



Simtrak™ Mobility

A decade-long background in professional and amateur sport medical data collection, analysis, and reporting.

MAINTAIN > Paperwork/Insurance the Simtrak™ Help Guide series

When you start up Simtrak™ Mobility, and after you log in to the system, the first thing you will use on the initial screen is the Main Menu, at the top of your screen, and shown in this next illustration:

File Edit Record Maintain Transactions Reports Utilities ISS Window Help

When you want to enter or view insurance information for an athlete, or enter or track the status of required paperwork, click on Maintain on the Main Menu (fourth item from left) and then choose Paperwork/Insurance from the selections that appear under the word Maintain (click on Paperwork/Insurance after clicking Maintain). The Maintain Paperwork/Insurance window then opens, as shown below. At the top left are fields to track paperwork. The rest of the screen has fields for primary and secondary insurance information.

Paperwork

Parental Consent Form

Insurance Form

Physical

Needs Paperwork

Date

[[]

[[]

[[]

[[]

Create [] [[] []

Modify [] [[] []

Description: [] Fed ID #: [] Exp. Date: [[]

Group # / Policy #: []

Company: []

Contact: []

Address 1 & 2: []

City, State Zip: [] [] []

Province / Country: [] []

Phone 1 & 2: () - [] () - []

Fax / E-Mail: () - [] []

Description: [] Fed ID #: [] Exp. Date: [[]

Group # / Policy #: []

Company: []

Contact: []

Address 1 & 2: []

City, State Zip: [] [] []

Province / Country: [] []

Phone 1 & 2: () - [] () - []

Fax / E-Mail: () - [] []

Entering Insurance Information

While looking at the Paperwork/Insurance screen, click on the binoculars on the Toolbar to see a list of players from which to select one. Select your player, and then click on the Open Record icon on the Toolbar (manila folder towards the left on the Toolbar). The insurance fields will now be opened (white and lighted) and ready for you to enter information.

Enter your athlete's insurance data. When you have completed your entries, save the new data by clicking on the Save Changes (computer disk) icon on the Toolbar.

About Paperwork Status Boxes

At the top left of the Paperwork/Insurance screen are several Paperwork boxes, with date fields to their right. You can set up any paperwork name you want in the prompts, and you can have up to five of them (paperwork items you want to track). For each paperwork item, you can enter a date that the paperwork was complied with, completed, or submitted. That date will show up in the date field to the right of each paperwork prompt name.

When a paperwork item is complied with or received for an athlete, you can place a checkmark in the box, indicating completion of that requirement.

Set Up Paperwork Status Boxes

In order to set up the Paperwork fields (up to five of them), you will need to log in to Simtrak™ Mobility using 0000 and MASTER (or other security that you may have set up to replace this default log in code). That means you should log out if you are currently using Simtrak™ Mobility, and then log back in with 0000 and MASTER.

Then you will select Maintain on the Main Menu, and then choose Organization Setup in the drop down list that appears. The Organization Setup screen is then displayed (shown below). Make sure the Organization tab is selected, not the Settings or Defaults tab.

Organization Setup [Mode: Wait]

Organization Settings Defaults

Number:

Name:

Address1:

Address2:

City, State Zip:

Province: Country:

Phone: () - Fax: () -

Maximum Security Levels

Add:

Edit:

Delete:

Print:

Utilities:

Use Amateur Fields

Use Professional Fields

Paperwork Field 1:

Paperwork Field 2:

Paperwork Field 3:

Paperwork Field 4:

Paperwork Field 5:

Now select your organization (if your organization is not displayed already) by clicking on the binoculars on the Toolbar and choosing (double clicking) the organization from the list that is presented.

With the organization selected, click on the manila folder icon on the Toolbar, the Open Record (Edit) icon. Now, your fields on the Organization Setup screen will be white and lighted (open for data entry or edit).

In the lower right hand portion of the display, you see five fields where you can enter the name of up to five paperwork items you want to track. Only the fields you type into will show up later on as you use Simtrak™ Mobility, and you can use none, one, two, three, four, or five of them, whatever you like.

Type in the names of the paperwork you want to track. Then save the additions or changes you have made with the Save Changes (computer disk) icon on the Toolbar. Then exit the software by clicking on the open door, the Close Form (Exit) icon, on the Toolbar several times until you exit the software.

