



WIAA+FINALFORMS PLAYBOOK

SECTION 1: FAQ

CONFIRMATION EMAIL

Q: I have my 'Account Confirmation Email'. What should I do?

- 1) Click the 'click here to confirm your account' link
- 2) Enter and confirm your password
- 3) Login to: Manage Your Profile, Verify Key Information, Verify Key Personnel, Manage Coaches/Certifications

NO CONFIRMATION EMAIL?

Q: I have not received my 'Account Confirmation Email'. What should I do?

- 1) Go to <https://wiaa.finalforms.com/>
- 2) Click LOGIN under the 'School/District Staff' icon
- 3) Search for your school district or your private school.
- 4) Click Login under "Staff" on your district's installation page.
- 5) Click "Never logged in?"
- 6) Enter your email address and click SUBMIT
 - a) If you get an error message stating the email address does not exist, try again to confirm you typed the email address correctly, then click SUBMIT.
 - b) If the error message persists, click "forgot your email?" to see if you can find your account under a different email address. **Or contact jkesterson@wiaa.com to update your email address.**
- 7) Upon a successful SUBMIT (or update by support staff), check your email for an 'Account Confirmation Instructions' email. Click the link, enter your password then access your account.

FORGOT PASSWORD?

Q: I know my email, but I forgot my password and need to reset it. What should I do?

- 1) Go to <https://wiaa.finalforms.com/>
- 2) Click LOGIN under the 'School/District Staff' icon
- 3) Search for your school district or your private school.
- 4) Click Login under "Staff" on your district's installation page.
- 5) Click "Forgot your password?"
- 6) Enter your email address and click "Send Secure Link"
- 7) Check your inbox for a 'Forgot Password' email. Follow password reset instructions.

NEW ATHLETIC DIRECTOR?

Q: I'm a new AD or at a new school. What should I do?

- 1) Contact another administrator in your school or district to have them create an account for you.
- 2) If no such administrator exists, **contact jkesterson@wiaa.com to get added.**

CONTACT SUPPORT

Q: I've tried everything. How do I get help?

- 1) Click 'Get Help' in the bottom right of your FinalForms installation or click <https://search.finalforms.com/documentation/support>



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SECTION 2: MANAGEMENT

- 1. MANAGE YOUR PROFILE** *(2 minutes)*
 - 1a. Edit Your Profile

- 2. VERIFY KEY INFORMATION** *(10 minutes)*
 - 2a. Watch the “Rollover Guide Overview”
 - 2b. Verify Core School Data
 - 2c. Verify Sport Information

- 3. VERIFY KEY PERSONNEL** *(2 minutes)*
 - 3a. Verify 2023-24 Key Personnel

- 4. MANAGE COACHES AND CERTIFICATIONS** *(15 minutes)*
 - 4a. Manage Coaches
 - 4b. Manage Certifications
 - 4c. Manage Forms
 - 4d. Archiving Coaches

- 4. UPLOAD AND MANAGE ROSTERS** *(15 minutes)*
 - 4a. Upload Rosters
 - 4b. Assign Students to a Sport
 - 4c. Assign Teams
 - 4d. Edit Student Roster Information



1. MANAGE YOUR PROFILE

1a. Edit Your Profile

(2 minutes)

1. Click your name (upper right corner)
2. Click the “**Edit Profile**” button.
 - a. Review information to ensure it is accurate. If not, modify any field.
 - b. Once you have verified or modified information, locate and click “**Update Staff**”.

2. VERIFY KEY INFORMATION

2a. Watch the “Rollover Guide Overview”

(2 minutes)

1. Watch the video.
2. Sign the step.

2b. Verify Core School Data

1. Click “**Edit**” in each school’s row
2. Review information to ensure it is accurate. If not, modify any field.
3. Once you have verified or modified information, click “**Update**”.
4. Sign the step.

2c. Verify Sport Information

1. Review information for the 2022-2023 school year to ensure it is accurate.

Follow steps a, b, and c.

a. Verify your Sport offering.

- i. Click “**Trash Can**” to remove a sport no longer offered.
- ii. Click “**+ Add**” on any other additional sports that you wish to add.

b. Verify Team and Coach options for each Sport.

- i. Click “**Edit**” to review information for any Sport.

1. Managing Teams

- a. Scroll to the Manage Teams (Varsity, JV, A, B, Green, Blue, etc.) area to ensure your offering is accurate. Click “**Remove**” or “**+ Add Team**” to reflect your offering.

2. Managing Coaches

- a. Scroll to the Manage Coaches area to ensure your personnel is accurate. Click “**Remove**” or “**+ Add Coach**” to reflect your personnel.
- b. You may also click “**Edit**” to update any Coach’s Position/Title, Experience, or Record information.

- ii. Once you have verified or modified information, click “**Update Sport**”.



IMPORTANT: Management can be done from the **Manage > Sports** page as well.
If mass updates of Sports are necessary, you may use the **Import** functions on that page.

2d. Verify Activities

1. Review information for the 2023-2024 school year to ensure it is accurate.

Follow steps a, b, and c.

