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**.

Status:

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

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.

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Actions:

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		

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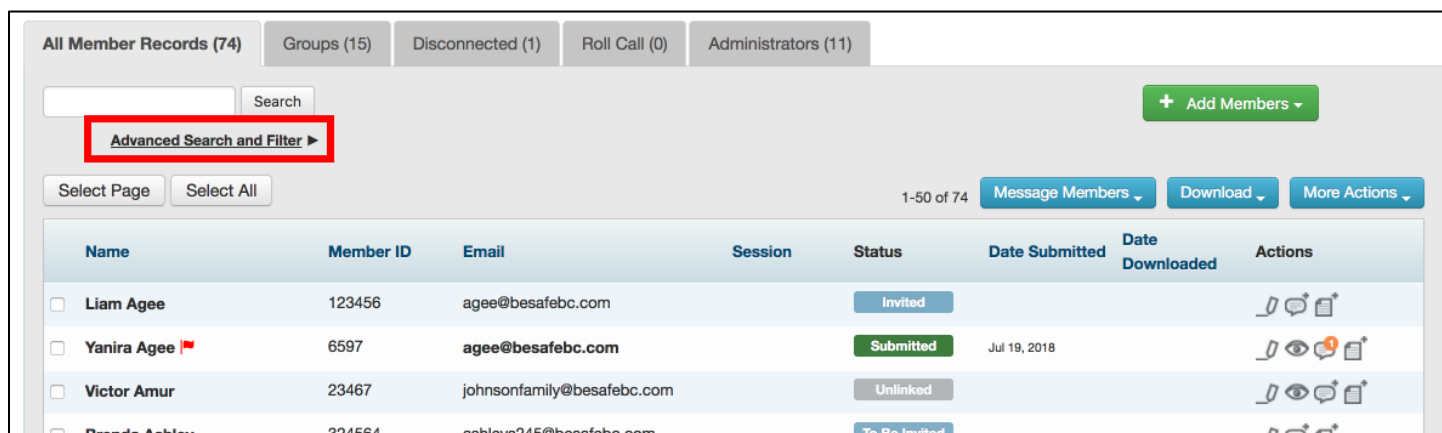
Members with Files Uploaded – Any time a member uploads a file, such as a doctor's note or allergy plan, you will be able to view the member and their files here.

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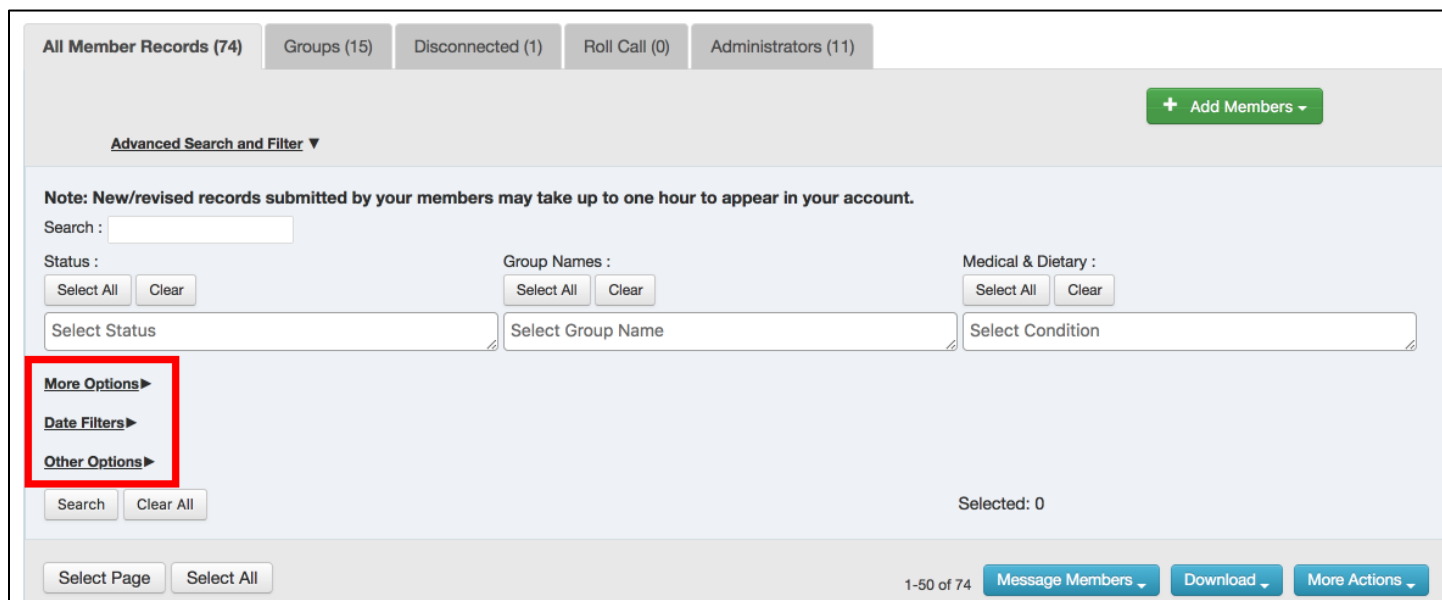
You can use the Search box for a simple search based on a Name, Email, or Member ID. The **Advanced Search and Filter** can be used for a more advanced search using filters like Medical and Dietary Conditions or which members are still Outstanding.

