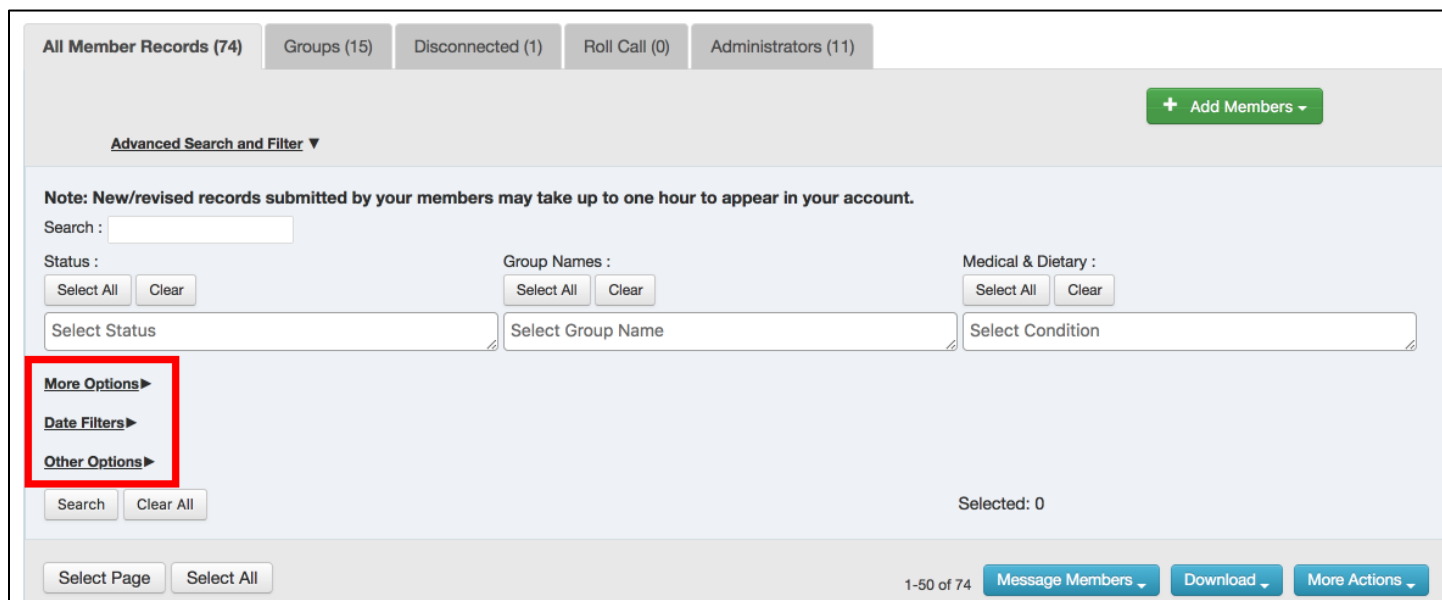
You can use the Search box for a simple search based on a Name, Email, or Member ID. The **Advanced Search and Filter** can be used for a more advanced search using filters like Medical and Dietary Conditions or which members are still Outstanding.



The screenshot shows the top navigation bar with tabs: All Member Records (74), Groups (15), Disconnected (1), Roll Call (0), and Administrators (11). Below the tabs is a search bar with a 'Search' button. A red box highlights the 'Advanced Search and Filter' link. To the right of the search bar is a green '+ Add Members' button. Below the search bar are buttons for 'Select Page', 'Select All', and a pagination indicator '1-50 of 74'. To the right of the pagination are buttons for 'Message Members', 'Download', and 'More Actions'. Below these buttons is a table with the following columns: Name, Member ID, Email, Session, Status, Date Submitted, Date Downloaded, and Actions. The table contains four rows of member data.