- a. **Verify your Activity offering.**

- i. Click **“Trash Can”** to remove an activity no longer offered.
- ii. Click **“+ Add”** on any other additional activities that you wish to add.

- b. **Verify Team and Coach options for each Activity.**

- i. Click **“Edit”** to review information for any Activity.
 1. **Managing Teams**
 - a. Scroll to the Manage Teams (Group 1, Group 2, AM, PM, etc.) area to ensure your offering is accurate. Click **“Remove”** or **“+ Add Team”** to reflect your offering.
 2. **Managing Coaches**
 - a. Scroll to the Manage Coaches area to ensure your personnel is accurate. Click **“Remove”** or **“+ Add Coach”** to reflect your personnel.
 - b. You may also click **“Edit”** to update any Coach’s Position/Title, Experience, or Record information.
- ii. Once you have verified or modified information, click **“Update Activity”**.

IMPORTANT: Management can be done from the **Manage > Activities** page as well.
If mass updates of Activities are necessary, you may use the **Import** functions on that page.

3. VERIFY KEY PERSONNEL

3a. Verify 2024-24 Key Personnel

1. Review Key Personnel for the school year to ensure it is accurate. If not, modify Key Personnel as follows.
 - a. Click **“Edit Position”** to change a person’s position within the School/District.
 - i. Modify the School/Dept, Position(s), and/or Title as needed.
 - ii. Do not modify the Permissions.
NOTE: Permissions will only matter if/when you upgrade to FinalForms’ complete service package.
 - iii. Click **“Update Role”**.
 - b. Click **“Remove”** if this person no longer serves the School/District.
 - c. Click **“+ Add”** to add Key Personnel.
 - i. Select Staff if the Key Person exists within the system.
 - ii. Click **“Click here to create one”** if the Key Person does not exist within the system.



1. To create a new Key Person:
 - a. Enter First Name, Last Name, Email Address, and other information as available.
 - b. Click **“Create Staff”**

STOP! Your 2023-24 School Year Configuration is complete. If you receive a prompt to add any additional required information, please follow the on-screen instructions.

4. MANAGE COACHES AND CERTIFICATIONS

4a. Manage Coaches

(10 minutes)

1. Click **“Manage”** at the top of your page and select **“Staff”**.
 - a. Click **“New Staff”** to add new Staff, such as a Coach.
 - b. To create a new Staff:
 - i. Enter First Name, Last Name, Email Address, and other information as available.
 - ii. Click **“Create Staff”**
 - iii. You will land on the **“Add Role”** page.

Follow steps:

 1. Enter the School/Dept, Position(s), and/or Title as needed.
 2. Do not modify the Permissions.
NOTE: Permissions only matter if you upgrade to FinalForms' complete service package.
 3. Click **“Create Role”**.
 - iv. You will land on the **“Add Sports / Activities / Groups”** page.

Follow steps:

 1. Search and select appropriate Sports / Activities / Groups
 2. Click **“Assign Staff”**

4b. Manage Certifications

(5 minutes)

1. View Certifications
 - a. Click **“Manage”** at the top of your page and select **“Staff”**.
 - b. Locate any Staff and click the **“Certification”** (countdown icon) to open a popover.
2. Add Certifications
 - a. Click **“Manage”** at the top of your page and select **“Staff”**.
 - b. Locate any Staff and click the **“Certification”** (countdown icon) to open a popover.
 - c. Click **“New Certification”** in the popover.
IMPORTANT: You may add ANY certification required by your School/District.
 - d. Input all relevant information:
 - i. Certification Title
 - ii. Certified On (optional)
 - iii. Expiration Date (or no expiration date)
 - iv. Any Notes associated with the Certification (optional)
 - e. Click **“Create Certification”**.
3. Edit Certifications
 - a. Click **“Manage”** at the top of your page and select **“Staff”**.
 - b. Locate any Staff and click the **“Certification”** (countdown icon) to open a popover.
 - c. Click **“Edit”** on any certification in the popover.
 - d. Modify all relevant information:

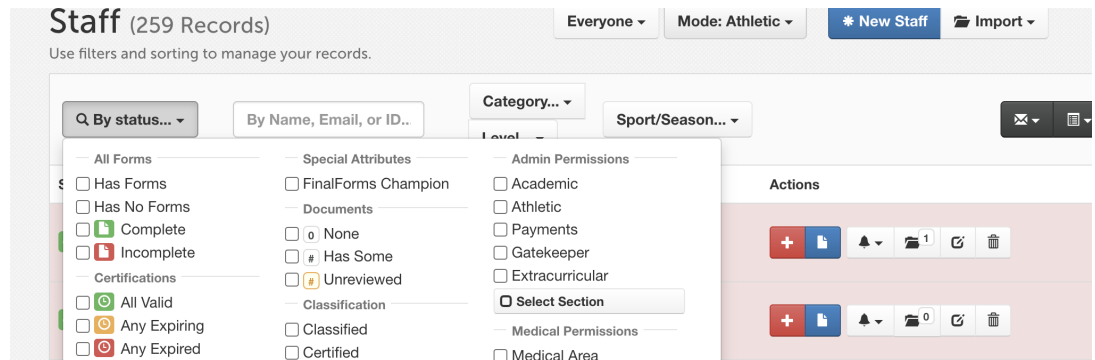


- i. Certification Title
- ii. Certified On (optional)
- iii. Expiration Date (or no expiration date)
- e. Click **“Save”**