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.

You can also **type** in the select field instead of scrolling through each filter for a specific criterion.
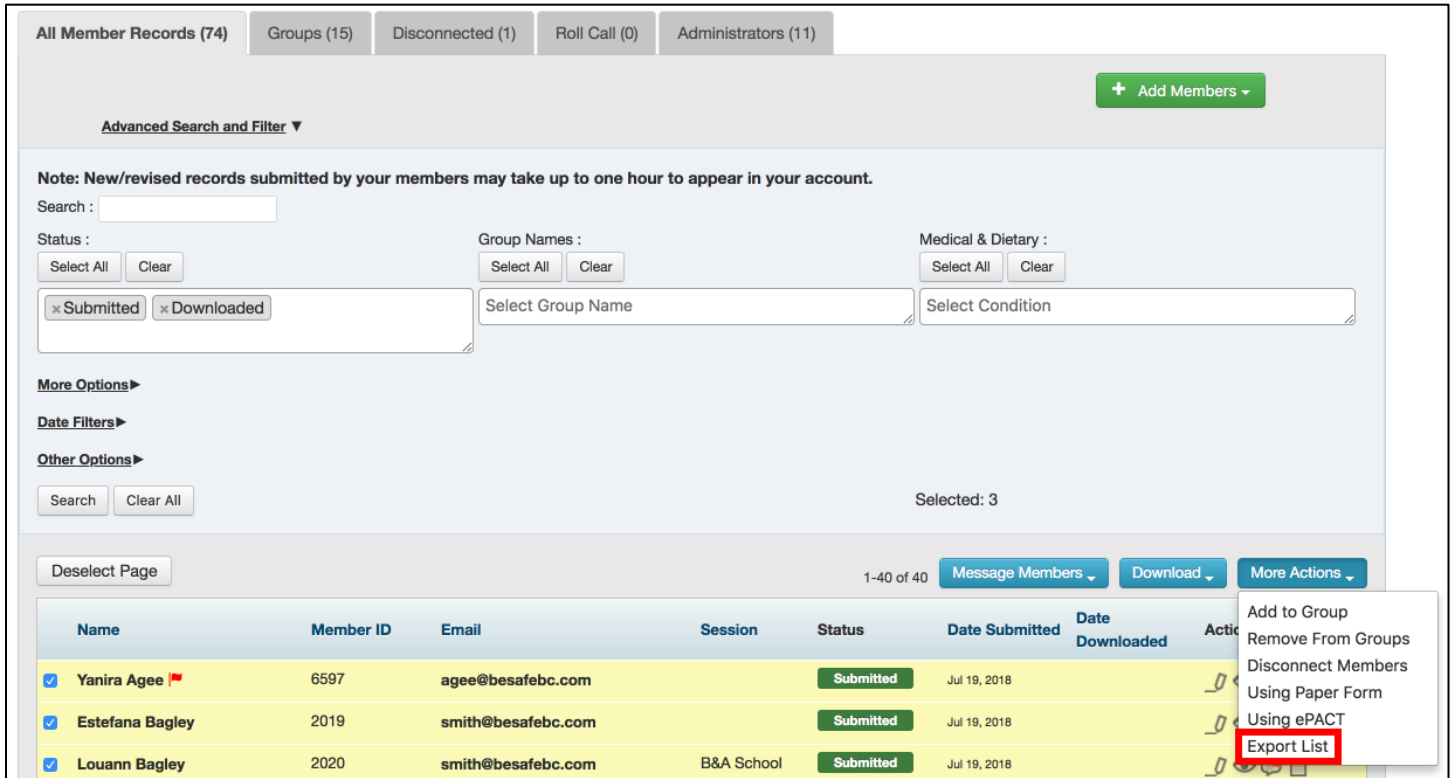
Once you have determined your filters, click **Search** to get a list. You can select all and click **Download > Records** to download all the records matching your search filters. If you want to sort within your search and filter finding, be sure to click the heading afterwards. Also, *be sure to click **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.