Name	Member ID	Email	Session	Status	Date Submitted	Date Downloaded	Actions
<input type="checkbox"/> Liam Agee	123456	agee@besafebc.com		Invited			
<input type="checkbox"/> Yanira Agee	6597	agee@besafebc.com		Submitted	Jul 19, 2018		
<input type="checkbox"/> Victor Amur	23467	johnsonfamily@besafebc.com		Unlinked			
<input type="checkbox"/> Brenda Ashlev	324564	ashlevs245@besafebc.com		To Be Invited			

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



The screenshot shows the 'Advanced Search and Filter' section expanded. At the top, there is a note: 'Note: New/revised records submitted by your members may take up to one hour to appear in your account.' Below the note is a search bar. There are three filter sections: 'Status' with 'Select All' and 'Clear' buttons, 'Group Names' with 'Select All' and 'Clear' buttons, and 'Medical & Dietary' with 'Select All' and 'Clear' buttons. Below these are three dropdown menus: 'Select Status', 'Select Group Name', and 'Select Condition'. A red box highlights three links: 'More Options', 'Date Filters', and 'Other Options'. Below these links are 'Search' and 'Clear All' buttons. At the bottom right, it says 'Selected: 0'. The bottom navigation bar is the same as in the previous screenshot.

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.

All Member Records (74)
Groups (15)
Disconnected (1)
Roll Call (0)
Administrators (11)

+ Add Members

Advanced Search and Filter

Note: New/revised records submitted by your members may take up to one hour to appear in your account.

Search :

Status :

Group Names :

Medical & Dietary :

Select Status Select Group Name Select Condition

More Options

Consents & Other Questions :

Files :

Session :

Select Question Select Files Select Session

Date Filters

You can also add a date filter to your filtered search, or you can filter just for members active in a defined period. You can also quickly filter to see most recent submissions.

Group Start Date From :

Group Start Date To :

Date Submitted From :

Date Submitted To :

Date Downloaded From :

Date Downloaded To :

Other Options

☐ Has Comments
☐ Flagged Conditions
☐ Verified for Texts
☐ Not Verified for Texts

Selected: 0

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

Note: New/revised records submitted by your members may take up to one hour to appear in your account.

Search :

Status :

Group Names :

Medical & Dietary :

Bantam

Trailhead - Hockey Bantam

Select Condition

More Options

Consents & Other Questions :

Files :

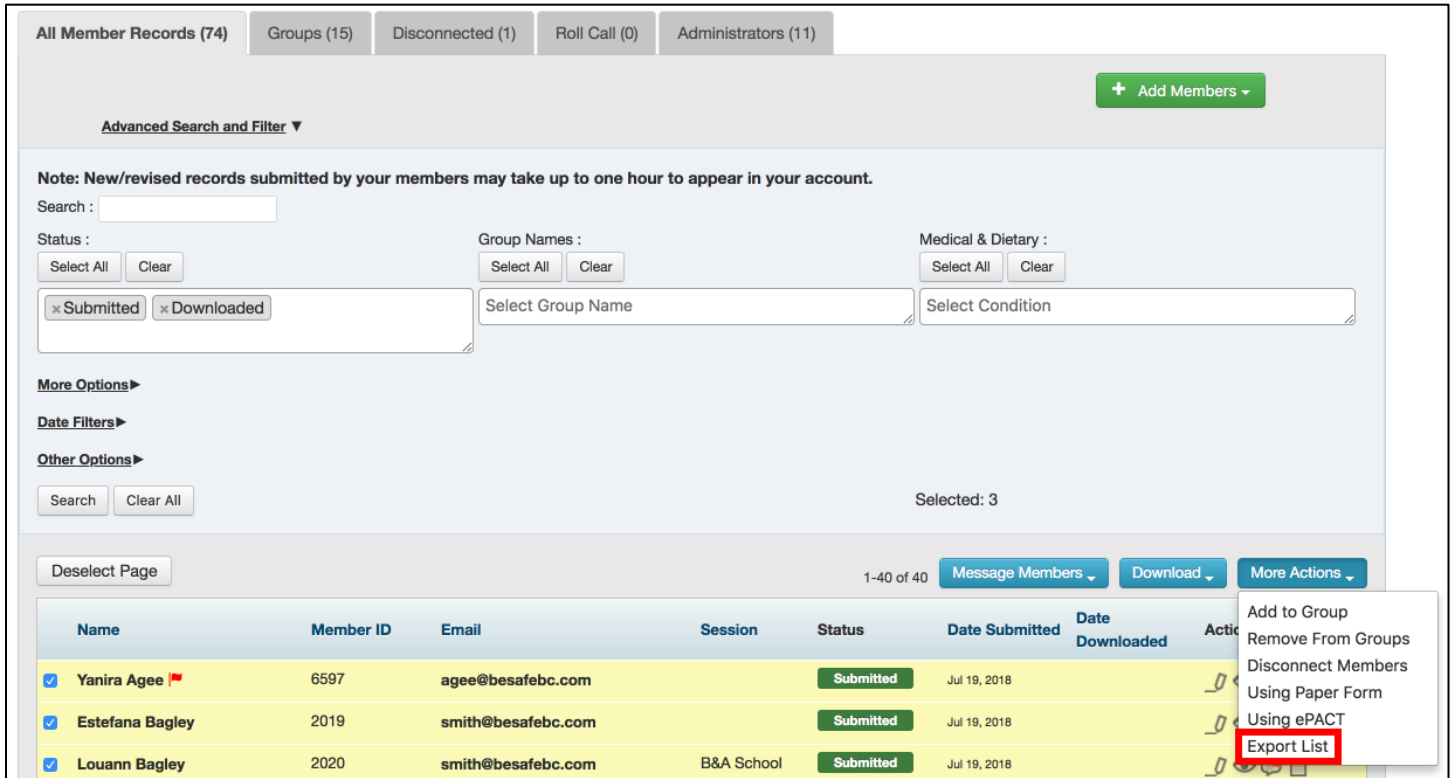
Session :