IMPORTANT: Clicking *“Sync with my247ed”* or *“Since with NFHS will update the expiration dates of all supported certifications with the expiration date”*

4c. Managing Forms

1. Sport specific rules clinics (non hands on) will now be managed within “forms” instead of a certificate
 - a. Click **“Manage”** at the top of your page and select **“Staff”**
 - b. Locate a staff member and click on the second Icon under “status” which appears to the left of the certification countdown clock icon
 - c. This will take you into staff forms. Forms that are red are incomplete, and forms that are green are complete.
 - d. You can filter for form completion.
 - i. Click **“By Status”**
 - ii. Under the subheading “all forms” you can choose to filter for staff with forms that are incomplete “red” or complete “green”



4d. Archiving Coaches

(5 minutes)

1. Archive Coaches that no longer work within your district / school
 - a. Click **“Manage”** at the top of your page and select **“Staff”**
 - b. Locate any Staff and click the “Edit” (pencil and paper icon).
 - c. Locate the “Administrator-Only” area
 - d. Locate the “2023-2024 Status” dropdown
 - e. Click the dropdown and select **“Archived”**
 - f. Click **“Update Staff”**

IMPORTANT: The staff member will be archived, not deleted. You can access an archived staff member by clicking **MANAGE > STAFF**, then clicking the “By Status” filter and selecting “Archived” to view archived staff. This is critical if you are referencing a past issue involving this staff member.



4. Upload and Manage Rosters

IMPORTANT: The process below is applicable to WIAA schools are are not using FinalForms for athlete registration. If you are a current customer, rosters are populated through the parent sign-up process and no further steps are required.

4a. Upload Rosters

1. Roster's should be uploaded for every WIAA sport for all WIAA member schools
 - a. Click **"Manage"** at the top of your page and select **"Sports"**
 - b. Locate the sport for which you wish to upload students and select the **blue "Roster"** button
 - c. Locate the blue **"Import"** and select option 1. Create Students
 - i. This will take you into our import instructions. From here you can either download an example CSV and fill in the information for your students or create your own spreadsheet with required fields outlined on the page.
 - ii. Once you have populated your spreadsheet, save, and then use the "Choose File to Import" button to select your file and begin the import process.
 - iii. You will be taken to a screen which allows you to preview the data and ensure accuracy. Scroll to the bottom and select **"Perform Import"**
 - iv. The import will run and records imported will show in green. If any errors occur, they will populate in red with reasoning around their error.

IMPORTANT: The import will first search any current records for duplicates by checking for same: First name + Last name + DOB, Student ID, Email. If duplicate is found, this record will not import again and will show up in the red errors with the reason being duplicate record. This student can still be added to other sports in the next step.

4b. Assign Students to a Sport

1. In the previous step you created student profiles. In this step you will upload a second CSV to assign them to the roster of the sport you are in. You will next see the option **"NEXT STEP: 2. Assign Students to Sport"** Click this.

Mass create students using the FinalForms CSV format

1 Upload File 2 Verify CSV 3 Perform Import

Progress: 1/1

100%

WARNING: Some records failed to import. If unexpected, click "Download Error CSV" below, fix any issues, and re-upload.

DONE: Import successfully completed! Review likely next steps below:

Upload New File **NEXT STEP: 2. Assign Students to Sport**

- a. This will take you into our import instructions. From here you can either download an example CSV or create your own spreadsheet. **the only field that is required in this upload is either student ID or email.** though you have the option to provide any other



roster information at this time (you can also do this later, once they are assigned to the sport).

- b. Once you have populated your spreadsheet, save, and then use the “Choose File to Import” button to select your file and begin the import process.
- c. You will be taken to a screen which allows you to preview the data and ensure accuracy. Scroll to the bottom and select **“Perform Import”**
- d. The import will run and records imported will show in green. If any errors occur, they will populate in red with reasoning around their error.

4b. Assign Teams

1. Once your imports are complete you will be able to see students on your roster by going to clicking **“Back to Roster”** in the top right corner.
 - a. All students who were uploaded and assigned that sport will appear
 - b. To assign them to a specific team, use the blue **“Assign Teams”** button at the top of the page.
 - c. On this page, check marks will appear next to your rostered students and you can choose the team(s) they are on by clicking the check boxes. Once complete you will hit **“Return to Roster”** and your selections will be saved.

4b. Edit Student Roster Information

1. If you need to add or edit the roster information of a student, you can do so by clicking the blue **“Athlete Info”** Button next to the student on the roster.
 - a. From here, a box will appear that allows you to enter in any information you’d like to appear on a roster for that student. Once complete click **“Update Athlete Information”**