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 are 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**.

5. 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.

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**.

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).

2. 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.

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 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**).

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'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.
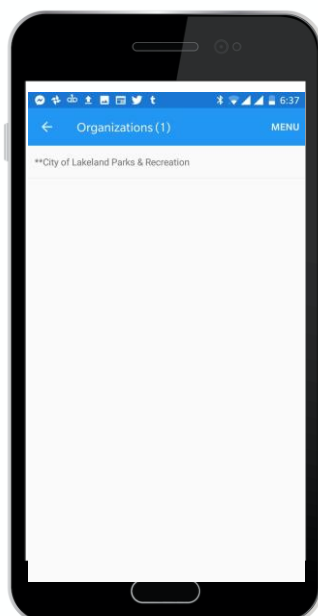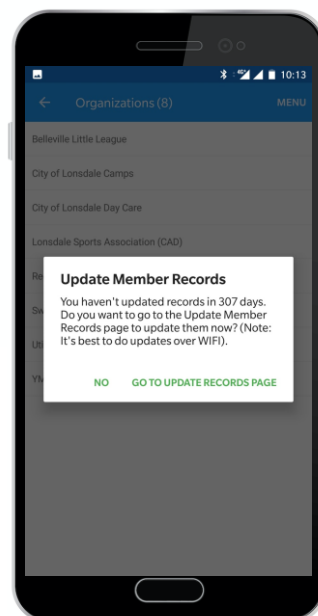
Select the organization name and then either View Member Records or Check In / Out. Note that if you are not using the Check In feature, you will be brought directly to your member records.
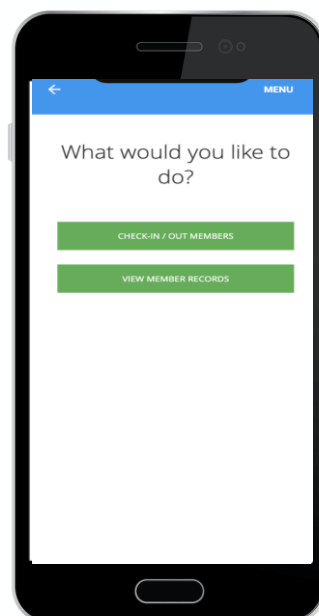
View Member Records
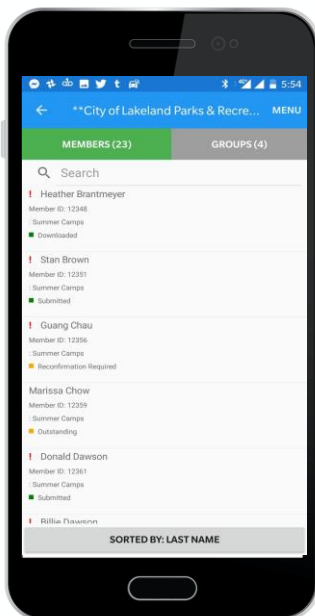
View member Records shows you a list of all the members in your groups. Exclamation marks indicate an important medical condition and record statuses are shown. You can quickly search for a specific member in the search bar.

If you are an administrator for multiple groups, you can toggle to the Groups tab to view lists of members organized by group.
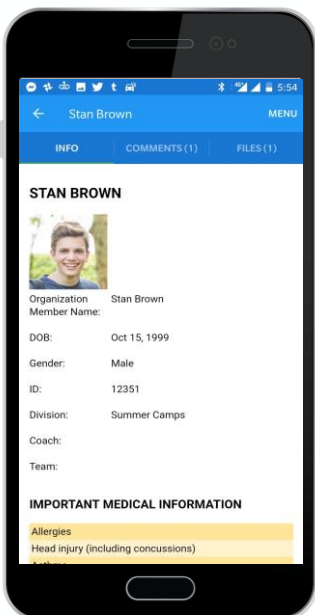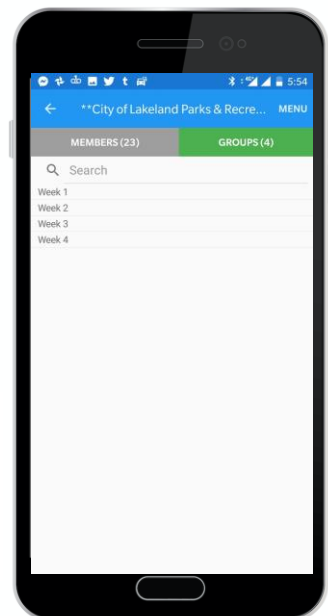
Once you find the file you are looking for, click on it to view. Important medical conditions are in yellow at the top. Scroll down to see your participant's contact info. You can also view or add comments and access files for each member.

