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## **Introduction**

Welcome to the Center of Excellence (COE) user guide series. This comprehensive collection of guides is designed to help users navigate the various processes and functionalities within the COE portal with ease and efficiency. Whether a new user or looking to deepen user understanding, these guides provide step-by-step instructions, essential resources, and expert tips to enhance user experience.

This guide is tailored for Parent/Guardian members who are registering their athletes for participation in Special Olympics through the Center of Excellence portal. We recognize the importance of providing a seamless registration process to ensure that athletes can promptly begin their journey towards empowerment and inclusion through sports. This guide will meticulously walk you through each step, from accessing the portal and completing the requirements on behalf of their athlete. By following this guide, Parent/Guardian members will be well-equipped to navigate the COE portal efficiently and with confidence, ensuring that their athletes are set up for success.

## Vocabulary Glossary

Useful & Frequently Used Terms:	
Term	Definition
Portal	The main site that SO constituents will interact with the Center of Excellence platform. This is where they can log in or create an account.
Front-End	Another way of referencing the portal – What SO constituents will see and interact with.
Sandbox Environment	Also called “UAT” this is a test version of the portal – where you can train and test using data that will not impact a users’ experience.
Production Environment	Also called “Live Portal” – This is the version of the COE platform that constituents will use to manage their experience with SO.
User	Indicates the Athlete, Volunteer, Coach or Circle of Care member in the user guide – General term for indicating someone using the portal.
Account	Also called “Profile” – This is a users’ information, personal to them.
Register Zone	Indicates the user experience of someone with the role of Circle of Care (Parent/Guardian) this is a tailored portal view specific to the needs of what a Circle of Care member would interact with.
Prospect	This status reason is automatically assigned and is default for all users. This status means that the contact was created, the profile information has not been populated or is partially populated. At this point they are not considered to be an Athlete, Volunteer or Circle of Care member.
Dynamics	Also called “the Backend” – This is the staff side of the COE solution, where staff can view and interact with individual profiles, forms and events.
Role	Indicates how a user will interact with the portal. A role can be either Athlete, Circle of Care or Volunteer. A user can be more than one of these roles, after the initial account creation process.
Landing Zone	Indicates the screen a user will see after their account creation is completed – Dependent on the role a user selects.
Checklist	References the list of requirements for participation in an SO Program. This checklist can include items such as Health History forms, signature forms, training and more.
Status Reason	Indicates a variety of different status related to a checklist item. These status reasons are: Incomplete, Saved, Submitted, Under Review, Approved, Rejected, Expired, Missing Information, Abandoned.
Incomplete	Indicates a checklist item that has not been started or completed by a user.
Related Form	Indicates a document such as a Release, Waiver or Health History Form.

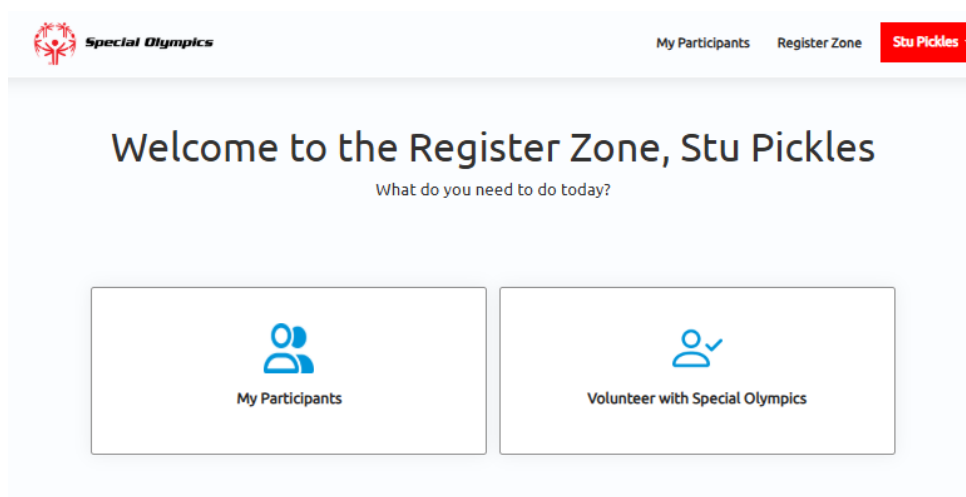
Submitted	Automatic status when a related form has been submitted.
Under Review	Used by staff or a team member to indicate that a form is being reviewed.
Approved	Used by staff or team members to indicate that a form has been reviewed and information is complete and accurate.
Expired	Automatic status when a related form or certification is no longer valid based on initial signature date and SO Program policy.
Missing Information	Used by staff or team members to indicate that there is missing information in the form. This will trigger a draft email notification that can be sent to the contact with a request of pending information.
Abandoned	Used by staff or team members to indicate that the form has not been submitted, it stays in the saved status, and then was abandoned by the contact.
Source	Indicates the Role that the checklist item/related form originates from. These can be roles such as Athlete, Coach, Class B Volunteer etc.
Shift	These are event shifts associated with a given event that Volunteers/Coaches/Athletes can be registered for. You may also see this referred to as Engagement Opportunity Schedules, Volunteer Schedules, or Athlete Competition Shifts.
Register on Behalf	To complete a registration process on behalf of an athlete.
Profile Status	Indicates the status of a new users profile – Can be Incomplete or Complete
Registration Status	Indicates the status of a user’s eligibility for participation. Can be “Applicant” or “Completed”
Participation Type	Indicates the role that a user is acting as or applying to be. Examples; Athlete, Unified Partner, Coach.
Qualification Status	Indicates a group of checklist items, forms, or training to be completed. Pertains to a user’s Participation Type.

## Section A: Accessing the Portal

1. Access the portal by visiting either the [Sandbox](#) or [Production](#) environment. If purely testing and learning the COE product, it's recommended to use the Sandbox portal environment.



2. This guide assumes that the user has already familiarized themselves with the account creation process. If not, please reference the **Account Creation User Guide**.
3. One **important** note to make is for users intending to create a portal account as a Parent/Guardian member, that they should first use information pertaining to **themselves** as the Parent/Guardian. Information regarding the Athlete will be gathered later in the registration process.
4. Log in or create an account with the selected role being "Parent/Guardian" – Doing so brings the user to the landing page of the Register Zone.



## Section B: Navigating the Register Zone

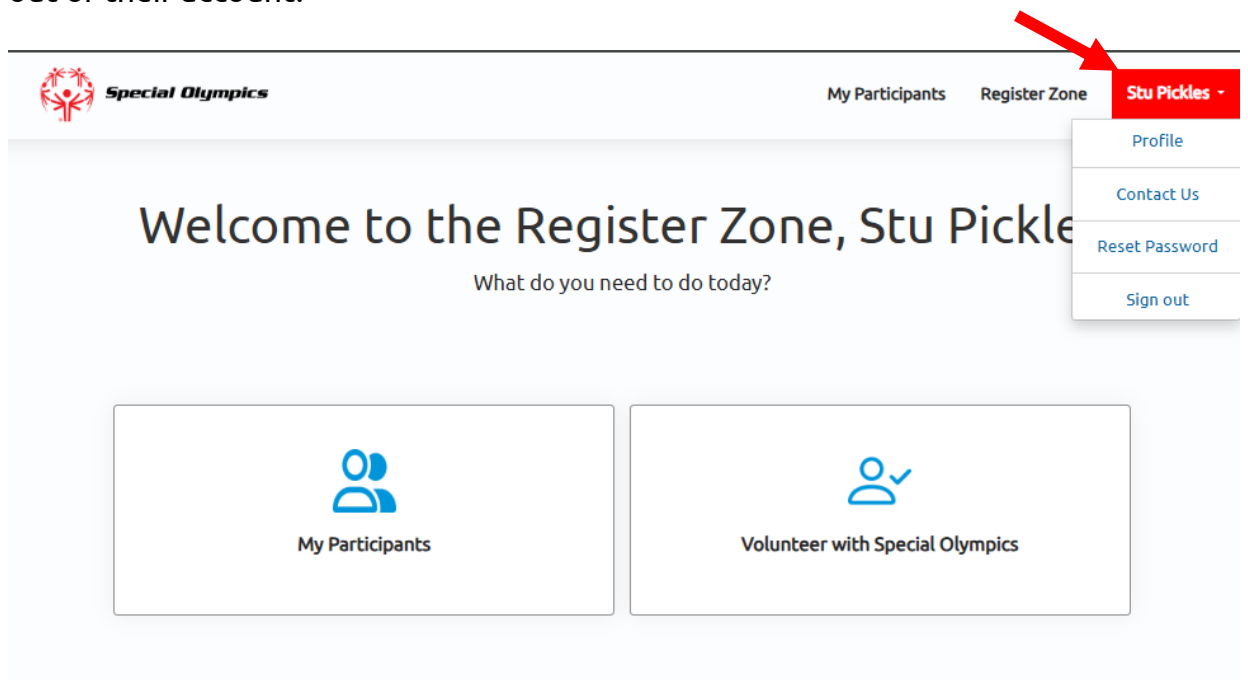
1. At the top of the Register Zone page, the user will see a variety of different headers, each doing some sort of specific functionality. Clicking on any of these options will navigate the user to a new view of the Register Zone.



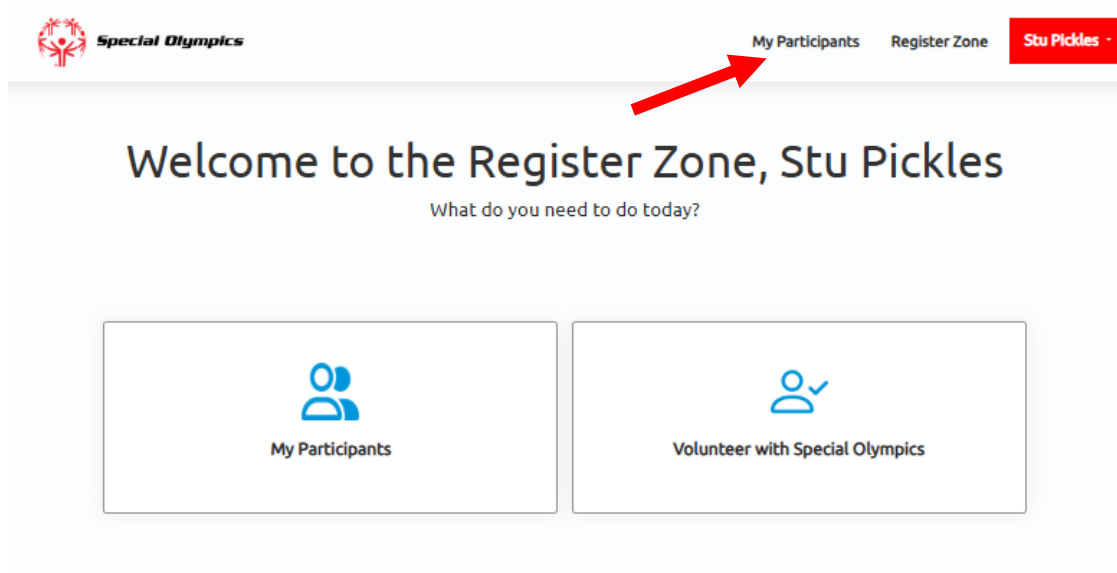
2. A user can treat the "**Register Zone**" text as a "**Home**" button, clicking on this button will take the user back to the landing page of the Register Zone, where they can continue to access different sections.



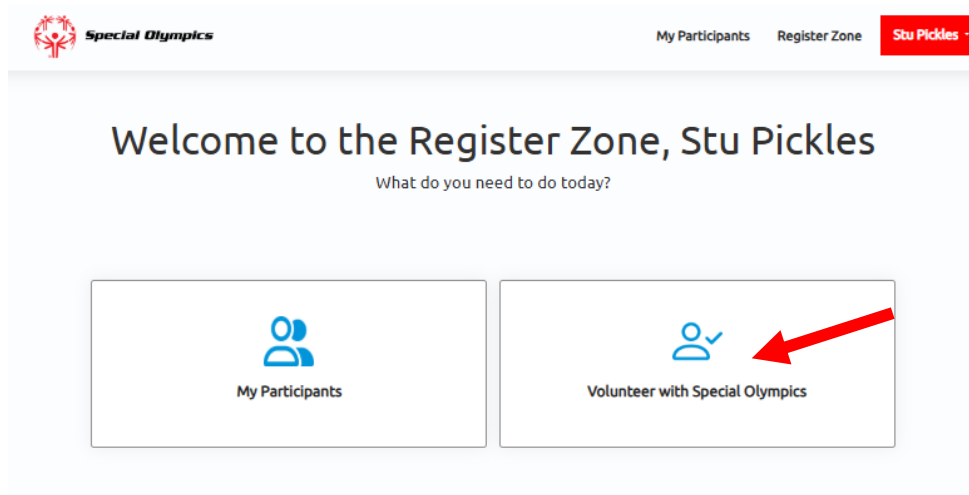
3. To see additional information regarding a user's profile, select the drop-down menu on the button that contains the user's name. This drop-down menu contains additional navigation buttons that allow the user to update information, contact the Special Olympics program, reset a password or sign out of their account.