Select Files Select Session

Date Filters

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.



The screenshot shows the ePACT dashboard with a top navigation bar containing tabs for 'All Member Records (74)', 'Groups (15)', 'Disconnected (1)', 'Roll Call (0)', and 'Administrators (11)'. A green '+ Add Members' button is on the right. Below the tabs is an 'Advanced Search and Filter' section with a search bar, status filters (Submitted, Downloaded), and group/condition filters. A table of member records is displayed below, with columns for Name, Member ID, Email, Session, Status, Date Submitted, and Date Downloaded. The 'More Actions' dropdown menu is open, showing options like 'Add to Group', 'Remove From Groups', 'Disconnect Members', 'Using Paper Form', 'Using ePACT', and 'Export List' (highlighted with a red box).

Name	Member ID	Email	Session	Status	Date Submitted	Date Downloaded	Action
<input checked="" type="checkbox"/> Yanira Agee	6597	agee@besafebc.com		Submitted	Jul 19, 2018		
<input checked="" type="checkbox"/> Estefana Bagley	2019	smith@besafebc.com		Submitted	Jul 19, 2018		
<input checked="" type="checkbox"/> Louann Bagley	2020	smith@besafebc.com	B&A School	Submitted	Jul 19, 2018		

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.

All Member Records (74) Groups (15) Disconnected (1) Roll Call (0) Administrators (11)

Clear All Search + Add Members

Advanced Search and Filter

Deselect Page 1-40 of 40

Message Members Download More Actions

Name	Member ID	Email	Session	Status	Added	Actions
<input checked="" type="checkbox"/> Yanira Agee	6597	agee@besafebc.com		Submitted		
<input checked="" type="checkbox"/> Estefana Bagley	2019	smith@besafebc.com		Submitted		
<input checked="" type="checkbox"/> Louann Bagley	2020	smith@besafebc.com	B&A School	Submitted		
<input checked="" type="checkbox"/> Shelli Beddingfield	2294	beddingfield@besafebc.com		Downloaded	Jul 19, 2018 Aug 16, 2018	
<input checked="" type="checkbox"/> Sita Chaudry	2380	chaudry11@besafebc.com		Submitted	Jul 19, 2018	

- 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 are done.

Click the button below to create an account, or log in to your existing account to securely share {memberFirstName}'s emergency information with {organizationName}.

