DOCNETWORK

NEW PROVIDER

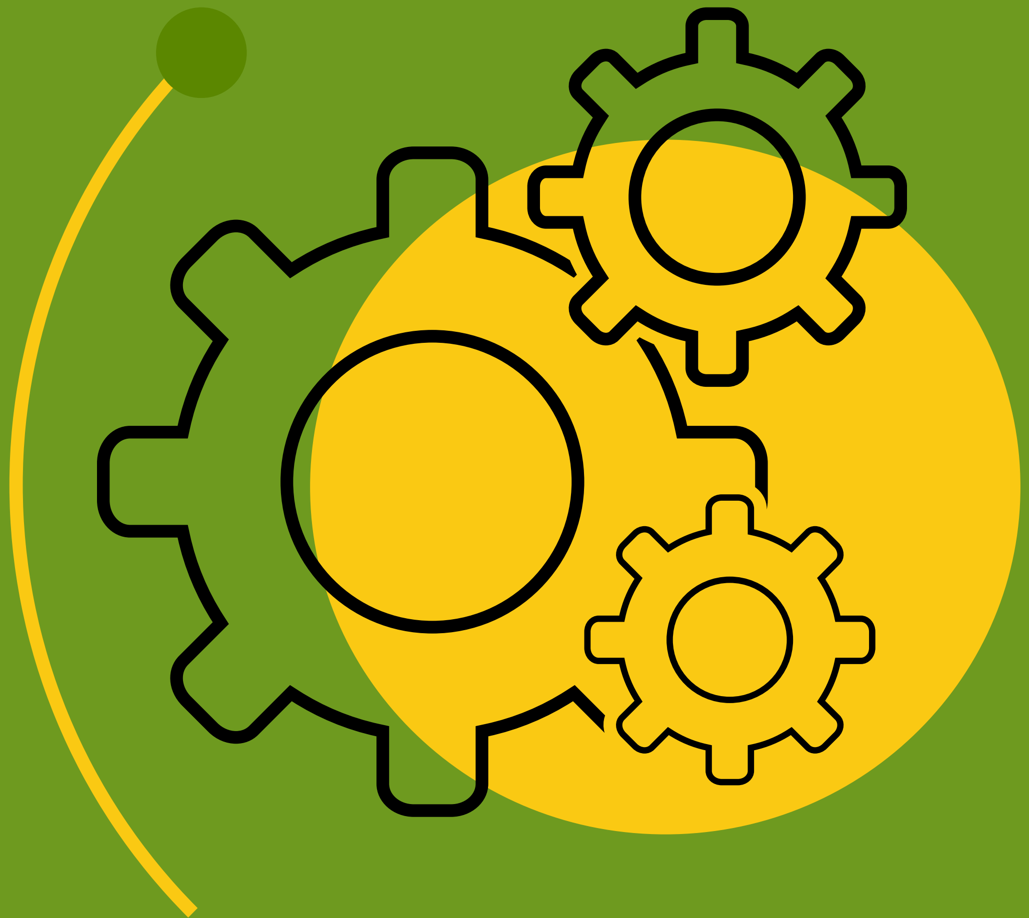
Toolkit

WELCOME!

Welcome to the **DocNetwork New Provider Educational Tookit**! This serves as **reference guide** designed for providers new to our application.

Throughout this interactive document, you'll find handy hyperlinks to accessible training resources.

learn the ins and out of the app
connect with our community of learners
discover the full capabilities of the app



Use this toolkit to:

1. Identify and locate main features of the app.
2. Summarize the capabilities and functionalities of the CampDoc / SchoolDoc app features.
3. Select and use app features that meet specific organizational priorities.

How to use this tookit

Throughout this interactive document, you'll find handy hyperlinks to accessible training resources, including step-by-step articles, how-to videos, infographics, and on-demand online courses for you to review at your leisure.