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

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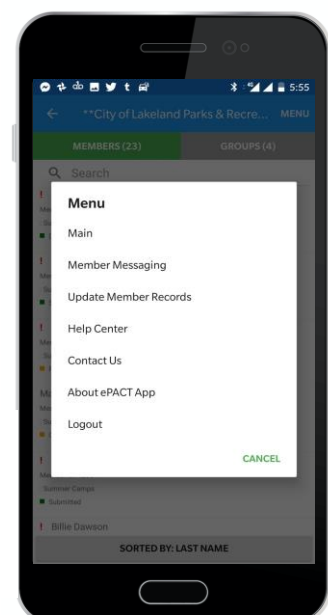
You can send both emergency and general messages via email, text, and voice message if your organization is using this feature.

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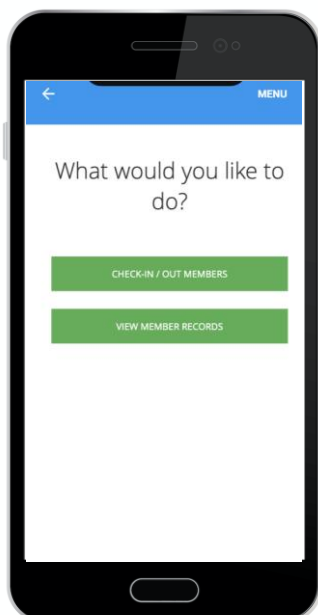
If your organization is using Check In / Out, select it after logging in to access.

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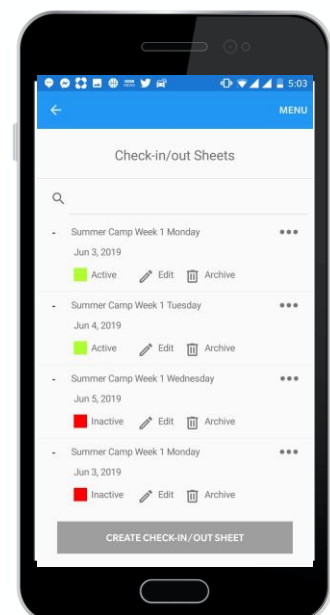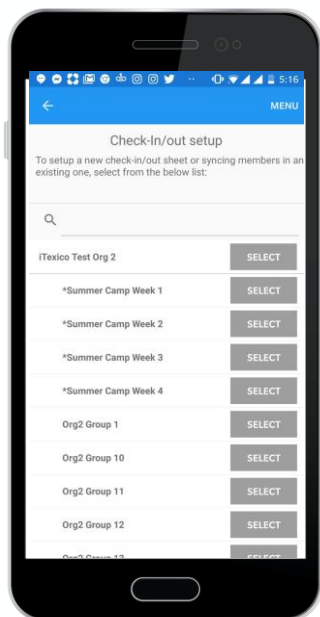
Choose a group session to include in the Check-in Sheet.

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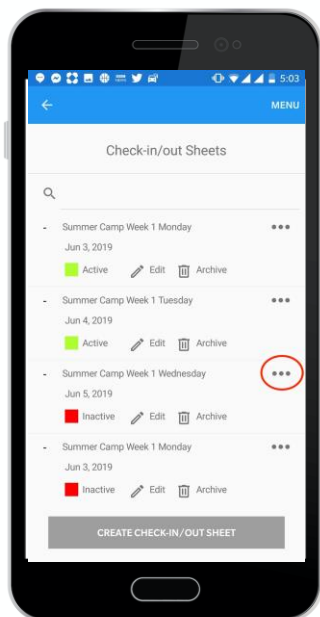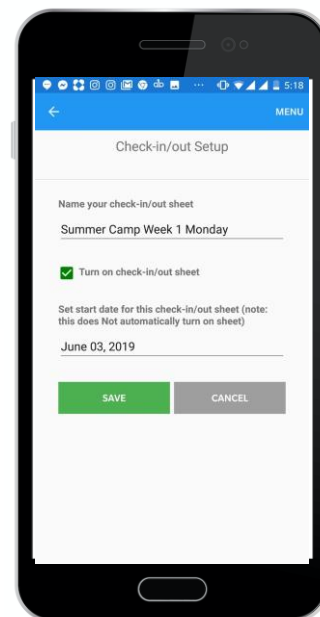
Sheets must be active before using. Click on the three dots to select "Turn On". This is also where you can "Sync Sheets". It is a good idea to sync each sheet before use to be sure you have the most updated member list.