4. The **"My Participants"** button on the header, will take the Parent/Guardian to a page containing information regarding any athlete(s) they are the parent/guardian for. Here the Parent/Guardian will be able to view information regarding their athlete and manage forms and checklist items.



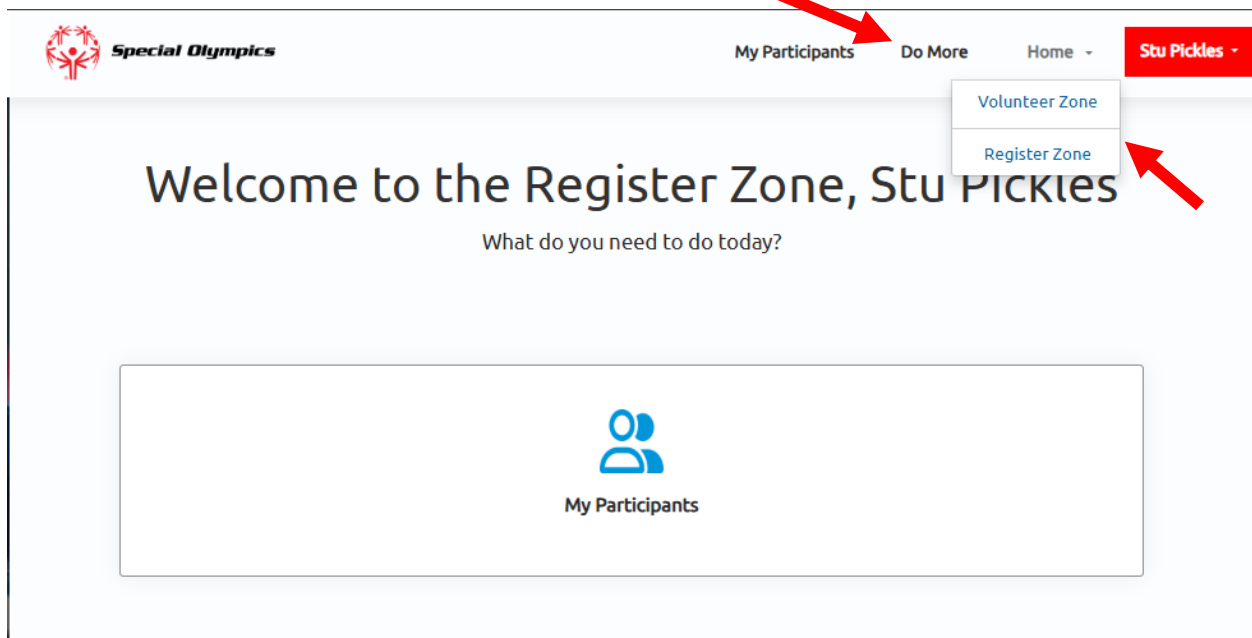
5. The user will see one additional tile called **"Volunteer with Special Olympics"** on the Registration Zone page. Clicking this tile will give the user access to the Volunteer Zone and any additional information needed to be able to register to volunteer or apply for more roles with Special Olympics.



6. Once the “**Volunteer with Special Olympics**” tile is selected the user will now have access to two zones and the tile will no longer be available to select.

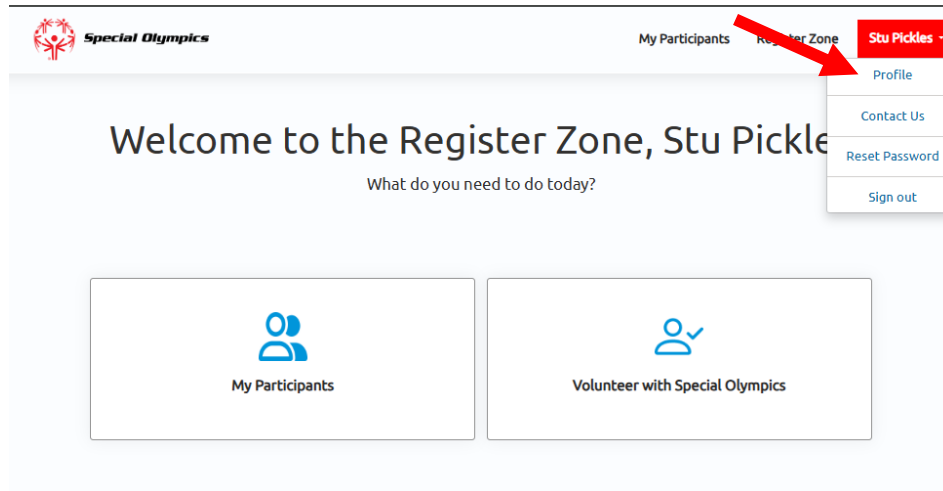
**NOTE: For more information regarding the Volunteer Portal experience please refer to the Volunteer Portal User guide.**

- a. Once the user has selected “Volunteer with Special Olympics” they will have the option to “Do More”. **Please refer to the Volunteer Portal for more detailed information on the “Do More” options.**



## Section C: Updating an Parent/Guardian Profile

1. Select the drop-down menu under the Parent/Guardian’s name on the top-right corner of the portal page and select “**Profile**”



2. Opening the Profile page takes the Parent/Guardian to a summary view of the account questions they were asked when creating the initial profile, including new fields for “**Profile Photo**” & “**Biography**”. Fields that a user can update are indicated by solid white boxes, whereas fields that are locked are indicated by a grayed-out box. **NOTE: Some information will be locked to users but can be updated via the Dynamics Backend by an SO staff member.**

Profile Photo

Profile Photo  
 No file selected

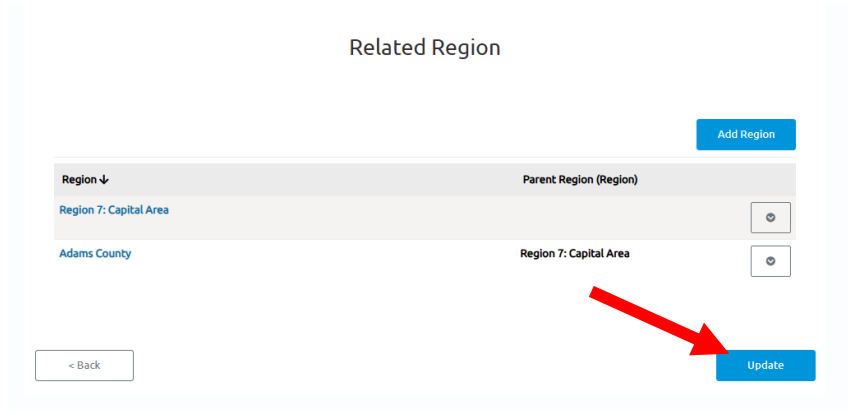
We'll start with a few things about you

<p><b>First Name *</b></p> <input type="text" value="Stu"/>	<p><b>Middle Name</b></p> <input type="text"/>
<p><b>Last Name *</b></p> <input type="text" value="Pickles"/>	<p><b>Suffix</b></p> <input type="text"/>
<p><b>Preferred Name</b></p> <input type="text" value="Stu Pickles"/>	<p><b>Email</b></p> <input type="text" value="Jlieblich+qa2@specialolympics.org"/>
<p><b>Country Code (Primary Phone) *</b></p> <input type="text" value="United States (+1)"/>	<p><b>Phone *</b></p> <input type="text" value="9849849844"/>

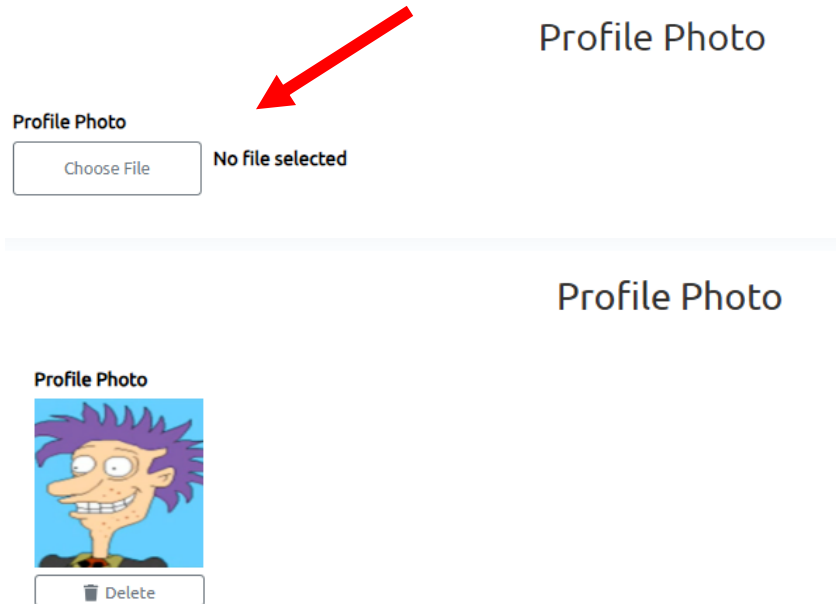
When were you born?

**Date of Birth \***

- Once a user has updated any necessary profile information, navigate to the bottom of the portal page and click **"Update"** to update the fields.



- To add a Profile Photo, navigate to the Profile Photo section at the top of the page. Select **"Choose File"** button. Depending on how the user interacts with the portal, this will either open the File Explorer, or the Photo Reel on their mobile device. Select an image to be used, then navigate to the **"Update"** button at the bottom of the portal page. **NOTE: Images can be removed from a profile via the Dynamics Backend application.**



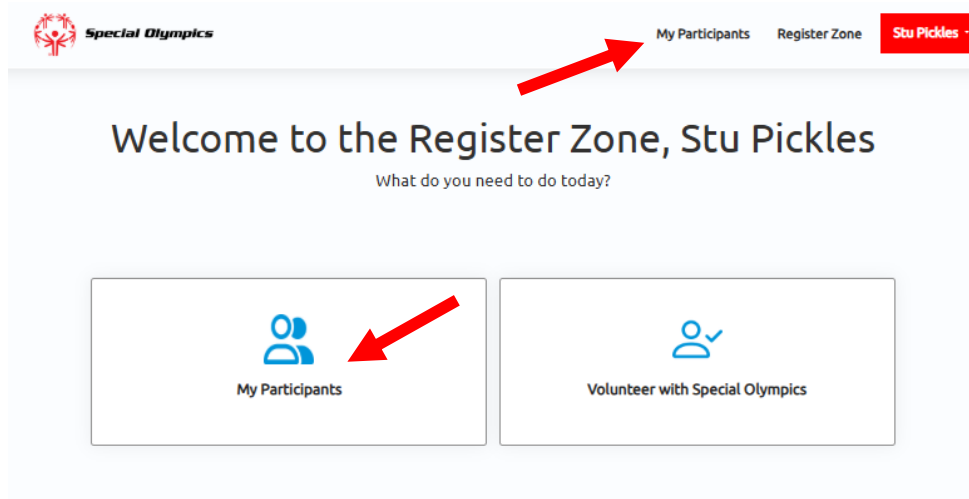
5. To add a biography as a Parent/Guardian user, navigate to the "**Biography**" section of the Profile portal page. This field is an open text box, allowing the user to tell the SO program about themselves and their Special Olympics journey. This is an optional field and can be updated or removed via the Dynamics Backend application. Once a user has completed a biography, click the "**Update**" button to save.

Biography

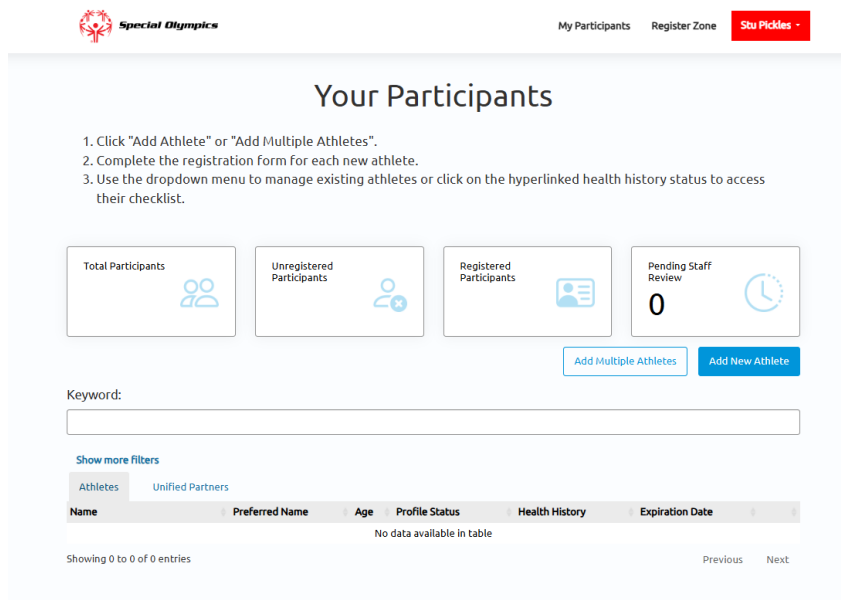
This is where I could put my SO journey.