Before you jump in, take a moment to familiarize yourself with the layout of this tookit and how to navigate it:

This toolkit is divided into modules. Each module includes the following:

- Learning Goals
- Written Content
- Links to Resources

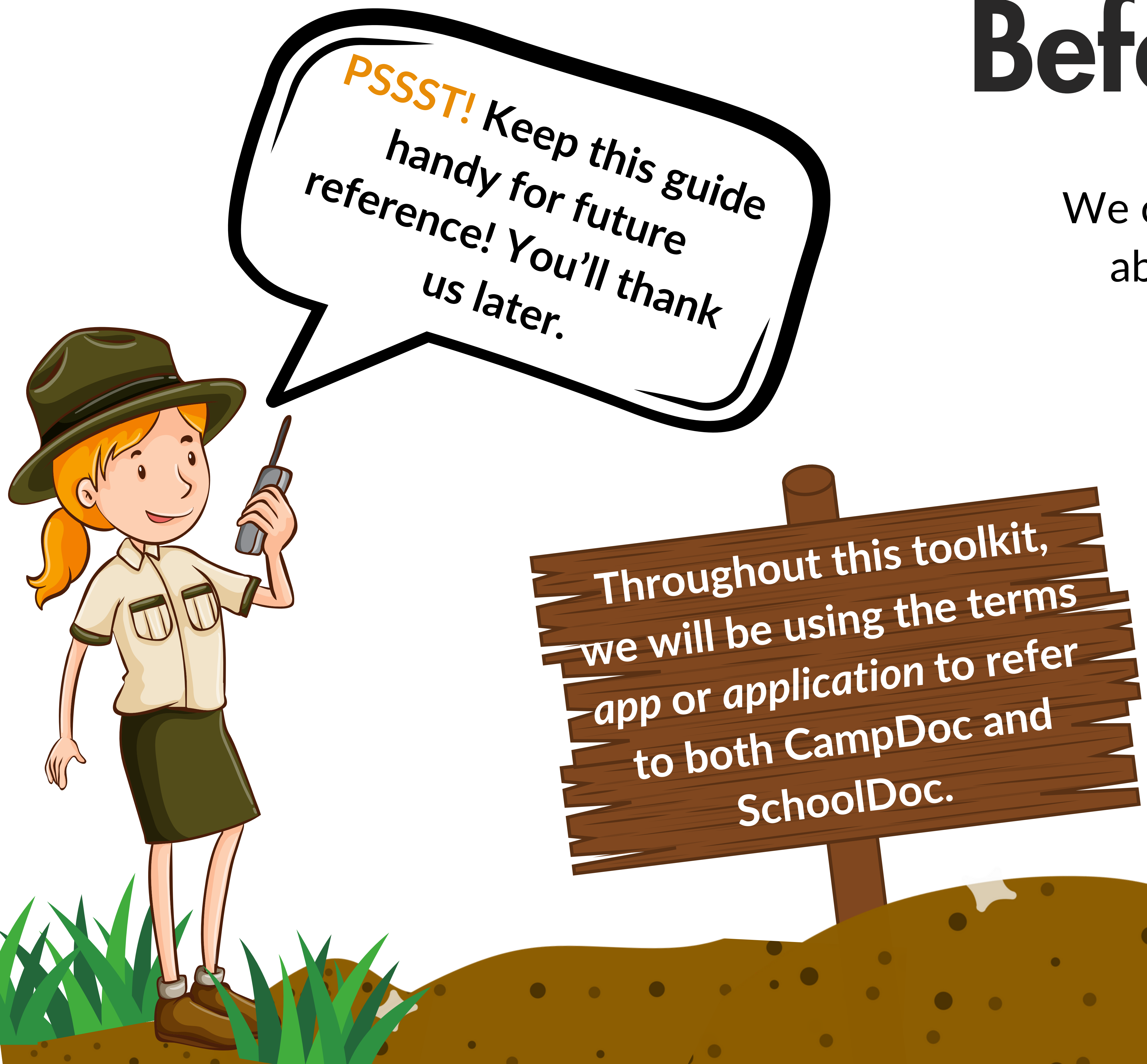
Click on the topics in green for instant access to relevant resources on each feature!

KEY

- Helpful Hints
- Learning Goals
- DocNetwork University

You don't have to use this toolkit in order! Jump around and check out the topics most relevant to you!

Before you begin...



We often use specialized language when talking about the app, some of which may already be familiar to you, and some of which may be be new. We have included this handy **Glossary of Terms** for you to use as a reference as you go through these training materials and while using the application. Check it out at your leisure!