Complete Request


File Edit Insert View Format Tools

Thank you, {organizationName}

City of Capilano
123 Main Street
North Vancouver, BC

Preview Message Cancel

- 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**.



Emergency information request for {memberFirstName}
{memberLastName}

Hello Guardian of {memberFirstName},

{organizationName} is using ePACT to securely collect and manage critical emergency information. ePACT replaces the need to fill out multiple paper forms and ensures we have the most up-to-date and accurate contact and medical information in case of emergency.

ePACT is quick and easy!

Here are a few things you may need to complete your ePACT record:

- * Health insurance info or personal healthcare number
- * Medical history and provider details
- * Emergency or pick-up list contact info

Click the button below to create an account, or log in to your existing account to securely share {memberFirstName}'s emergency information with {organizationName}.

[Complete Request](#)

Thank you, {organizationName}

City of Capilano
123 Main Street
North Vancouver, BC

Have questions or feedback?

Visit our [Help Center](#) for all the answers to your ePACT questions, including articles, videos, and live chat with our Customer Success Team.

Contact us seven days a week at help@epactnetwork.com

Call 1-855-773-7228 Monday – Friday from 9am – 5pm PST

ePACT Network Ltd
267 West Esplanade, Unit 105, North Vancouver, BC, V7M 1A5
www.epactnetwork.com • info@epactnetwork.com • 1-855-773-7228

[Contact Us](#)
[Terms of Use](#)
[Privacy Policy](#)
[Security](#)

[Send Invite](#)
[Back to Dashboard](#)

- You are all done! After sending, a confirmation page will display a list of all the email recipients.

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



[My ePACT](#)
[My Organizations](#)
[Emergency Resources](#)
[My Requests](#)
[Help](#)


Louis ▾

Send a Message

Who should receive this message?

☒ Include legal guardians

☐ Include emergency contacts

[Review Message](#)
[Back to Dashboard](#)

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.

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

City of Capilano - Youth Programs
Organization Settings

Quick Tasks

54 Records Completed / 74 Total Records

- 2 To Be Invited [View](#) • [Send Invites](#)
- 10 Incomplete Records [View](#) • [Send Reminders](#)
- 53 Submitted - Download Now [View](#) • [Download](#)

Updates & Reports

- 2 Undelivered Messages [View](#)
- 4 Members with Files Uploaded [View](#)
- 2 Uploaded Spreadsheet [View](#)
- Account Activity Log [View](#)
- Member Archives [View](#)

[All Member Records \(74\)](#)
[Groups \(15\)](#)
[Disconnected \(1\)](#)
[Roll Call \(0\)](#)
[Administrators \(11\)](#)

[Advanced Search and Filter](#) ▶

1-50 of 53

Name	Member ID	Email	Session	Status	Date Submitted	Date Downloaded	Records Files
Yanira Agee	6597	agee@besafebc.com		Submitted	Jul 19, 2018		
Estefana Bagley	2019	smith@besafebc.com		Submitted	Jul 19, 2018		
Louann Bagley	2020	smith@besafebc.com	B&A School	Submitted	Jul 19, 2018		

You can choose to download the forms together or separately (if you have more than one form to download, like an emergency record and a release form).

- 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.

ePACT
My ePACT
My Organizations
Emergency Resources
My Requests ●

Download Members

Documents will be in PDF format.

Total Downloadable Members: 1

Member IDs can be things like registration #s, employee #s, and bib #s.

☐ Download in order of Member ID

Download

Cancel

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.

<input type="checkbox"/>	Phoebe Buffay	9301923	ursala@besafebc.com	Outstanding		
<input type="checkbox"/>	Sita Chaudry	2380	chaudry11@besafebc.com	Submitted	Jul 19, 2018	
<input type="checkbox"/>	Liam Chow	7846	chow@besafebc.com	Using Paper...		