Using Paperwork Status Boxes

Log in to Simtrak™ Mobility under your user name if you are not there already. Select Maintain on the Main Menu and then Paperwork/Insurance under it.

Click on the binoculars on the Toolbar, and then select an athlete from the list that now shows on your computer. Next open the fields for that athlete by clicking on the open manila folder icon on the Toolbar. The fields are now white background and lighted.

When an athlete turns in the referenced paperwork or otherwise complies with the paperwork being tracked, enter a checkmark in the check box for that paperwork item. See the illustration below.

| Paperwork | Date |
|---|------------|
| <input checked="" type="checkbox"/> Parental Consent Form | 07/02/2007 |
| <input checked="" type="checkbox"/> Insurance Form | 07/02/2007 |
| <input checked="" type="checkbox"/> Physical | 07/01/2007 |
| <input type="checkbox"/> Needs Paperwork | / / |

Also, enter the date of the compliance with or completion of the paperwork item. You will need the date later on for special reports you can produce from this data (if you do not enter the date information, these reports will be unavailable to you).

Printing a Paperwork Status Report

On the Main Menu, select Reports and then Paperwork Status. Now you will see the information fields shown below.

| Paperwork | Status |
|-----------------------|--|
| Parental Consent Form | <input type="checkbox"/> Not on File Prior to Date: <input type="text" value="//"/> |
| Insurance Form | <input type="checkbox"/> Not on File Prior to Date: <input type="text" value="//"/> |
| Physical | <input type="checkbox"/> Not on File Prior to Date: <input type="text" value="//"/> |
| Needs Paperwork | <input type="checkbox"/> Not on File Prior to Date: <input type="text" value="//"/> |

You can produce reports that show those athletes who need paperwork (are not compliant with your paperwork items).

To get that report, make a selection of Personnel Type or Sport, or leave those two fields blank in order to run the report for all athletes. Check the Not on File box or boxes for the items for which you want to run the report. Then click on the Print or Print Preview icons on the Toolbar, located towards the right hand side of the Toolbar. You will see a list of athletes for whom the paperwork is not submitted or completed ... the athletes who still need paperwork (the athletes without the paperwork item checked in their personnel record). Such a report is illustrated immediately below.

Date 09/23/2007

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Sport

Paperwork Status Report

| Last Name | First Name | Paperwork | Date |
|------------|------------|-------------------------------------|------|
| Solitonina | Bill | Parental Consent Form - Not on File | |
| Terry | Wilson | Parental Consent Form - Not on File | |

***** End of Report *****

If an athlete's name does not show up on the report, that means the software "saw" a check mark in the personnel record for that paperwork item, meaning it has been completed by that athlete, and no attention is needed for that athlete's paperwork processing.

If you have athletes who already have submitted a paperwork item, such as completed a physical, but who need to have that paperwork renewed, updated, or resubmitted for a new year, semester, or sport, then you will need to create a report by using the date field in the Paperwork Status Report window, illustrated on prior page.

By entering a date (a cutoff date) for a particular paperwork item in the Paperwork Status Report screen, and then selecting Print or Print Preview on the Toolbar, you will produce a report for all athletes whose date of last paperwork compliance is prior to the cutoff date you entered for making your report. For example, if you enter a cutoff date of August 1 for your paperwork report for the physicals paperwork item, then the report will show all whose prior physical date was before August 1 (or, if it helps your way of thinking, whose physical has “expired” as of August 1). So, if you need new physicals beginning August 1, this report will show you who needs an updated physical, or other such out-of-date paperwork item. Below is such a report showing the dates of all those paperwork items complied with before a certain cutoff date (in other words, whose paperwork is old, and therefore not current as of the new requirement date).

Date 09/23/2007
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Sport

Paperwork Status Report

| Last Name | First Name | Paperwork | Date |
|------------|------------|---------------------------------------|------------|
| Doe | John | Parental Consent Form - Prior to Date | 07/02/2007 |
| Solitonina | Bill | Parental Consent Form - Prior to Date | 06/12/2007 |
| Terry | Wilson | Parental Consent Form - Prior to Date | 02/21/2007 |

**** End of Report ****

Additional Report Available By Request

For users who need to print out insurance information by athlete, we offer a special custom report we can send to you for your software installation. It will print out personnel, relative, and insurance information.

When the custom report is installed, you get that report by selecting Reports from the Main Menu, then Personnel/Address List, then Personnel Address. This custom report replaces the default report that shows personnel and contact information.