Table of Contents

Launch Process & Onboarding

LET'S LEARN

- Explain the launch process timeline for your organization
- Compile required session information to complete your organization Group Structure
- Set up and customize your organization's CampDoc/SchoolDoc account
- Differentiate between Group Imports and Profile Imports

This module is largely relevant for new organizations.

For new organizations, your Account Executive will walk you through this process!

DOCNETWORK

Launch Process

- Your **Client Success Team** will work with you to through each step of the launch process to successfully launch your account.
- It typically take **4-6 weeks** from the date your submission is reviewed and confirmed by your Client Success Team for your account to launch.
- Check out the
  - Launch Process Support Article
  - Launch Process Overview Video

  to learn more about each step of the process.

Onboarding

The Onboarding Support Article offers a step-by-step guide on how to set up your account for your upcoming programs, with instructions for both **NEW** and **RETURNING** organizations.

It also outlines the difference between organizations that use our app for Electronic Health Record (**EHR**) only and those that use the **Registration** feature.

Check out our online course:
Introduction to Onboarding
Enroll for free today!

Launch Checklist

1 Submission

Submit forms and Session Information under the **Setup** tab. Watch our Preparing for Submission videos Part 1 & 2 for an overview of the submission process for ***new*** and ***returning*** organizations.

2 Account Updates

While your Client Success Team is reviewing and your submission details, access and begin customizing your account. If using us for registration, set up your ACH info. If not, use this time to prepare your first import and send it to your Client Success Team to review!

3 Build & Review Health & Registration Forms

Once your Health and/or Registration Forms are built out in your account, access your **test account** and review the forms from the ***participant's*** POV. Submit any edit requests to your Client Success Team. **Note**: You may have multiple profiles to review if you have multiple versions of your health forms.

4 Finalize & Launch

In this final stretch, your Client Success Team will complete one final review of your account. If not using registration, your team will work with you to finalize your first profile (participant) import. After your final review gets the green light, you'll sign the **Launch Authorization** and your account will be good to go!

Group Structure

Group Structure is a ***key*** aspect of the CampDoc/SchoolDoc app. It is the basis for many important features, including running reports and determining which participants see which forms.

Check out these resources for more information:

Group Structure Support Article

Group Structure Video Playlist

Here is what you need to know:

- It's the **hierarchy** in which sessions and programs are organized in your account.
- It's the **foundation** of your account, so you must consider and communicate your organization's needs to your Client Success Team as early as possible.
- Group Structure impacts **3 key areas** of the app:
  1. **Participant Forms**
  2. **Reports**
  3. **Provider Access**

Let's Talk Customization

Remember Step #2 - **Account Updates** - in the Launch Checklist? This is when your Client Success Team is reviewing and confirming your submission details. This is a ***great*** time to access and begin customizing your account! Let's look at some ways that you can do this:

Notifications

You can customize the type of emails, text, and frequency of the automatic notifications sent by your organization. More information in our Notifications Support Article and Notifications Video Playlist.

Branding

You can customize the look of your account to align with your organization's branding. Check out our Branding Support Article and Branding Video Playlist to learn how to customize the **Login** page, the **Participant Portal**, and the **Registration** process.

Registration Custom Text

If your organization is using our online registration system, you can go into **Registration Setup** to customize text in the **Add-On Select**, **Coupon Entry**, and **Payment** steps of your participants' registration process. To learn more, check out our Registration Custom Text Video and Support Article.

View our Customizable Features infographic for all the features you can customize!

Group Imports

Group Imports are the imports of your Group Structure. These imports are done by your Client Success Team. For more information, check out the Group Imports Support Site Article.

Profile Imports

Profile Imports are for organizations that do ***not*** use CampDoc/SchoolDoc for registration. The resources below explain how to import participants who have been registered using a different platform:

- Profile Imports Support Article
- Profile Imports Video Playlist

If you prefer to process your own imports, we offer a Self-Service Importer Tool that is accessible via the Provider Portal.

Imports

If you don't currently use our registration feature, check out our Registration Module in this toolkit to discover all we have to offer!

Not using us for registration? We'll need you to import your roster of participant profiles via an import template.
Don't worry, your Client Success Team will walk you through the first import each season to ensure it goes smoothly.