2. To add a file, click on **Upload File**. You will 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**).

The screenshot shows the ePACT interface for a member named Angelina Cooper. The top navigation bar includes links for My ePACT, My Organizations, Emergency Resources, My Requests, Help, and a user profile for Louis. The main content area is titled "Angelina Cooper's Files" and includes a link to "Return to Member Records". Below this, there are two sections: "Added by City of Capilano - Youth Programs" and "Added by Member". The "Added by City of Capilano" section shows a file named "Allergy Plan" (emergency_care_plan.pdf) uploaded on Jul 18, 2018, with a "Download" button. The "Added by Member" section shows a message: "Angelina Cooper has not yet uploaded any files to City of Capilano - Youth Programs." At the bottom, there are buttons for "Download All" and "Upload File".

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.

The screenshot shows the ePACT interface with the "My ePACT" tab selected in the top navigation bar. The main content area is titled "City of Capilano - Youth Programs" and includes a link to "Organization Settings". Below this, there are two sections: "Quick Tasks" and "Updates & Reports". The "Quick Tasks" section shows a summary of 54 Records Completed / 74 Total Records, with a list of tasks: "To Be Invited" (2), "Incomplete Records" (10), and "Submitted - Download Now" (53). The "Updates & Reports" section shows a list of updates: "Undelivered Messages" (2), "Members with Files Uploaded" (4), and "Uploaded Spreadsheet" (2). At the bottom, there are links for "Account Activity Log" and "Member Archives".

ePACT's Mobile App

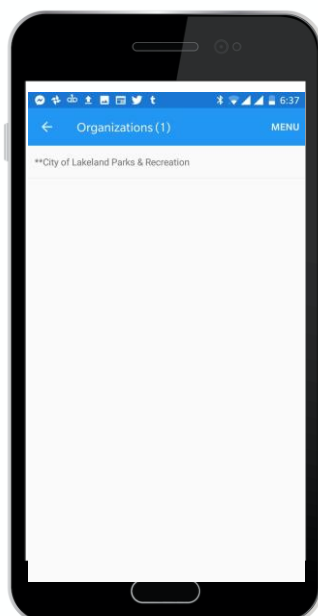
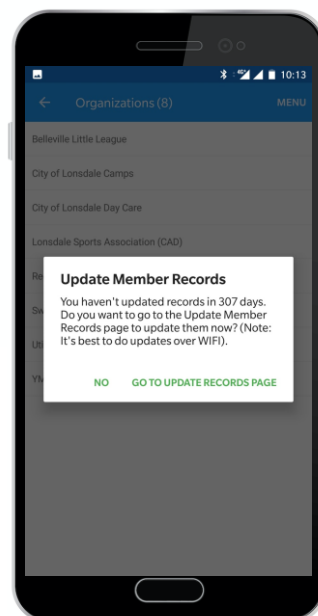
Getting Started

The ePACT administrator app is available for free download. The app only works for administrators so you will be unable to log in until you have accepted your invitation.

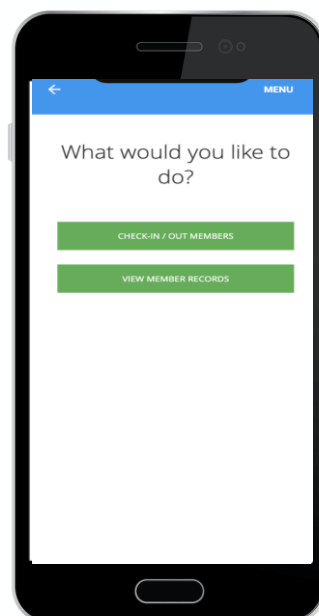


Log in using your ePACT login. If using a personal device, you can enable quick login (fingerprint, face ID, etc.)

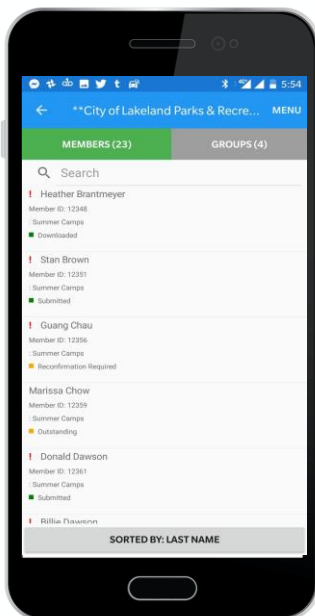
You will be prompted to download records if you have not down so in the last 7 days - this is a crucial step in ensuring your records are available offline. If it has been shorter than 7 days, you can update records from the menu.