## Section D: Registering a New Athlete

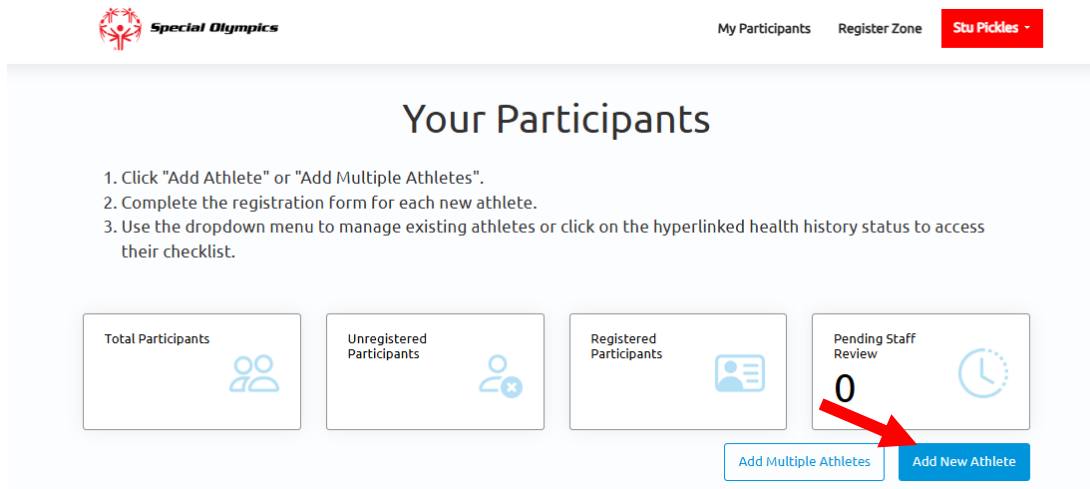
1. Managing an Athlete’s eligibility is the main function of the Parent/Guardian Register Zone. Navigate to **“My Participants”** to begin adding & managing an athlete.



2. On this portal page, the user will see information regarding their athletes, as well as the ability to add a new athlete to their roster if this is their first time participating. **NOTE: For migrated users, a Parent/Guardian should expect to see their athlete already on their roster. This may not always be the case. NOTE: This guide will be updated to the new look-up tool in the future.**

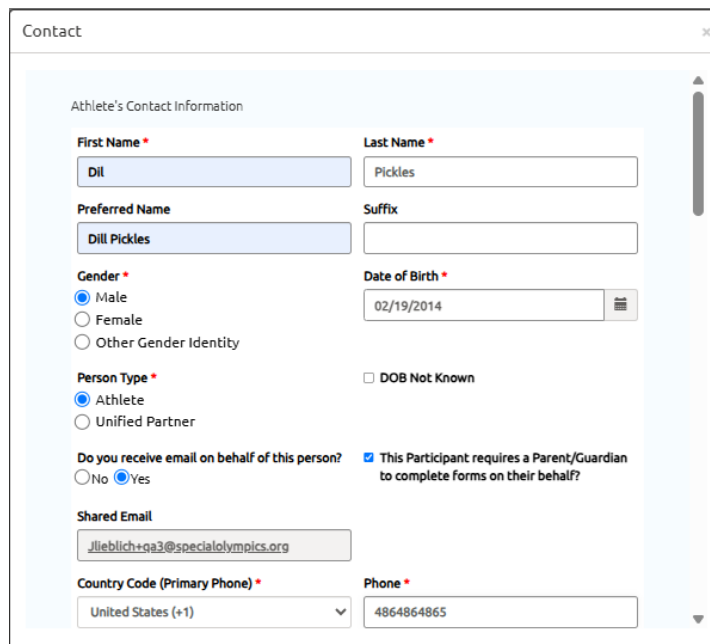


- To begin with adding a new athlete, there are two options the user sees. **“Add Multiple Athletes”**, indicating a bulk upload of athletes to their roster, or **“Add New Athlete”** which indicates adding a singular athlete to their roster. Click **“Add New Athlete”** to begin adding a singular athlete. **\*As a Parent/Guardian in the Register Zone, they should only be adding athlete they are the parent/guardian of.**



The screenshot shows the 'Your Participants' dashboard. At the top, there is a navigation bar with 'My Participants', 'Register Zone', and a user profile 'Stu Pickles'. The main content area has a heading 'Your Participants' and three numbered instructions: 1. Click 'Add Athlete' or 'Add Multiple Athletes'. 2. Complete the registration form for each new athlete. 3. Use the dropdown menu to manage existing athletes or click on the hyperlinked health history status to access their checklist. Below the instructions are four data cards: 'Total Participants' (with a person icon), 'Unregistered Participants' (with a person and plus icon), 'Registered Participants' (with a person and ID card icon), and 'Pending Staff Review' (with a clock icon and the number '0'). At the bottom right, there are two buttons: 'Add Multiple Athletes' and 'Add New Athlete'. A red arrow points to the 'Add New Athlete' button.

- Clicking this button will create a pop-up, containing fields for information pertaining to an Athlete’s contact information. Begin entering the information specified in each box. **Red asterisks (\*)** indicate required information.



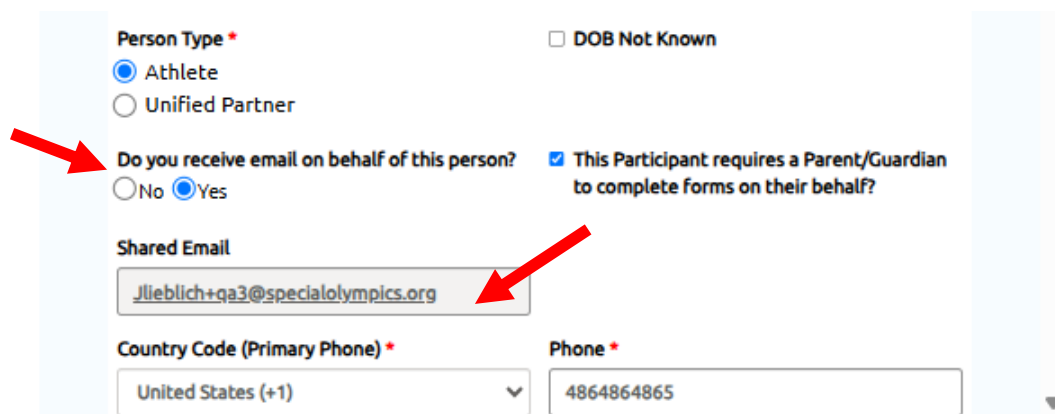
The screenshot shows a 'Contact' pop-up form titled 'Athlete's Contact Information'. The form contains the following fields and options:

- First Name \***: Text input with value 'Dill'
- Last Name \***: Text input with value 'Pickles'
- Preferred Name**: Text input with value 'Dill Pickles'
- Suffix**: Text input (empty)
- Gender \***: Radio buttons for Male (selected), Female, and Other Gender Identity
- Date of Birth \***: Date picker with value '02/19/2014' and a calendar icon
- Person Type \***: Radio buttons for Athlete (selected) and Unified Partner; a checkbox for 'DOB Not Known' is also present.
- Do you receive email on behalf of this person?**: Radio buttons for No and Yes (selected)
- This Participant requires a Parent/Guardian to complete forms on their behalf?**: Checked checkbox
- Shared Email**: Text input with value 'jlieblich+qa3@specialolympics.org'
- Country Code (Primary Phone) \***: Dropdown menu with value 'United States (+1)'
- Phone \***: Text input with value '4864864865'

- If the athlete you are registering for is under 18 or not their own guardian, you will need to select the box **“This Participant requires a Parent/Guardian to complete forms on their behalf?”**.

This Participant requires a Parent/Guardian to complete forms on their behalf?

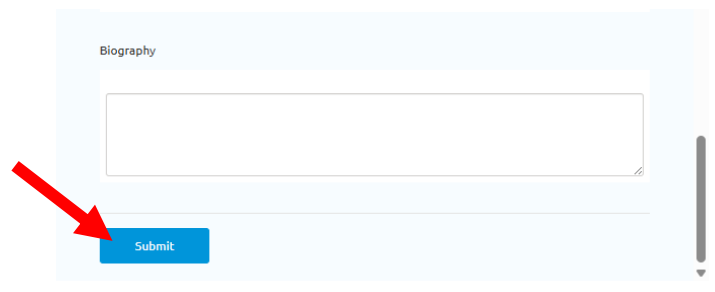
- Do you receive emails on behalf of this person?** If the Parent/Guardian user anticipates fully managing the Athlete’s profile, the user should indicate **“Yes”** to this question. This indication will populate the email field with the Parent/Guardian user’s email and all portal correspondence will go to the indicated email. **NOTE: By indicating yes, the Athlete would not have a unique email address to log into a portal account. If the Athlete user desires this access, they would need to create a new account and a SO staff member to merge the information together.**



The screenshot shows a registration form with the following fields and selections:

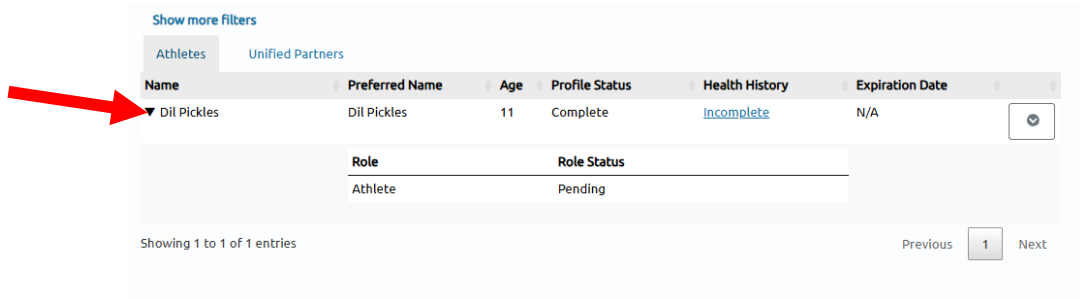
- Person Type \***:  Athlete,  Unified Partner
- DOB Not Known
- Do you receive email on behalf of this person?**:  No,  Yes
- This Participant requires a Parent/Guardian to complete forms on their behalf?
- Shared Email**:  (indicated by a red arrow)
- Country Code (Primary Phone) \***: United States (+1) (dropdown menu)
- Phone \***:

- Once all fields have been completed, click the blue **“Submit”** button to complete the profile creation of the Athlete.

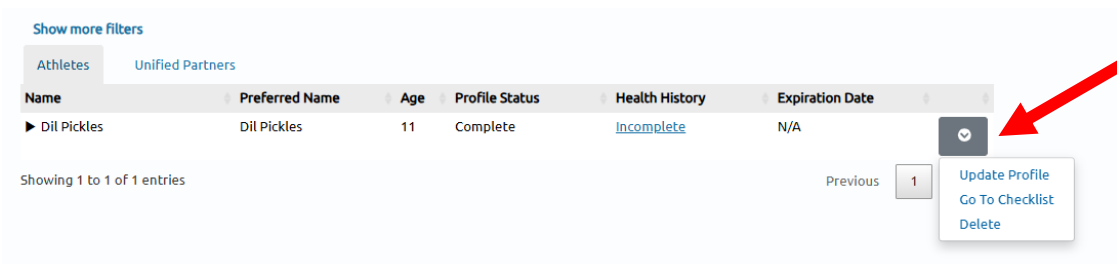


The screenshot shows a Biography form with a large text input area and a blue **Submit** button at the bottom. A red arrow points to the Submit button.