Medical Features

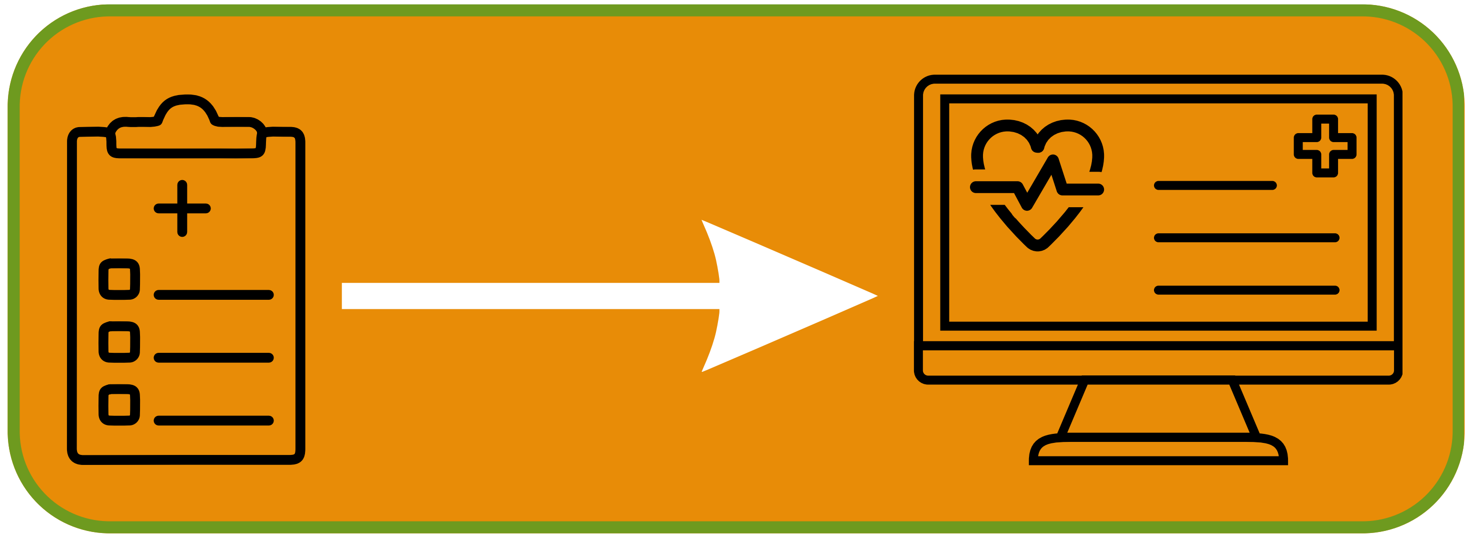
LET'S LEARN

- Identify and locate the medical features in your CampDoc/SchoolDoc account.
- Summarize the capabilities and functionalities of the Health Log, Electronic Medication Administration Record (eMAR), and Pescreening tools.

Health Log

The **Health Log** is our bread & butter. This feature allows you to log health and injury related incidents electronically in a centralized and secure environment that is flexible and easy-to-use.

Bye bye paper logs and hello efficiency!



- It's meant to make logging clinic visits more efficient and useful while helping your organization meet ACA accreditation standards.
- It's tamper-proof, so entries can't be deleted, and they can't be altered by anyone other than the provider who originally entered them.
- You can store entries, triage visits, record OTC med administration, create templates for common occurrences, generate stats, and more!
- The Health Log Support Article offers a comprehensive overview and step-by-step guide on how to use the Health Log. Check out the Health Log Video Playlist for brief tutorial videos on how to perform various functions in the Health Log.

eMAR

Following the standards for safe medication practices, the **eMAR** allows you to chart the date and time that medications are administered, track medication quantities, filter for medications, and export eMAR history and medication records.

For more information, check out the following resources:

- eMAR Video Playlist
- Medications Quantity Tracking Video
- Medications and eMAR Support Site Article

Want to learn more? Check out our self-paced online courses:

- Introduction to the Health Log
- Introduction to the eMAR

Enroll for free today!