Select the organization name and then either View Member Records or Check In / Out. Note that if you are not using the Check In feature, you will be brought directly to your member records.

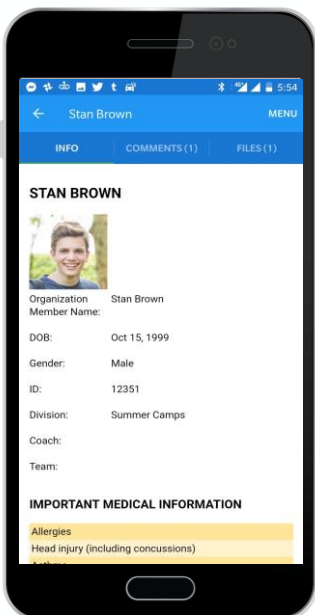
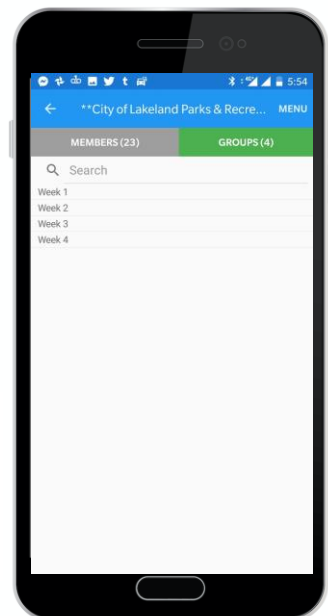


View Member Records



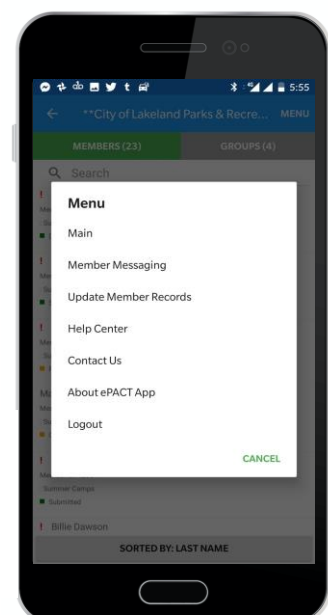
View member Records shows you a list of all the members in your groups. Exclamation marks indicate an important medical condition and record statuses are shown. You can quickly search for a specific member in the search bar.

If you are an administrator for multiple groups, you can toggle to the Groups tab to view lists of members organized by group.



Once you find the file you are looking for, click on it to view. Important medical conditions are in yellow at the top. Scroll down to see your participant's contact info. You can also view or add comments and access files for each member.

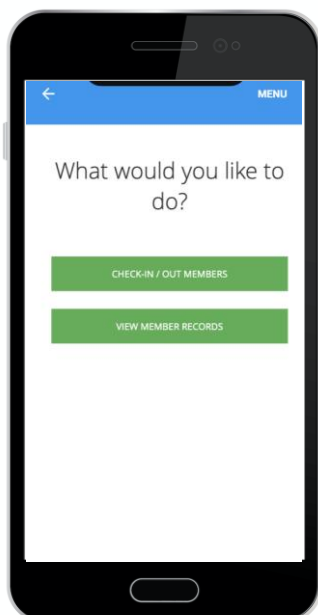
If you need to communicate with your members' families from the app, click on Menu on this page to access our Communications tools.





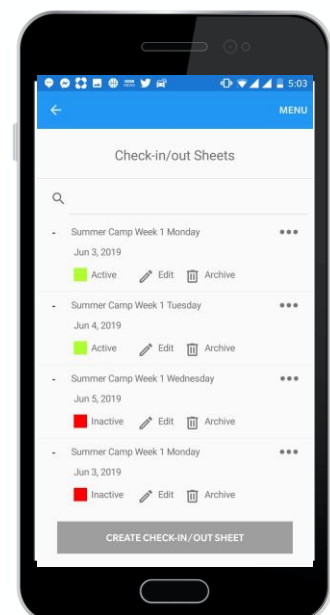
You can send both emergency and general messages via email, text, and voice message if your organization is using this feature.