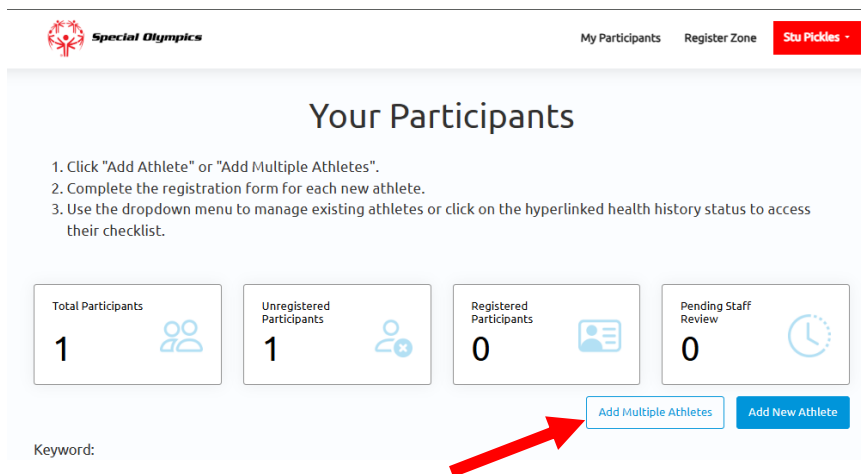
- 8. Once the Athlete has been added to the Parent/Guardian’s roster, the user will see additional information regarding their eligibility. Information regarding their Role and Role Status, Health History and Expiration Dates are available on this screen. Click the “**Down Arrow**” on the left side of the screen to view more information regarding the Athlete user.



- 9. On the right-side drop-down menu, the user will have three options. Update Profile, which will update information pertaining to the Athlete user (Refer to [Section C](#) for more information about the Profile update process). “**Go to Checklist**” refers to the Athlete Checklist, which a Parent/Guardian will be able to access, and add/manage forms related to the athlete’s eligibility for participation. “**Delete**” will remove the athlete from the roster.



- 10. To add Multiple Athletes to the roster, click “**Add Multiple Athletes**”.



- Clicking this brings the user to a new portal screen with a downloadable file to complete for bulk registration. Click the blue hyperlink "**Download Excel Template**" to start.

## Add Multiple Athletes

For adding multiple athletes, download the Excel template to see some general instructions:

[Download Excel Template](#)

And then click the button below

[Upload Athletes](#)

---

Back
Save and Continue

- Clicking this will download an excel template for the Parent/Guardian user to populate fields relevant to their athlete(s). The user will need to provide information for all applicable columns, then save the template, and navigate back to the portal to upload.

	A	B	C	D	E	F
1	First Name	Last Name	Preferred Na	Date of Birth	Gender	Person Type
2	Angelica	Pickles	Angelica	3/18/2010	Female	Athlete
3	Charles	Finster	Chuckie	4/18/2012	Male	Athlete
4	Kimiko	Finster	Kimi	9/15/2015	Female	Athlete
5						

- Once the user has populated the excel file fields, navigate to the portal page and click "**Upload Athletes**"

## Add Multiple Athletes

For adding multiple athletes, download the Excel template to see some general instructions:

[Download Excel Template](#)

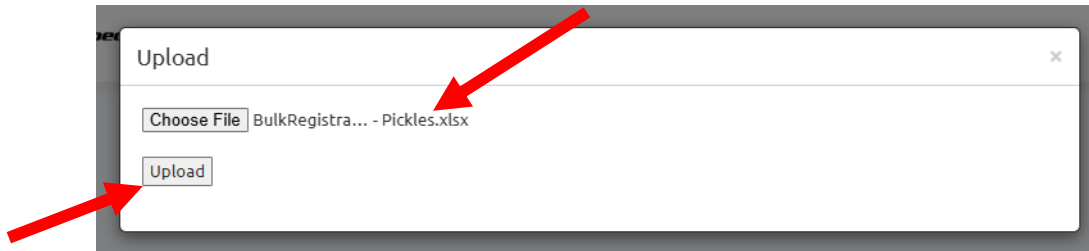
And then click the button below

[Upload Athletes](#)

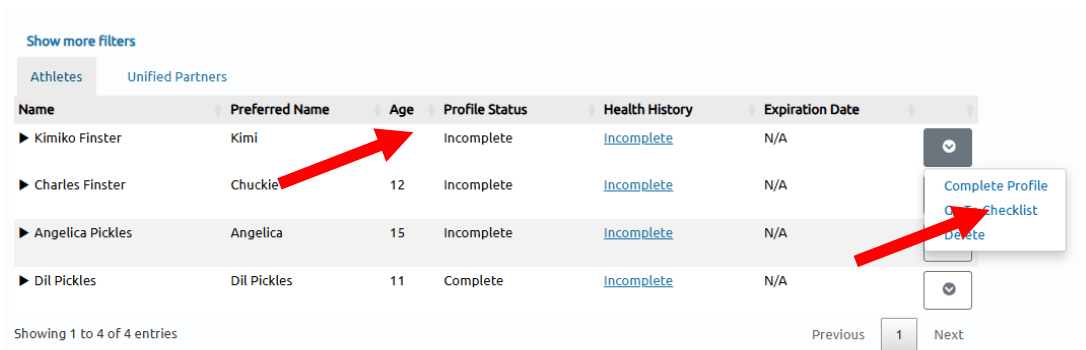
---

Back
Save and Continue

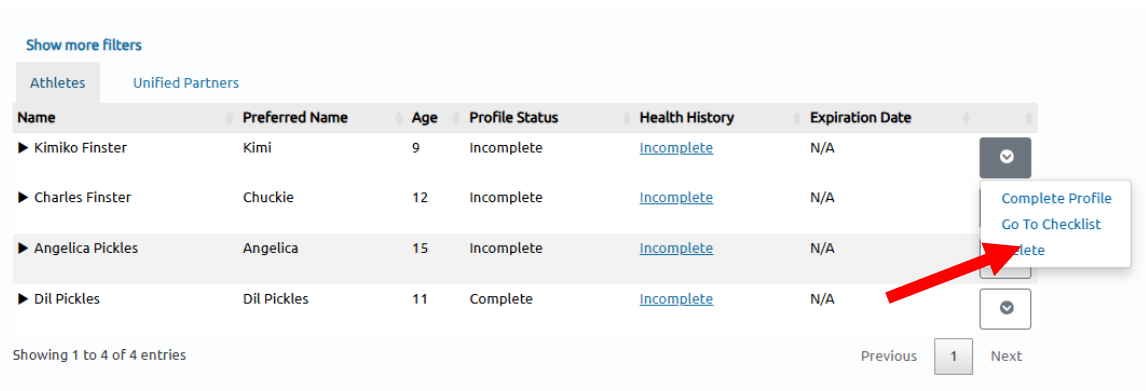
14. Via the pop-up window, click "**Choose File**" and select the saved version of the template downloaded in Step 11 & 12. Click "**Upload**" once selected. **NOTE: The user must close out of the excel file document before uploading.**



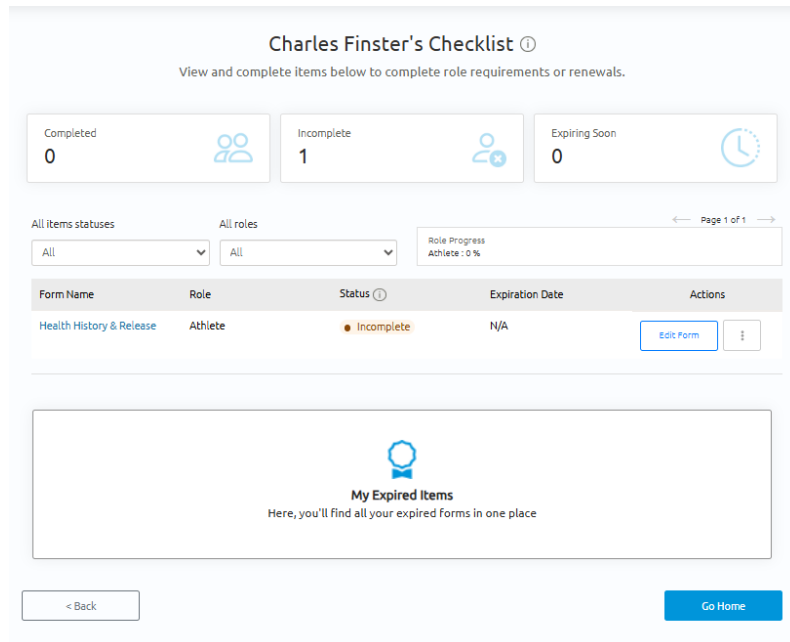
15. Once uploaded, the user will be redirected back to the "**Your Participants**" screen. Here the user will see the newly added Athletes & will be able to complete their profile information. Click the drop-down arrow and click "**Complete Profile**". Refer to [Step 4-7](#) in this guide for steps regarding the profile questions. Once Profile is complete the status will read complete.



16. To begin completing relevant registration documents, forms and checklist items, click "**Go to Checklist**" on the drop-down menu.



17. On the checklist, the Parent/Guardian user will see the required items that they will need to complete on behalf of their athlete. **NOTE: Depending on SO Program policies, this list may look different than the examples provided. This list is configurable depending on requirements.**



Charles Finster's Checklist ⓘ  
View and complete items below to complete role requirements or renewals.

Completed 0    Incomplete 1    Expiring Soon 0

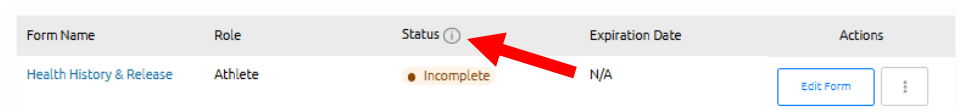
All items statuses: All | All roles: All | Role Progress: Athlete: 0%

Form Name	Role	Status ⓘ	Expiration Date	Actions
Health History & Release	Athlete	Incomplete	N/A	<a href="#">Edit Form</a> ⓘ

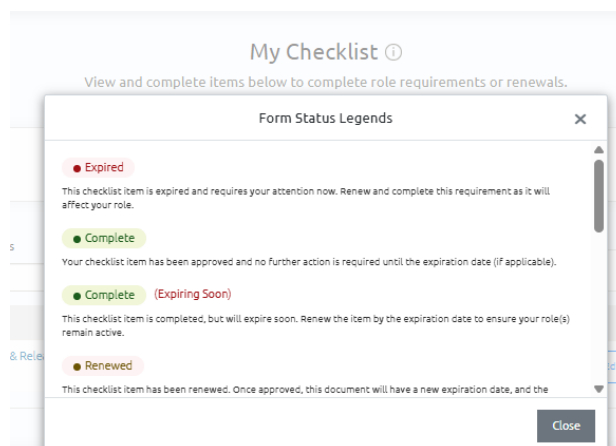
**My Expired Items**  
Here, you'll find all your expired forms in one place.

< Back    Go Home

18. By selecting the information icon next to "Status" it will provide a "For Status Legend" for what the status of the forms means.



Form Name	Role	Status ⓘ	Expiration Date	Actions
Health History & Release	Athlete	Incomplete	N/A	<a href="#">Edit Form</a> ⓘ



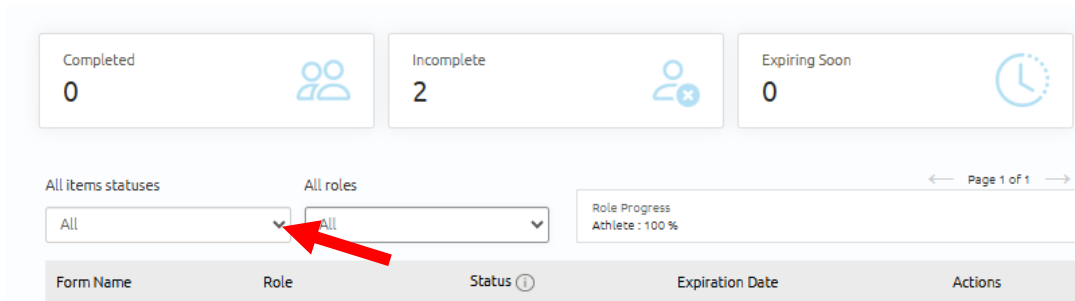
My Checklist ⓘ  
View and complete items below to complete role requirements or renewals.