Prescreening

The **Prescreener** is a customizable feature that allows your organization to prescreen their employees and participants for symptoms of contagious diseases (e.g. COVID-19) to maintain a healthy and safe environment for everyone across the organization

Check out the Prescreening Support Site Article for more information on how to use this feature.

List Builder & Reports

LET'S LEARN

- Use conditions to modify the List Builder and filter profiles.
- Differentiate between the different types of reports and best use cases for each.
- Explain the benefit and use case of downtime reports.

DOCNETWORK

List Builder

List Builder is a powerful tool that allows you to filter your Profile List to a subset of profiles that match specific criteria. This is an important first step before creating a report, sending a bulk message to your participants, or assigning Roles to your team.

The resources below explain in detail how to use this tool:

- List Builder Support Site Article
- List Builder Video Playlist

Reports

Here is what you need to know:

- All reports are generated solely for the profiles that you filter for in the List Builder.
- You can generate **Standard**, **Custom**, and **Summary** reports. Turn to the next page for more info on each of these types!
- If there's a report that you use frequently, you can save the report settings as **Templates**. You can also share your Report Templates with other providers at your organization.

Report Types

Standard Reports

Standard reports are created using **existing templates**. Common types include *All Profiles*, *All Allergies*, *Completion Summary*, *Account Balances*, and *All Medications*.

Custom Reports

Custom reports are those you **create** based on questions and steps in your health forms. You'll also have the option to add **Advanced Options** such as *Expired Answers* and *Past Profiles*.

Summary Reports

Summary reports include only **yes** and **no** answers from the health forms. You'll also have the option to include details for each question.

Reports Resources

For more information on the types of reports and how to run them, please check out the resources below:

- Reports Support Site Article
- Reports Overview Video Playlist
- Standard Reports Video Playlist
- Custom Reports Video Playlist
- Advanced Options Video

Want to learn more about reporting? Check out our online course:

- Introduction to Reporting

Enroll for free today!

Downtime Reports

As part of an organization's planning, we recommend downloading or printing a complete Health Profile report, or **Downtime Report**, in the event of a power outage or loss of internet. The resources below explain how to generate this type of report:

- Preparing for Downtime Support Site Article
- Downtime Reports Video

Tools

LET'S LEARN

- Use Power Tools to make bulk changes to profiles.
- Communicate with participants and staff via text or email.
- Explain the functionality and applicability of Tags.
- Use the Attendance feature to check participants in/out and track attendance at specific programs or classes.

DCNETWORK

Messaging

- The **Messaging** feature along with the List Builder allows you to send messages to select groups of participants and/or providers.
- We recommend using email to communicate with participants, but texts are also available as a way to send emergency communications.
- Please see the resources below for more information on how to use this tool:
  - Send Messages Support Site Article
  - Send Message Video Playlist

Power Tools

Power Tools allow you to update profiles in bulk based on the list of participants created in the List Builder. You can review multiple profiles, update tags, assign and revoke provider roles, and create bulk health log entries.

Check out the following resources to learn how to use these functions in more detail:

- Power Tools Support Site Article
- Power Tools Video Playlist

Tags

Tags are a *highly* useful and often underutilized feature.

Think of Tags as miscellaneous pieces of data that can be attached to profiles and used for filtering and reports. They can be useful for tracking data you need that isn't tracked in your registrations or health forms.

For more information on how to set up and use Tags, check out the following resources:

- Tags Support Site Article
- How to Customize Tags Video

Attendance

The **Attendance** feature includes real-time check-in and check-out functionality, attendance-tracking for specific programs or classes, and auditing capabilities to keep your check-in and attendance records accurate.

The resources below explain how to use this time-saving tool:

- Attendance Support Site Article
- Attendance Video Playlist

Registration Setup

This module is for organizations that use CampDoc/SchoolDoc for registration.

If you don't currently use our registration feature, we encourage you to check out these resources to discover all we have to offer!

LET'S LEARN

- Set up and customize session information in Registration Setup.
- Adjust enrollment settings for current & upcoming sessions.
- Enter customized text to be displaying during registration process.
- Create, edit, and deactivate Add-ons and Coupons.

DOCNETWORK

Registration Setup

Before you open up registration for your participants, you want to first set up your account and customize your session information.

This means finalizing **enrollment dates**, setting **capacity limits**, creating **add-ons** and **coupons**, and more.