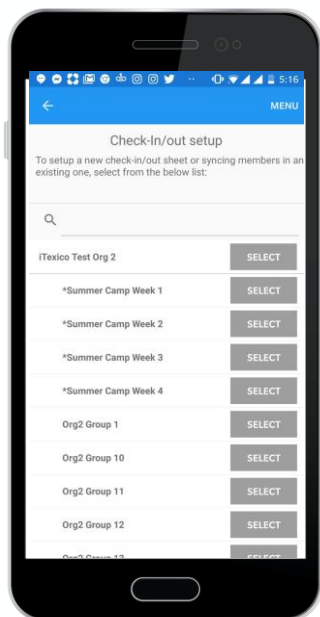
Check In / Out



If your organization is using Check In / Out, select it after logging in to access.

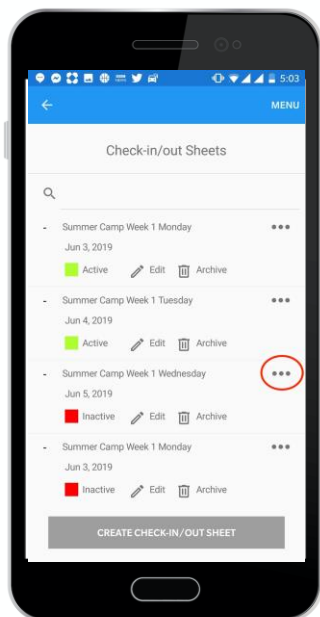
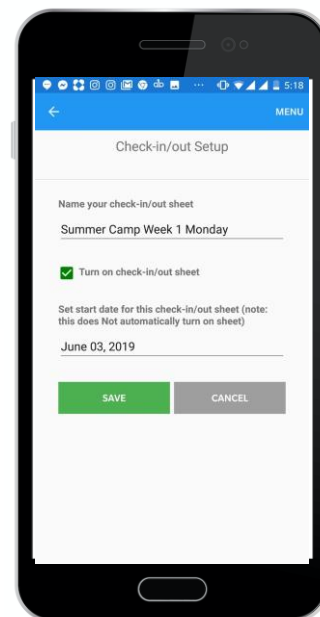
Check in Sheets can be created ahead of time and can be activated when needed. To create a new one, click on "Create Check In/Out Sheet".





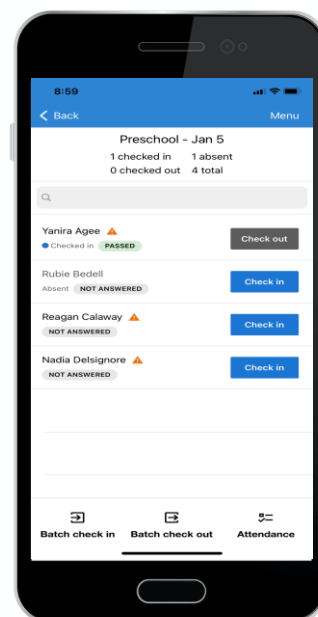
Choose a group session to include in the Check-in Sheet.

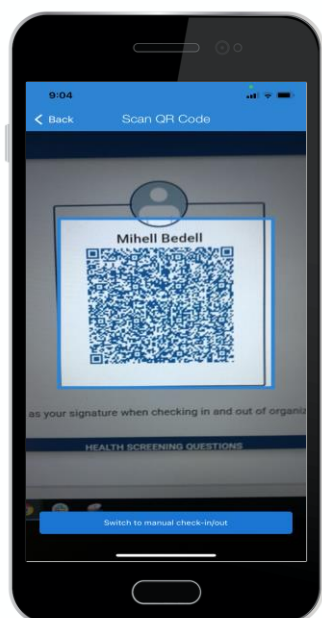
Name the sheet as needed. Naming specifically is helpful for easy reference later. If creating ahead of time, do not check the box to turn the sheet on.