**Form Status Legends** ⓘ

- Expired**  
This checklist item is expired and requires your attention now. Renew and complete this requirement as it will affect your role.
- Complete**  
Your checklist item has been approved and no further action is required until the expiration date (if applicable).
- Complete (Expiring Soon)**  
This checklist item is completed, but will expire soon. Renew the item by the expiration date to ensure your role(s) remain active.
- Renewed**  
This checklist item has been renewed. Once approved, this document will have a new expiration date, and the

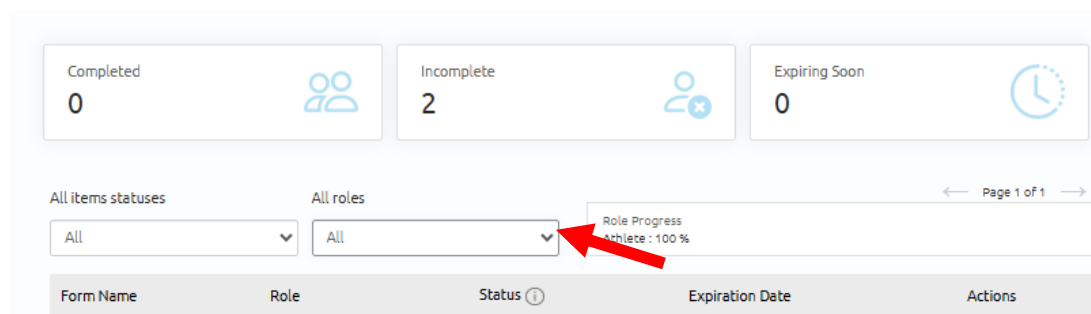
Close

19. There are a few different ways to sort the Checklist Items. The list can be sorted by “All Status Items”, by using the drop down under “All Items Statuses” it will list what status you have and when one is selected it will only show those forms.



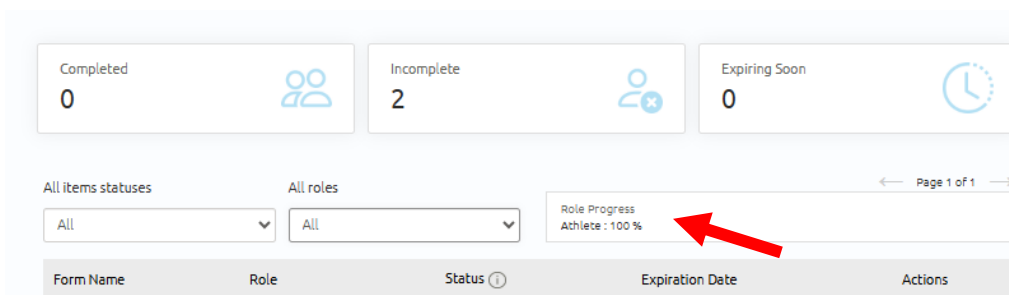
The screenshot shows a dashboard with three summary cards: 'Completed' (0), 'Incomplete' (2), and 'Expiring Soon' (0). Below these are two dropdown menus: 'All items statuses' (set to 'All') and 'All roles' (set to 'All'). A red arrow points to the 'All items statuses' dropdown. To the right is a 'Role Progress' box showing 'Athlete : 100 %'. Below the filters is a table header with columns: 'Form Name', 'Role', 'Status', 'Expiration Date', and 'Actions'.

20. They can also sort by their forms associated with each role. By using the drop down and selecting what role this will then only pull the forms required for that role.



This screenshot is identical to the previous one, but a red arrow points to the 'All roles' dropdown menu.

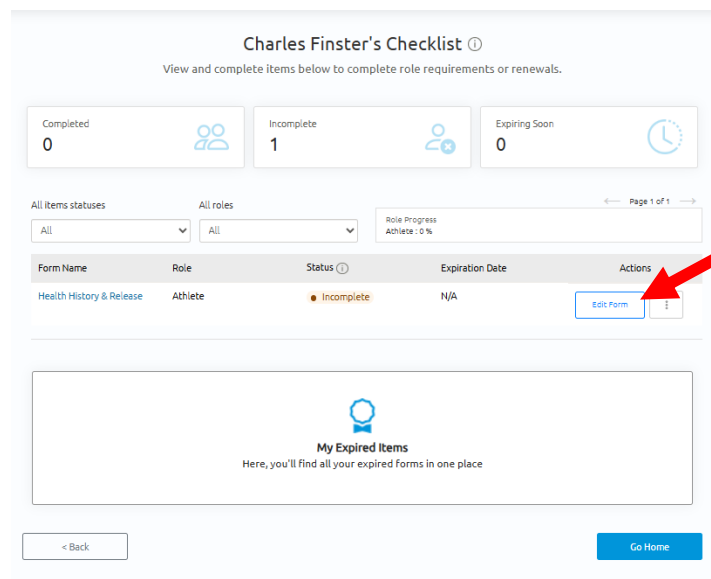
21. All Checklists will also have a “Role Progress” box. This will show the % of the forms completed for that role.



This screenshot is identical to the previous ones, but a red arrow points to the 'Role Progress' box, which displays 'Athlete : 100 %'.

22. The main functionality of the Athlete Checklist is the completion of the Health History & Release form. By clicking on the blue hyperlink or the Edit Form Button, the process of providing relevant information regarding their medical needs will begin.

Currently, this checklist item is marked as **“Incomplete”** indicating to the user that they will need to click into the item and complete it in its entirety. As the Parent/Guardian completes the information, the status of the form will be updated. Refer to the [Glossary Section](#) for more information regarding the unique status reasons of related forms.



Charles Finster's Checklist ⓘ  
View and complete items below to complete role requirements or renewals.

Completed 0    Incomplete 1    Expiring Soon 0

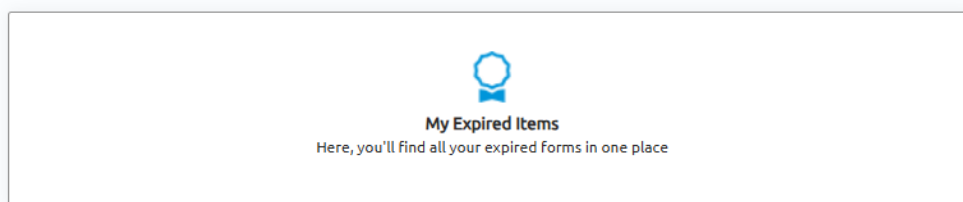
All items statuses: All | All roles: All | Role Progress: Athlete: 0%

Form Name	Role	Status ⓘ	Expiration Date	Actions
Health History & Release	Athlete	Incomplete	N/A	<a href="#">Edit Form</a> ⓘ

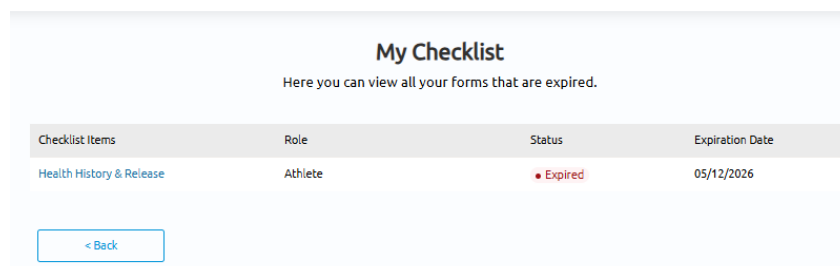
**My Expired Items**  
Here, you'll find all your expired forms in one place

< Back    Go Home

23. The **“My Expired Items”** button will take the Athlete to a portal page containing historical information regarding any forms they have previously submitted to the portal that have since expired.



**My Expired Items**  
Here, you'll find all your expired forms in one place



**My Checklist**  
Here you can view all your forms that are expired.

Checklist Items	Role	Status	Expiration Date
Health History & Release	Athlete	Expired	05/12/2026

< Back


## Section E: Completing the Health History Form

1. Completing the Health History Form is an important step in any Athlete’s journey to becoming eligible for participation with a SO Program. To initiate the process, select the blue hyperlink titled “**Health History & Release**”


### Charles Finster's Checklist ⓘ

View and complete items below to complete role requirements or renewals.


Completed  
**0**



Incomplete  
**1**



Expiring Soon  
**0**



All items statuses: All | All roles: All | Role Progress: Athlete : 0 %

← Page 1 of 1 →


Form Name	Role	Status <span>ⓘ</span>	Expiration Date	Actions
<a href="#">Health History &amp; Release</a>	Athlete	● Incomplete	N/A	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #007bff; padding: 2px 5px; margin-right: 5px;">Edit Form</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">⋮</div> </div>

2. The series of the following screens will walk the Parent/Guardian through answering important questions regarding their **athlete’s health**. To continue the process, click “**Let’s Do This**”

Your progress  
0%  
Registration

What to expect for the Health History & Release.

The Health History & Release is broken into a few sections. We will ask one question at a time. After each question, the form will save by itself, so feel free to come back at a later time to finish. Click "Let's Do This!" to start.

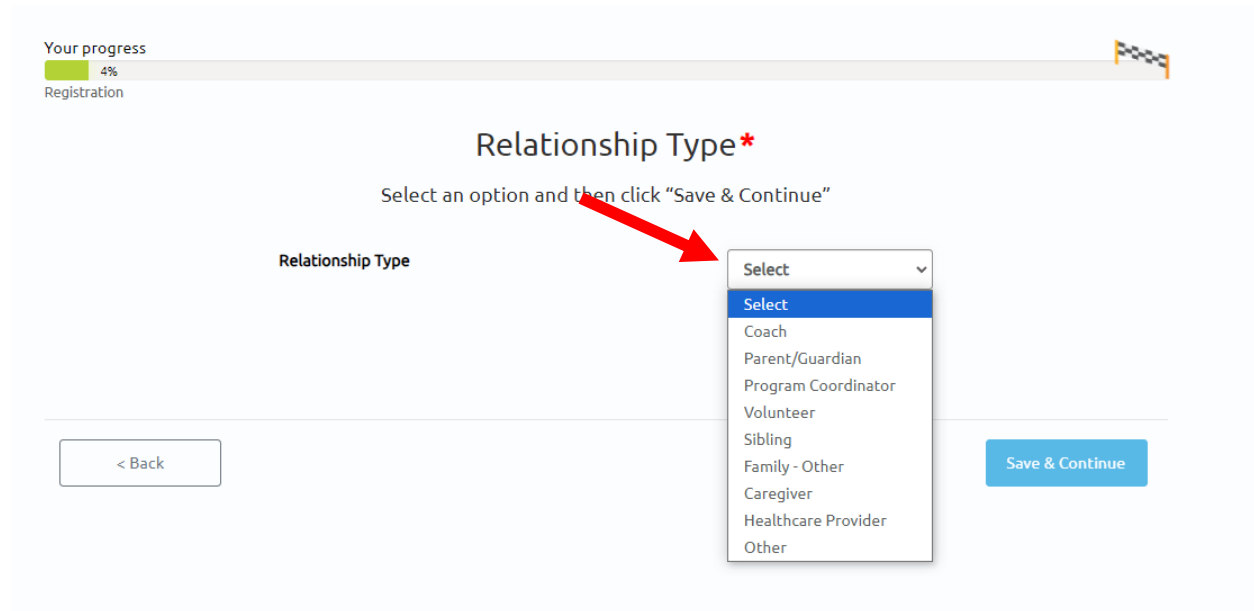


< Back

Go Home

Let's Do This!

3. **Relationship Type:** A Parent/Guardian user will first be asked to indicate their relationship with the Athlete. Users will utilize the drop-down menu to select the appropriate relationship. Click "**Save & Continue**" to move forward.



Your progress  
4%  
Registration

### Relationship Type \*

Select an option and then click "Save & Continue"

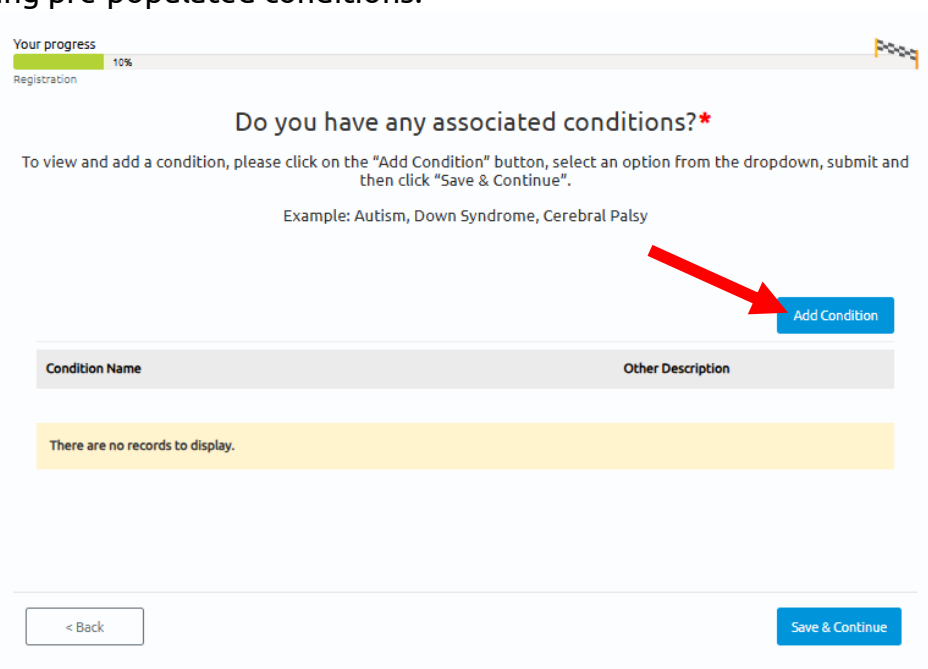
Relationship Type

- Select
- Coach
- Parent/Guardian
- Program Coordinator
- Volunteer
- Sibling
- Family - Other
- Caregiver
- Healthcare Provider
- Other

< Back

Save & Continue

4. **Associated Conditions:** This question allows a Parent/Guardian to add relevant conditions for their athlete. Click "**Add Condition**" to open the pop-up box containing pre-populated conditions.