For an introduction of the Registration Setup feature, watch our Registration Setup Overview Video.

REGISTER NOW

Custom Text

The **Custom Text** tab of each session allows you to enter customized text that will appear just for that individual session during the **Add-On**, **Coupon**, and **Payment** steps of your participants’ registration process.

For more information on how to set up your custom text, check out the resources below:

- Registration Custom Text Video
- Registration Custom Text Support Site Article

Enrollment Settings

The **Enrollment Settings Support Site Article** lists and describes all the adjustable enrollment settings for your current and upcoming sessions.

We recommend reviewing the article and watching the respective videos below to learn about the options and how to use them:

- Tuition Fees & Deposits Video
- General Ledger Code Video
- Capacity & Waitlist Video Playlist
- Age Restrictions Video Playlist
- Enrollment Dates Video Playlist
- Registration Filter Video Playlist

Here's a quick breakdown:

- **Enrollment Dates** - exact dates and times that registration opens and closes
- **Tuition** - total cost associated with a session
- **Deposit** - portion of total tuition that participant is required to pay at time of registration
- **Capacity** - max. # of people who can register for a session
- **Waitlist** - enable a waitlist if the capacity of session is met
- **Age Restrictions** - age limits set for a session
- **Registration Filters** - customizable filters directed participant to specific sessions for which they're eligible (e.g. grade level)

Coupons

Coupons are discounts or credits offered by your organization and are only applied to tuition fees. Examples of common coupons include early bird coupons, sibling coupons, and scholarships.

Review the list of customizable options before creating a new coupon (do this for add-on options, too)! You can limit the capacity, add an expiration date, and more.

For more information on how to set up your coupons, check out these resources:

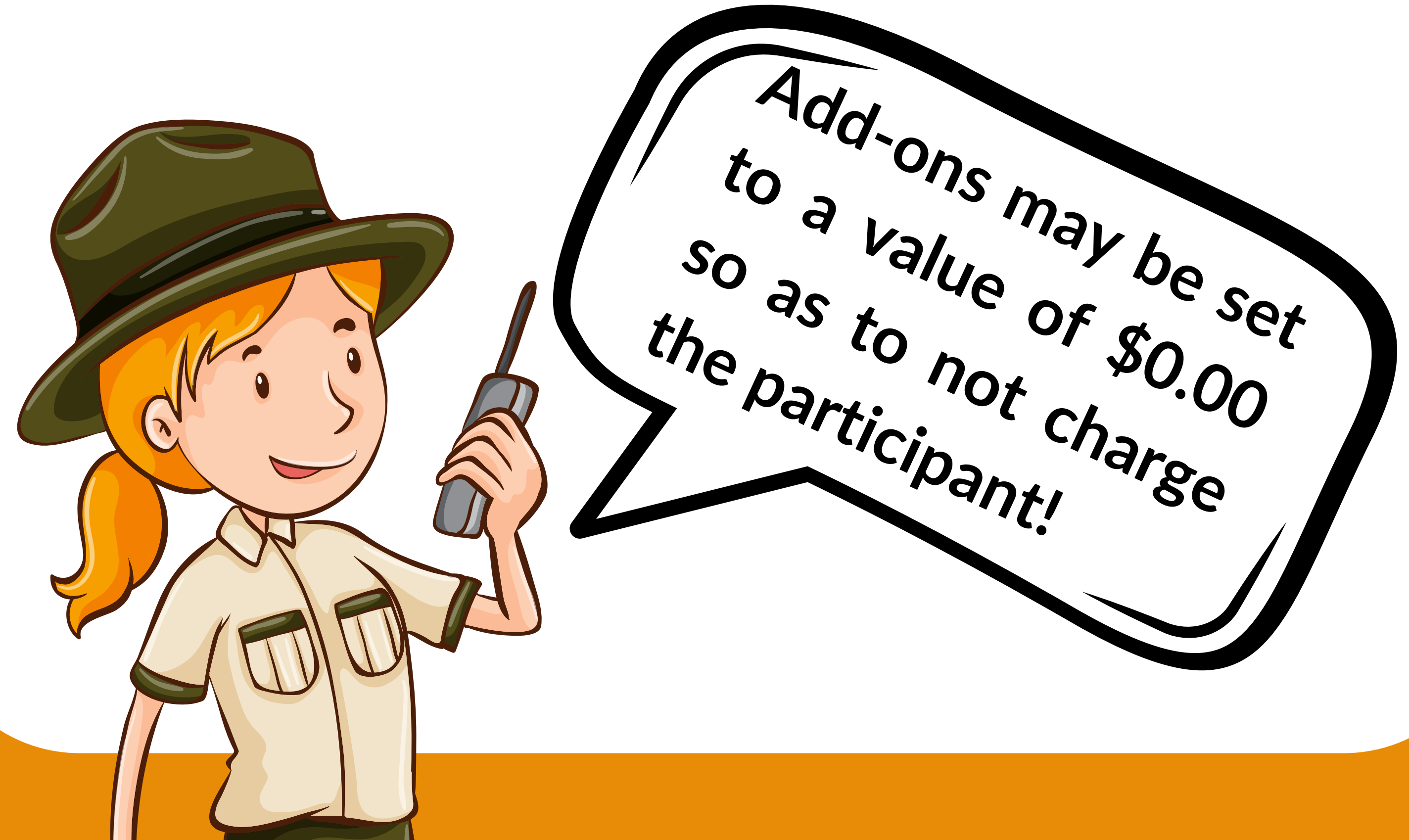
- Coupons Support Site Article
- Coupons How-to Video