Sheets must be active before using. Click on the three dots to select "Turn On". This is also where you can "Sync Sheets". It is a good idea to sync each sheet before use to be sure you have the most updated member list.

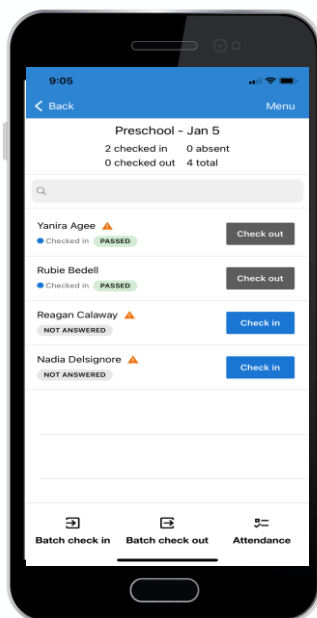
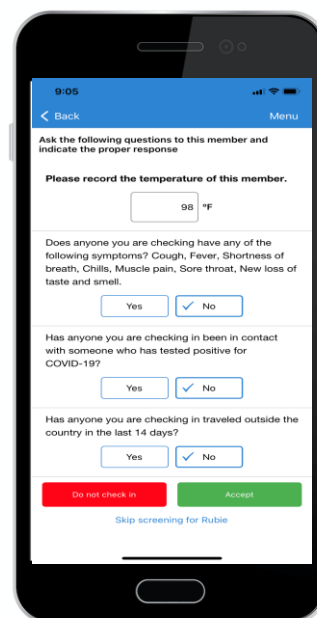
If you are using Health Screening, in the check in sheet, you will be able to see if the member has completed the questions ahead of time.





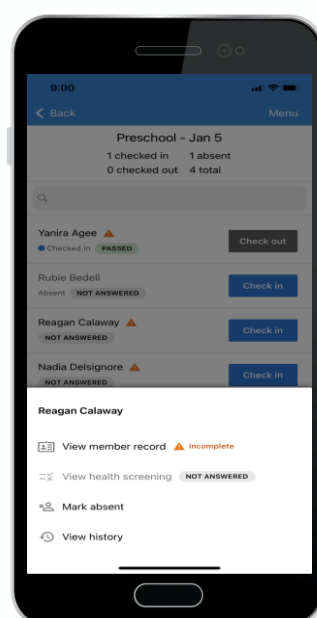
Select the member to check them in. If QR code is enable, a camera will open to scan the parent's unique code. This will act as their signature. If no QR code is available, select switch to manual check-in and you will be prompted to pick the name of the person checking them in from the pick-up list.

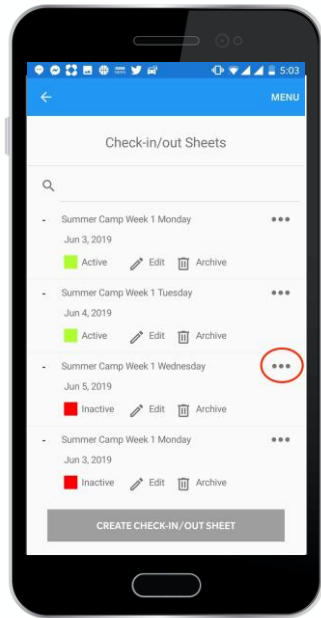
If pre-screening was completed, the health screening questions will pre-fill. If doing manual check-in, you can complete the questionnaire with the member upon check-in.



From your check-in sheet, you will be able to quickly see who has passed or failed the health screening questions. To check-out members at the end of the day, select Check out and repeat the steps.

Click on a member's name from the check in sheet to quickly view the member record, view the health questions, mark absent, or view their check-in history.





IMPORTANT: When you are finished with your check-in sheet at the end of the day, make sure to archive it.

Select the three dots, turn off, and then the Archive button. This will give administrators access to the Check in/out history.

For other helpful training resources, including videos and FAQs, visit the Epact Help Center.

<https://epactnetwork.freshdesk.com/support/home>