

# Getting started with The1Form

Implementation guide for group managers

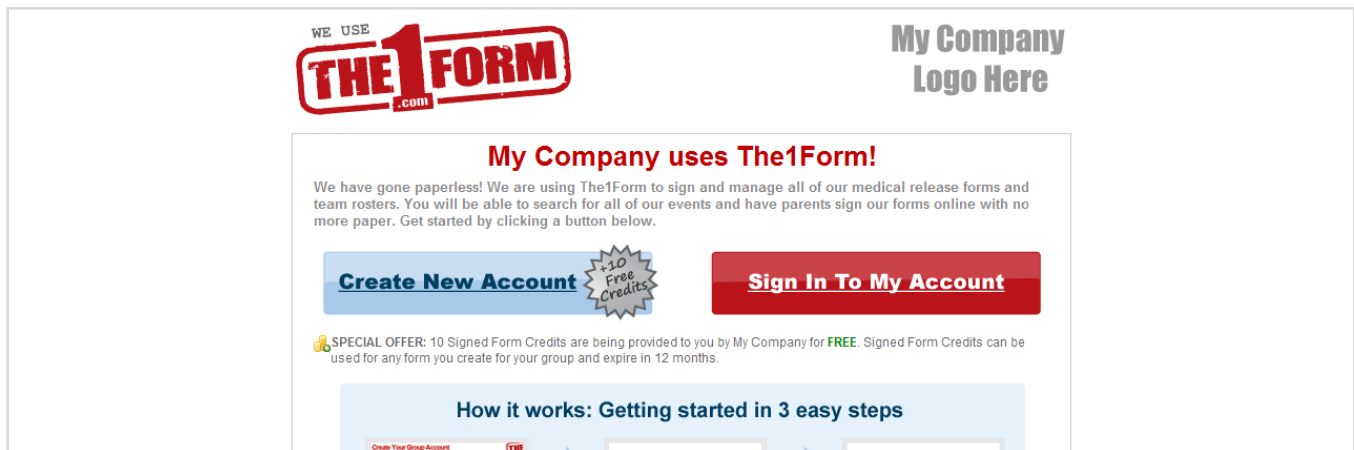


## Welcome to The1Form

The1Form is the easiest way to create, sign, and manage online paperless medical release forms for all youth-based organizations, sports events, leagues, gyms, teams, tournaments, camps, clinics, and more! Follow the instructions below to create your account with The1Form.