Your progress  
10%  
Registration

### Do you have any associated conditions? \*

To view and add a condition, please click on the "Add Condition" button, select an option from the dropdown, submit and then click "Save & Continue".

Example: Autism, Down Syndrome, Cerebral Palsy

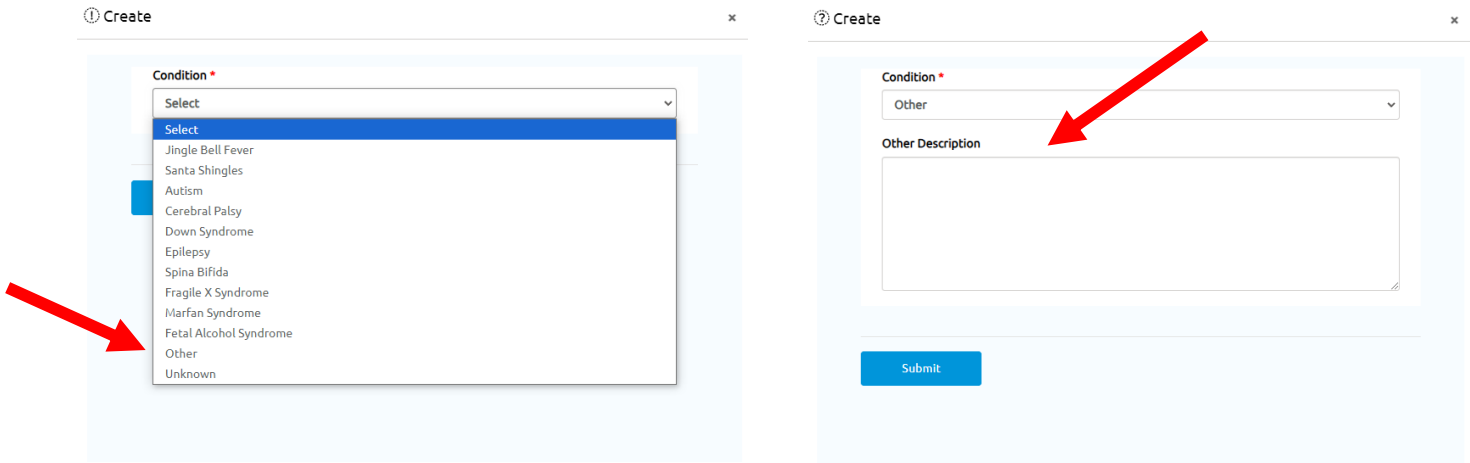
Add Condition

Condition Name	Other Description
There are no records to display.	

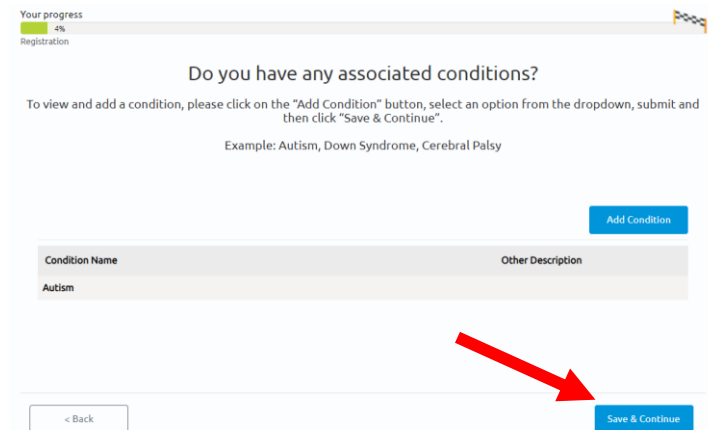
< Back

Save & Continue

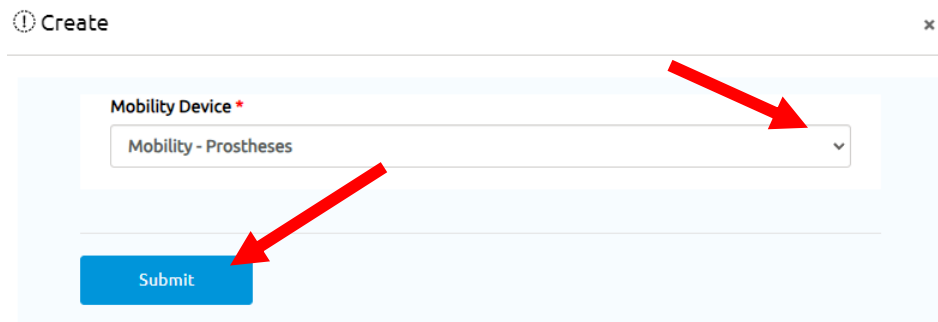
5. Via this pop-up, the Parent/Guardian should select all individual conditions that are applicable to their athlete. By selecting “**Other**” an additional text box will populate allowing the Parent/Guardian to manually type a condition.



6. Click “**Submit**” to add the condition. Repeat the process for all conditions, then click “**Save & Continue**” to move on.



7. **Mobility Devices:** The same format as the previous question. Indicate all that apply, click “**Submit**” and then “**Save & Continue**” to move on.



8. **Lifestyle Aids:** The same format as the previous question. Indicate all that apply, click "**Submit**" and then "**Save & Continue**" to move on. **NOTE: If a user needs to go back to a previous screen and update information, click "Back" on the left side of the screen.**

Your progress 13%

Registration

### Do you use any lifestyle aids?

To view and add lifestyle aids, please click on the "Add Lifestyle Aid" button, select an option from the dropdown, submit and then click "Save & Continue".

Example: CPAP, Dentures, Glasses

Add Lifestyle Aid

Lifestyle Aid	Other Description
Glasses, contact lenses, protective eyewear	
CPAP	
Dentures	

< Back
Save & Continue

9. **Communication Devices:** The same format as the previous question. Indicate all that apply, click "**Submit**" and then "**Save & Continue**" to move on. **NOTE: This question, and the previous questions are optional – If a user does not have any devices, they can click "Save & Continue" to move forward.**

Your progress 18%

Registration

### Do you use any communication devices?

To view and add a communication devices, please click on the "Add Communication Device" button, select an option from the dropdown, submit and then click "Save & Continue".

Example: Hearing aid, Communication Devices, Sign Language

Add Communication Device

Device	Other Description
There are no records to display.	

< Back
Save & Continue

10. **Medical Devices:** The same format as the previous question. Indicate all that apply, click **“Submit”** and then **“Save & Continue”** to move on. **NOTE: The Save & Continue functionality updates information in the Dynamics Backend Application, meaning that a staff member can walk through the process with an athlete over the phone and monitor progress through answering the questions.**

Your progress  
Registration 22%

Do you use any medical devices?

To view and add medical devices, please click on the “Add Medical Device” button, select an option from the dropdown, submit and then click “Save & Continue”. If you don't use any medical devices, click “Save & Continue”.

Example: Implantable Cardioverter Defibrillator, VP Shunt, Pacemaker

Add Medical Device

Medical Device	Other Description
Implantable Device for Seizure Management	

< Back Save & Continue

11. **Dietary Requirements:** This question, as well as many of the following questions are **required, indicated by the red asterisk (\*)**. These questions are examples of **“If Yes, please explain”** style questions. Once answered, click **“Save & Continue”**

Your progress  
Registration 27%

Do you have a specific dietary requirement?\*

This includes any dietary requirements from your doctor. If you do not have any food or drink restrictions, please click “No” and then click “Save & Continue”.

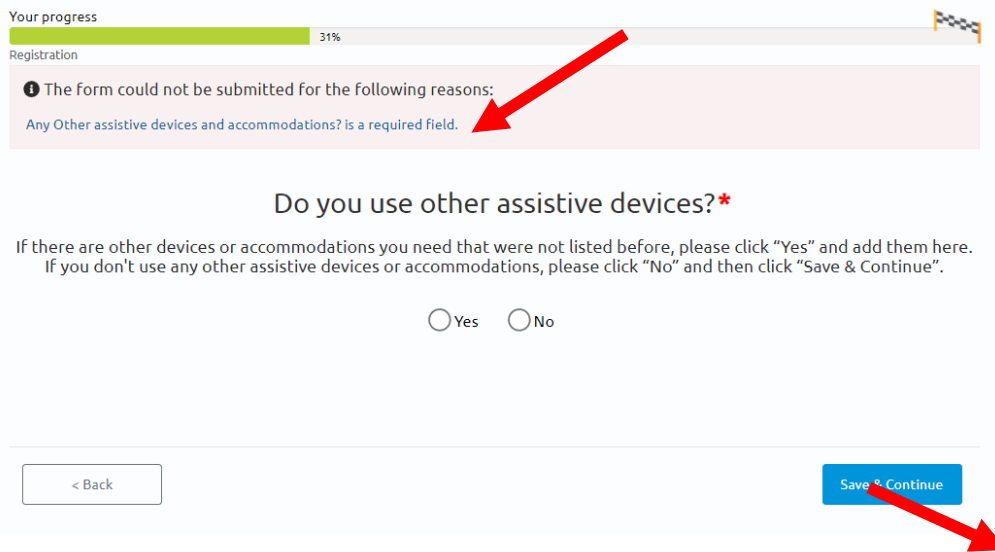
Yes  No

Please specify your dietary requirement \*

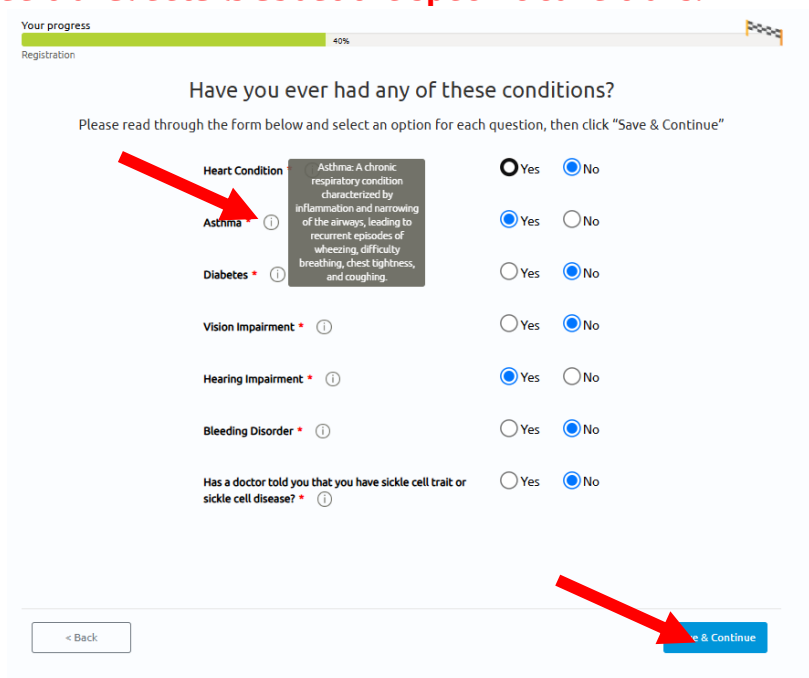
Cannot eat slugs

< Back Save & Continue

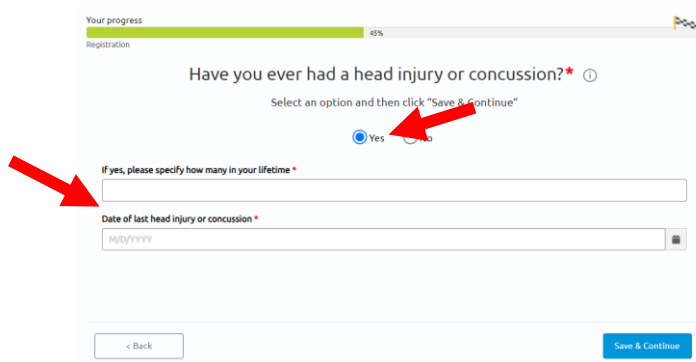
12. **Assistive Devices:** The same format as the previous question. Indicate Yes or No. If yes, explain in detail what the reason is. **NOTE: If a user attempts to Save & Continue without answering the question, the portal will provide a message indicating they need to answer before moving on.**




13. **Conditions:** This question, and the following question, contains Yes/No options to a series of conditions. The user should indicate whether the Athlete has these conditions or not. Answering Yes does not require any additional information to be provided. Click **"Save & Continue"** to move forward. **NOTE: Hovering over the Informational Bubble, noted by the Circle Icon with an "i" provides additional details about the specific conditions.**



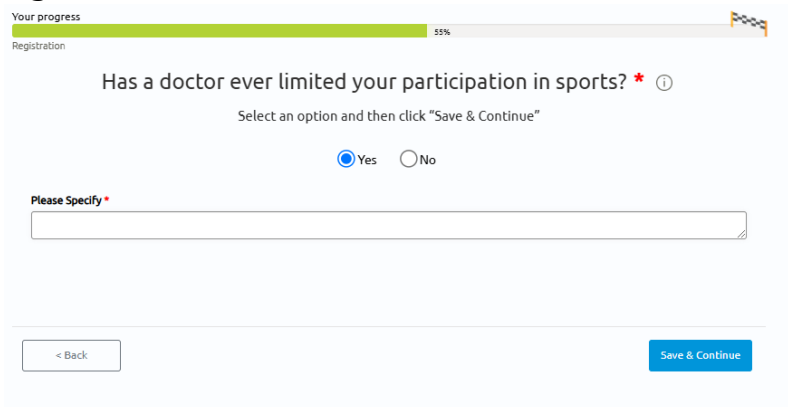
14. **Head Injuries & Concussions:** This question asks for information regarding previous head injuries or concussions. If a user indicates **“Yes”** they will be asked for more information about the number in a lifetime, and the date of the last head injury or concussion. Click **“Save & Continue”** to move forward.