Add-Ons

Add-ons are additional items or services that can be added to a participant's registration. Examples of common add-ons include apparel (t-shirts!), bus transportation, and store credit.

For more information on how to set up add-ons, check out the resources below

- Add-ons Video Playlist
- Add-ons Support Site Article



Finances

LET'S LEARN

- Differentiate between Participant and Organization Ledgers.
- Explain the functionality and applicability of General Ledger Codes.
- Read a participant's Account tab and make necessary adustments.

This module is for organizations that use CampDoc/SchoolDoc for registration.

If you don't currently use our registration feature, we encourage you to check out these resources to discover all we have to offer!

DOCNETWORK

Let's Talk Finances

Unless you're in accounting, we understand that finances can be daunting. But fear not! We're here to help. Let's start with an overview:

Within the Finances feature, you are able to

- view transactions
- edit payment methods
- view payouts
- process refunds
- and more!

PAYOUTS

We all want to get paid, right? Here's what you need to do first:

Add your organization's **bank account information** in the app by going to

Organization Ledger > Payouts > Add Payment Method

Once added, a daily payout will be initiated if the balance is over $500.00.

LEDGERS

In Finances, you'll see two ledgers - **Participant Ledger** and **Organization Ledger**.

Both ledgers contain historical data - they show the history of your account if your organization has used our app for more than one season.

Participant Ledger

Participant Ledger displays the finances exchanged *between your participants and your organization*.

This includes all credit and debit transactions, such as program tuition payments, add-on purchases, coupons, refunds, adjustments, and more.

Check out our Participant Ledger Video Playlist to learn about how to navigate the Participant Ledger.

Organization Ledger

Organization Ledger displays the finances exchanged *between your organization and CampDoc/SchoolDoc*.

This includes all credit and debit transactions, such as payments, payouts, refunds, chargebacks, and ACH-returns.

Check out our Organization Ledger Video Playlist to learn about how to navigate the Organization Ledger.

Okay, so what's the difference?

General Ledger Codes (GL codes) are a great way to help your organization designate funds to specific groups or locations.

GL codes give your organization the ability to **allocate funds** to the appropriate programs and isolate revenue by code in financial reports

Set up general ledger codes during the **submission** process or during your **registration setup**, ***before*** registration opens for your programs.

For more information, check out the resources below:

- General Ledger Codes Video Playlist
- General Ledger Codes Support Site Article

General Ledger Codes

Participant Account

In the **Accounts** tab of a participant's profile, you can:

- process payments and refunds
- set up and deactivate payment plans
- void transactions
- and more!

To learn more, check out the resources below:

- Participant Account Tab Video
- Participant Account Support Site Article

DOCNETWORK

THANK YOU!

Be sure to visit our Support Site for new and updated resources and learning opportunties!