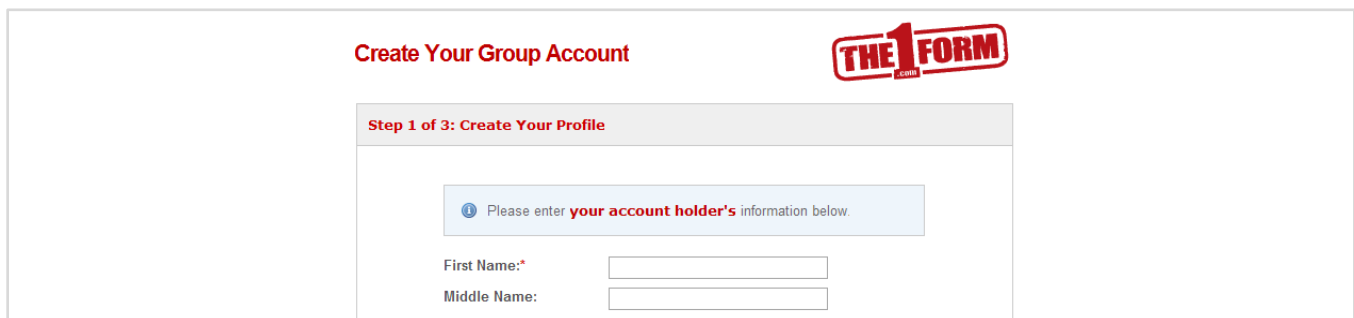
## Account Creation

### Starting from an event producer's custom page at The1Form



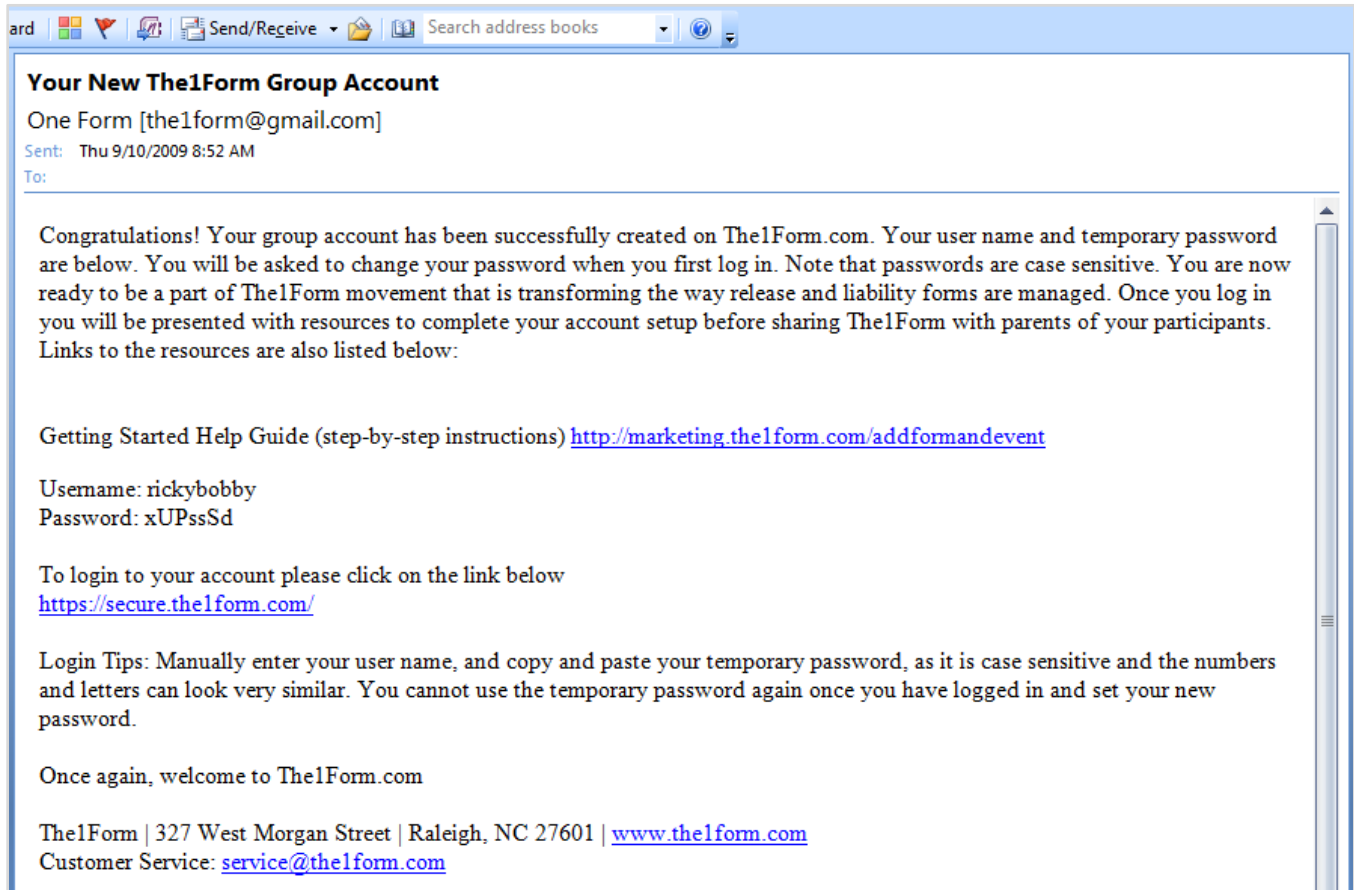
- Click "Create New Account" if you are new to The1Form
- Click "Sign In To My Account" if you already have an account created (If you already have an account, skip to "Sign in to your account")

## Create your group account



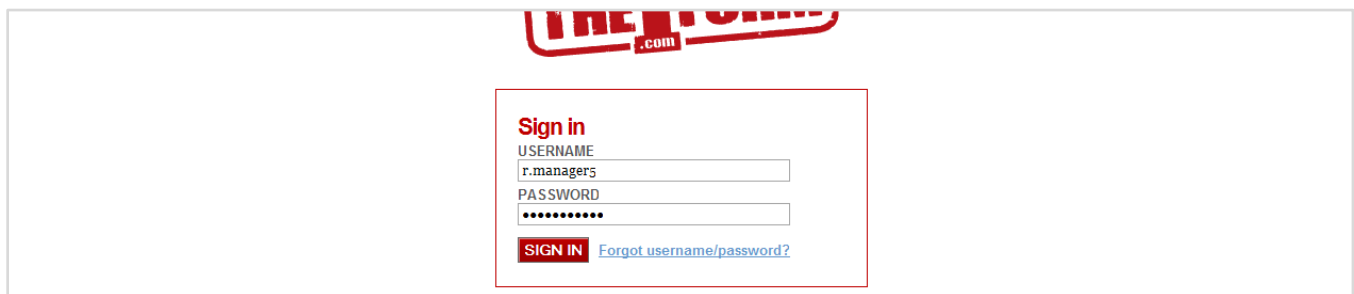
- Complete Steps 1 through 3 to create your group account

## Check the email account that you provided



- You will receive an email containing your user name and temporary password

## Sign in to your account



- Click on the link provided in your email to get to the sign in screen
- Login to your account using your user name and temporary password from your email
- You'll be prompted upon first sign in to change your password to something you can remember
- View the Getting Started Help Guide when you sign in for detailed instructions about completing your account set up.