15. **Allergies & EpiPen:** Another example of **“If Yes, then Explain”**. If a user selects **“Yes”** they will be given two additional fields to complete. A user can indicate applicable allergies by using the pre-populated options via the dropdown menu and then specify their allergy information in the box. It is required to Specify the allergy. Click **“Save & Continue”** to move forward.



16. **Sport Participation:** If a user has ever had their participation limited in a specific sport, they should indicate that sport and limitation in the available box after indicating “**Yes**”



Your progress  
Registration 55%

Has a doctor ever limited your participation in sports? \* ⓘ

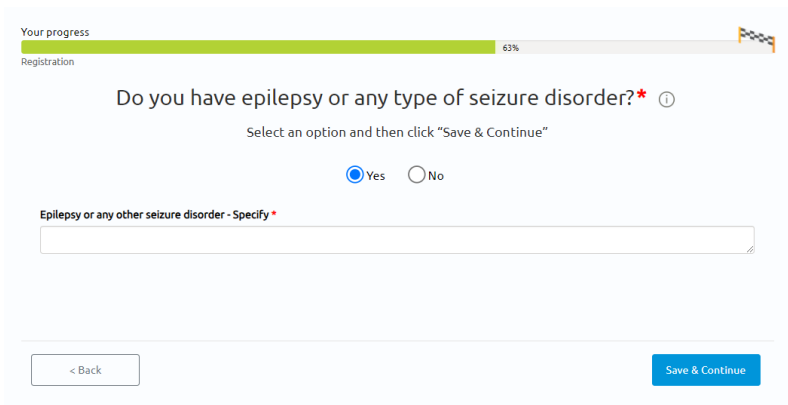
Select an option and then click "Save & Continue"

Yes  No

Please Specify \*

< Back Save & Continue

17. **Epilepsy:** Example of “**If Yes, Please Explain**” type question. Indicate answer and type relevant information into the box (if applicable). **Save & Continue** to move forward.



Your progress  
Registration 63%

Do you have epilepsy or any type of seizure disorder? \* ⓘ

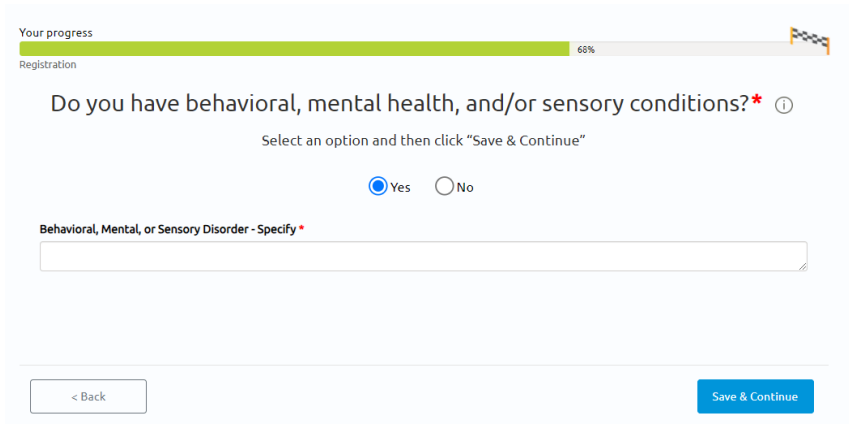
Select an option and then click "Save & Continue"

Yes  No

Epilepsy or any other seizure disorder - Specify \*

< Back Save & Continue

18. **Behavioral/Mental/Sensory Conditions:** Same format as previous question. If yes, indicate the condition. **Save & Continue** to move forward.



Your progress  
Registration 68%

Do you have behavioral, mental health, and/or sensory conditions? \* ⓘ

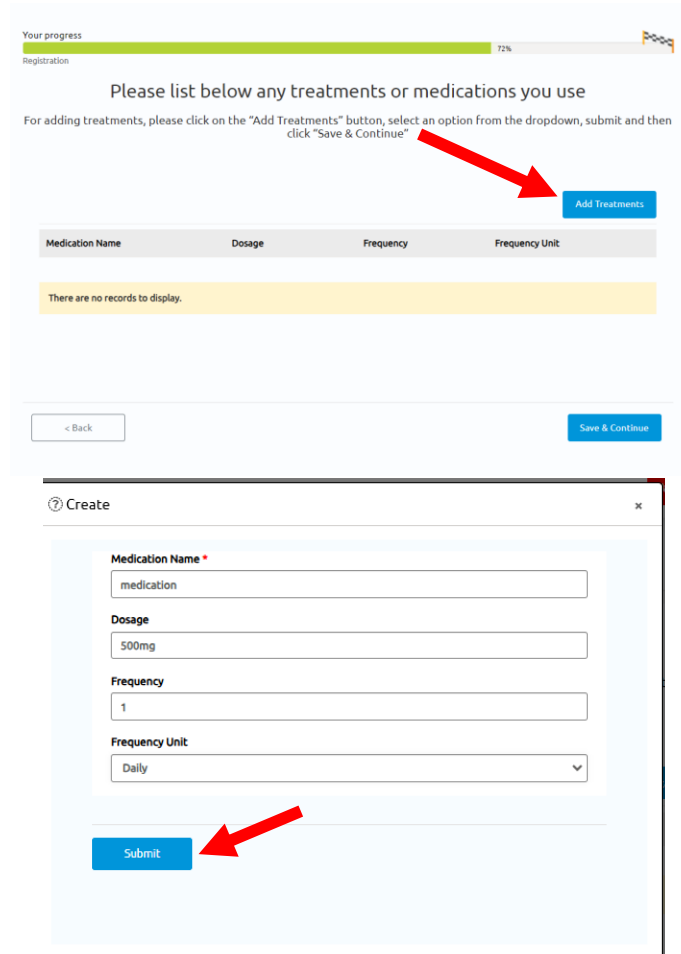
Select an option and then click "Save & Continue"

Yes  No

Behavioral, Mental, or Sensory Disorder - Specify \*

< Back Save & Continue

19. **Treatments & Medications:** This question allows the user to indicate any medications that the Athlete user takes, including the frequency & dosage of those medications. Click **"Add Treatments"**. In the pop-up, complete the relevant information regarding the medication/treatment then click **"Submit"**. Repeat the process for additional treatments. **Save & Continue** to move forward.



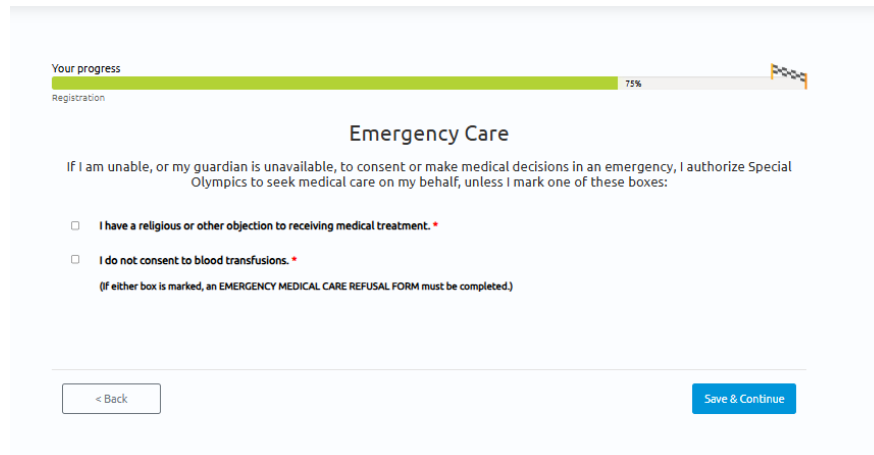
The screenshot shows a registration progress bar at 72% and a form titled "Please list below any treatments or medications you use". A red arrow points to the "Add Treatments" button. Below the button is a table with columns for Medication Name, Dosage, Frequency, and Frequency Unit. A message states "There are no records to display." At the bottom are "< Back" and "Save & Continue" buttons.

The "Create" pop-up form contains the following fields:

- Medication Name: medication
- Dosage: 500mg
- Frequency: 1
- Frequency Unit: Daily

A red arrow points to the "Submit" button at the bottom of the pop-up.

20. **Emergency Care:** These two questions refer to any religious or general objections towards receiving care in case of emergency. The user should only mark the boxes if they apply. **NOTE: If either box is marked an additional form will need to be completed and will populate in the checklist area once a SO staff has reviewed the Health History form. *Save & Continue* to move forward.**



Your progress  
Registration 75%

### Emergency Care

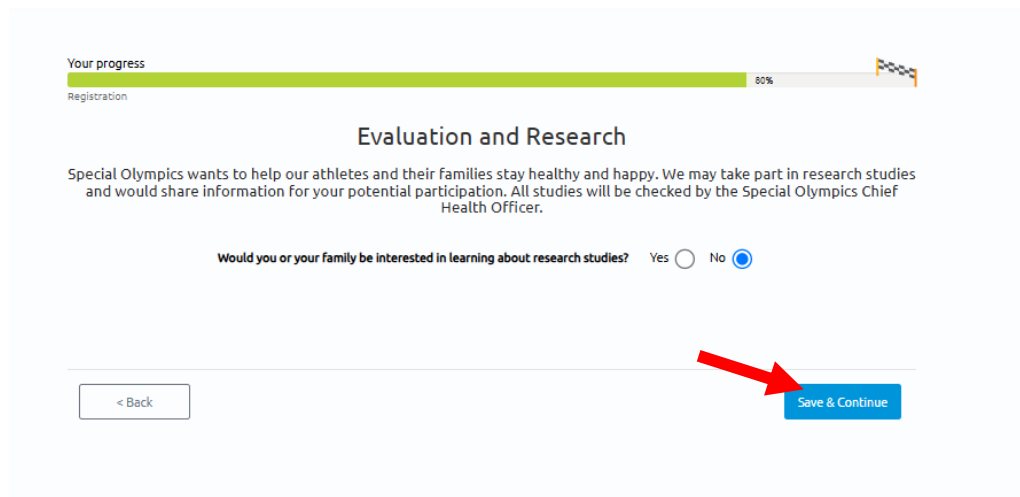
If I am unable, or my guardian is unavailable, to consent or make medical decisions in an emergency, I authorize Special Olympics to seek medical care on my behalf, unless I mark one of these boxes:

- I have a religious or other objection to receiving medical treatment. \*
- I do not consent to blood transfusions. \*

(If either box is marked, an EMERGENCY MEDICAL CARE REFUSAL FORM must be completed.)

< Back Save & Continue

21. **Evaluation and Research:** This is an opt-in question regarding sharing health information with other parties. The question is pre-filled to “**No**” and the user would need to indicate “**Yes**” to consent to the sharing of their personal information. ***Save & Continue*** to move forward.