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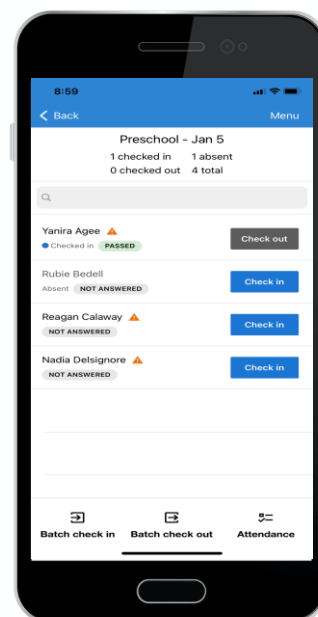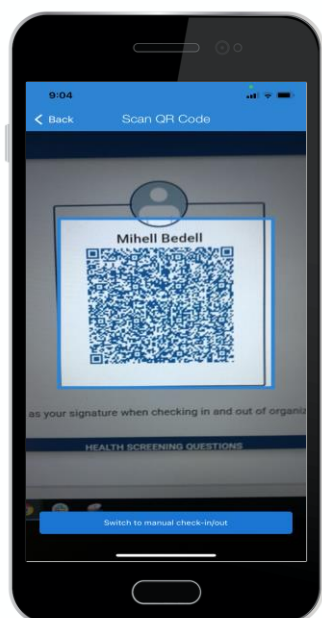
Select the member to check them in. If QR code is enable, a camera will open to scan the parent's unique code. This will act as their signature. If no QR code is available, select switch to manual check-in and you will be prompted to pick the name of the person checking them in from the pick-up list.

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.

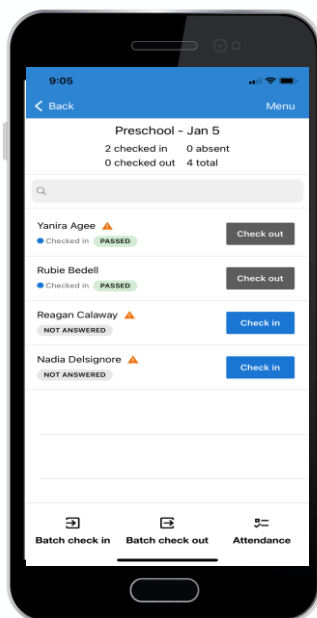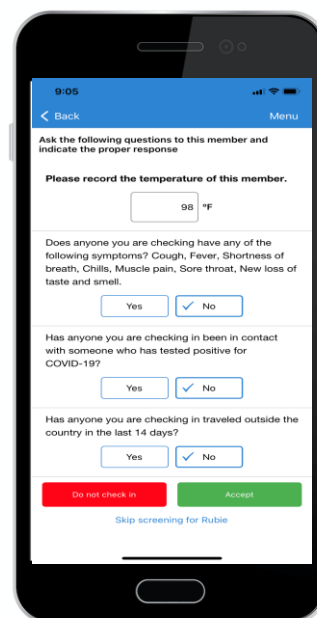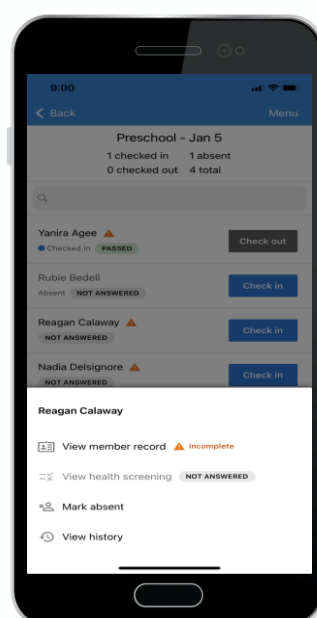From your check-in sheet, you will be able to quickly see who has passed or failed the health screening questions. To check-out members at the end of the day, select Check out and repeat the steps.

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.

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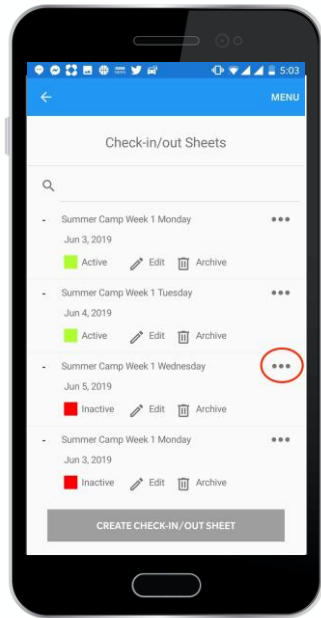
IMPORTANT: When you are finished with your check-in sheet at the end of the day, make sure to archive it.

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