# Getting started with The1Form

User guide for group managers



## **Step 1: Add Events**

Click Add New Event to select the events your group is attending. Add all the events you will be attending first, before inviting participants. Adding an event this way will automatically tie the event form to each participant's account, allowing their parents to sign the form.

1. Click the Attend link next to each event your group is attending
2. Click Add New Team to create a new team to attend this event
3. Complete the Add New Team form and click Save
4. You can create all of your teams from this page and select, or deselect which teams will attend the event
5. Click Save if you are finished, or Save & Add New Event to return to the event list
6. When done adding events, you'll be taken to your Events tab where all of your events will be listed
7. From this page, you can edit which teams will attend each event using the Teams link in the Action column

## **Step 2 (Optional): Create a medical release form for your group**

This step is completely OPTIONAL. If you are not using The1Form to host a medical release form specific to your group, skip this step, and move to step 3. If you are hosting your medical release form on The1Form, continue with this step.

1. Click Add New Form
2. To host your form on The1Form, you will need to purchase credits
3. Create a form one of two ways: Do-It-Yourself or let The1Form build it for you
  - a. Do-It-Yourself: This method is free and there is a Step by Step Guide instructing you how to create your form.
  - b. Let The1Form build it for you: This method is \$19.99 per form. You will name your form, give it a start date, and an expiration date, and then upload the form to the site, where The1Form staff will take over creating the form for you.

## **Step 3: Invite Parents to create accounts and sign required forms**

1. Click Invite Parents
2. You can invite parents one of two ways: Add Participants and Invite Parents via email invitation or Distribute Your Access Key
  - a. Email invitations allow the parent to sign up free of charge, and no credit or debit card information is necessary.
    - i. To invite parents via email, you bypass a \$1.00 verification fee because you, as the group manager, are verifying that the invitations are going to the parent's email and that they have the authority to sign the participant's form(s).
    - ii. You can add your participants one by one, or use our CSV template and upload all of your participants at once.
    - iii. After entering/uploading the participants, the system will send an invitation to all specified email addresses.

- iv. The parent will receive an invitation that contains a link to The1Form. To sign up, they click the link which ties their child to your group and enables you to view their signed form(s).
  - v. After inviting parents, a list of your participants will be displayed in your Participants tab. From here, you can view their vital health record, the teams they are on, and their form(s).
  - vi. If a participant's parent **has** accepted your invitation, but has not yet signed a form, they will have a red X by their name and the participant's name will be blue on your Participants tab. In this case, you do not need to re-invite them. The parent simply needs to log-in and sign the form(s). The parent will also be receiving email reminders from The1Form.
  - vii. If a parent **has not** accepted your invitation the participant's name and icon will be gray on your Participants tab and their name will still show up in your invitation manager page. When the parent accepts your invitation, the participant is removed from your invitation manager page.
- b. Distributing an Access Key will allow parents to create an account, and then enter an access key that will tie their child's forms to your group. This method requires the parent to enter their credit card information and a \$1.00 verification fee will be charged to the parent.
- i. To invite parents using this method, you can send an email out to parents containing your group's access key, or print the Easy Start Guide, which contains your group's access key, and distribute the paper to parents.

#### **Step 4: Add your participants to teams**

You may have already created teams during the Add Event process in Step 1. If not, you will need to Add New Teams as well.

1. If you still need to create a team, click Add New Team and enter the team information.
2. If you have already created all of your teams, click your Teams tab to add participants to your teams.
  - a. Your teams are listed on this page. From here, you can see the total number of participants, the number of forms that have been completed, and the number that are outstanding. Until the total number of participants equals the total number of completed forms, your team status will be a red X. Once these numbers equal, your team status will become a green check.
  - b. To view the participants on a team, click the team name. This shows a list of the participants, as well as which teams they are on, and allows you to view their forms.
  - c. To edit the team information, click Edit Team Info in the Actions column. Here, you can change the name, description, number of participants, etc. for the team.
  - d. To add/remove participants from the team click Edit Team Roster in the Actions column. This view shows the Current team roster, and the participants who are available to be added to the team roster. Check/uncheck those that you would like to add/remove from the team roster.