Your progress  
Registration 80%

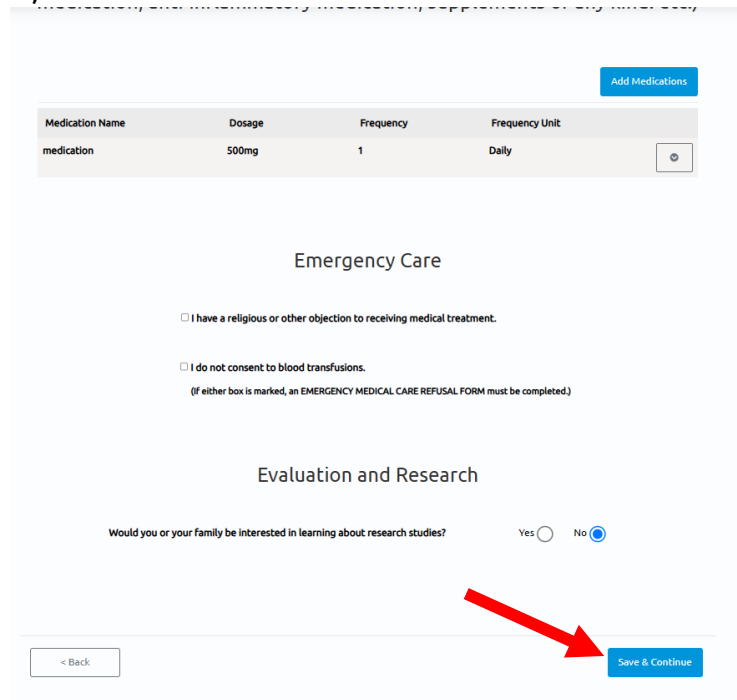
### Evaluation and Research

Special Olympics wants to help our athletes and their families stay healthy and happy. We may take part in research studies and would share information for your potential participation. All studies will be checked by the Special Olympics Chief Health Officer.

Would you or your family be interested in learning about research studies? Yes  No

< Back Save & Continue

22. This screen contains a summary view of all information the user has provided. The user will be able to update, change or remove information the was incorrectly input into the form. Once the user has confirmed the accuracy of the information, click **"Save & Continue"**



[Add Medications](#)

Medication Name	Dosage	Frequency	Frequency Unit
medication	500mg	1	Daily

**Emergency Care**

I have a religious or other objection to receiving medical treatment.

I do not consent to blood transfusions.  
(If either box is marked, an EMERGENCY MEDICAL CARE REFUSAL FORM must be completed.)

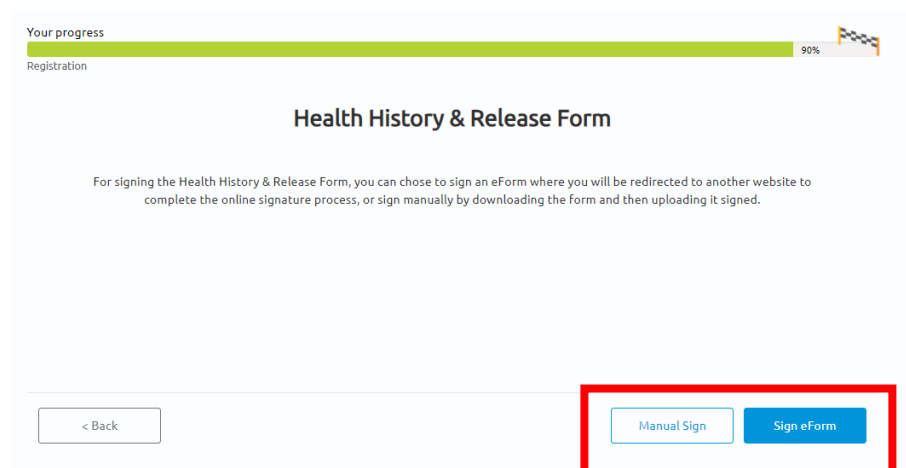
**Evaluation and Research**

Would you or your family be interested in learning about research studies?    Yes     No

[< Back](#)

[Save & Continue](#)

23. **Signing the Form:** To complete the process, the user will need to provide a signature, attesting to the information provided. There are two options for completing the signature form: Manual or eSign. **NOTE: For Athlete's over the age of 18 and are their own guardian, both options for Manual and eSign will need to be completed by the athlete user.**



Your progress  
Registration 90%

### Health History & Release Form

For signing the Health History & Release Form, you can chose to sign an eForm where you will be redirected to another website to complete the online signature process, or sign manually by downloading the form and then uploading it signed.

[< Back](#)




[Manual Sign](#)    [Sign eForm](#)

## Section F: Completing Signature Form Via Manual Sign:

1. The user will need to download the PDF document of their Health History, print the PDF, and then reupload the signed version of the form. Additional instructions are provided via the drop-down carrots on this screen. Click the **"Download Form"** button. This will generate a filled PDF of all information input on the portal. The user will need to print this document to complete.

Your progress  
Registration 94%

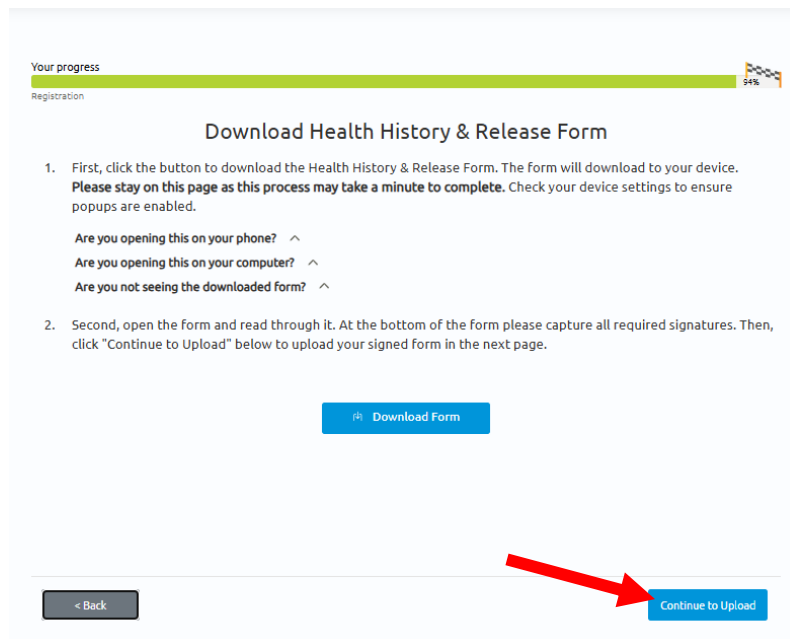
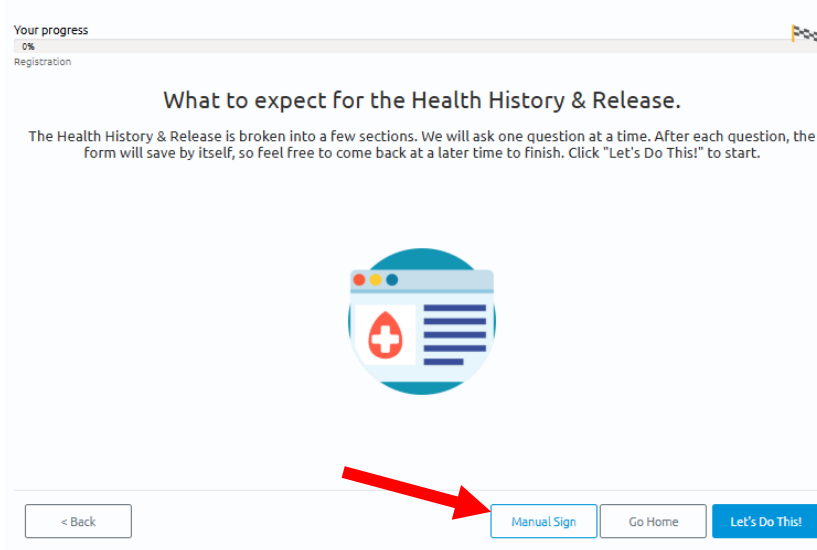
### Download Health History & Release Form

1. First, click the button to download the Health History & Release Form. The form will download to your device. **Please stay on this page as this process may take a minute to complete.** Check your device settings to ensure popups are enabled.
  - Are you opening this on your phone?**  The form will automatically download to your phone. To sign it, you may use an app on your phone (like Adobe Reader) or print the form.
  - Are you opening this on your computer?**  The form will automatically download in the current tab and to your downloads. To sign it, you may use an app on your computer (like Adobe Reader) or print the form.
  - Are you not seeing the downloaded form?**  If you do not see the download, it may be blocked by your popup blocker. Usually, you can click on the popup blocker icon in your browser's address bar to allow popups from this site.
2. Second, open the form and read through it. At the bottom of the form please capture all required signatures. Then, click "Continue to Upload" below to upload your signed form in the next page.

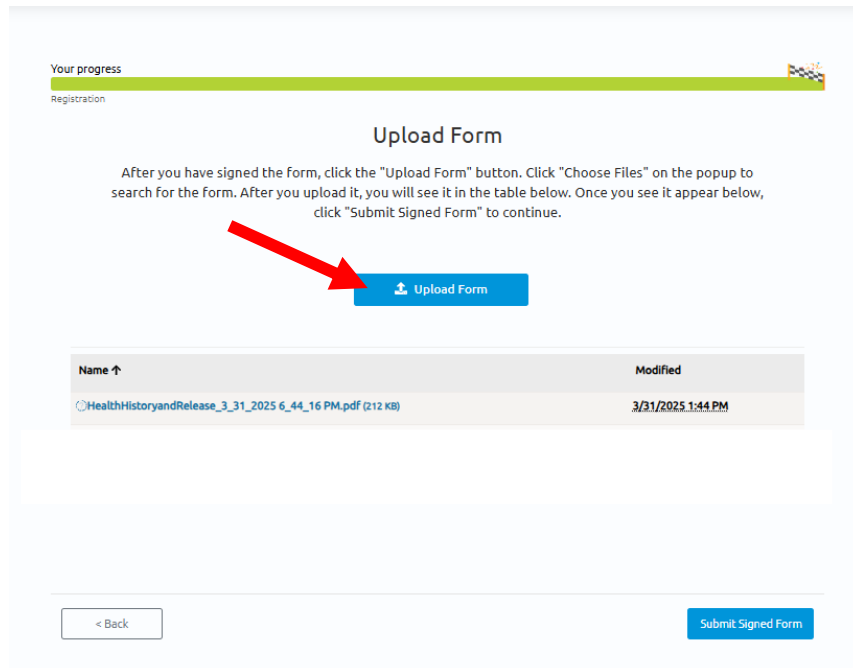
[\(1\) Download Form](#)

< Back [Continue to Upload](#)

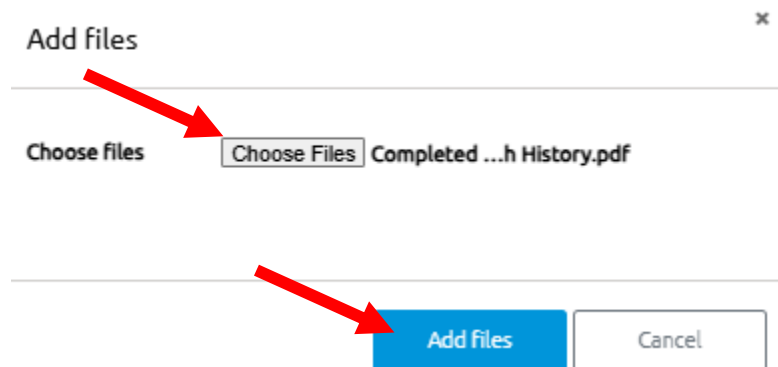
2. Once downloaded, printed and signed, the user should navigate back to the athlete's checklist, select "Edit Form" and when brought to the screen below select "Manual Sign" this will then take them to the correct page to "Continue to Upload"




- On this screen, the user will see the forms they have downloaded, and the option to "**Upload Form**". Click this button. **NOTE: If the user is on a computer, this will open the File Explorer, allowing the user to select the document from their documents. A user is also able to upload a .PNG/.JPEG image, which would be applicable for mobile users.**



- Add the relevant file for the Health History Form by selecting "**Choose Files**". Once selected, click "**Add Files**".



5. Click "**Submit Signed Form**" to submit the Document. **NOTE: Submitting a Manually Signed Form will require a SO Staff Member to review and update the status reason. This form will not be automatically approved.**



Your progress 

Registration

### Upload Form

After you have signed the form, click the "Upload Form" button. Click "Choose Files" on the popup to search for the form. After you upload it, you will see it in the table below. Once you see it appear below, click "Submit Signed Form" to continue.

[Upload Form](#)

Name ↑	Modified
 Completed Signed Health History.pdf (268 KB)	3/31/2025 1:51 PM
 HealthHistoryandRelease_3_31_2025 6_44_16 PM.pdf (212 KB)	3/31/2025 1:44 PM

[< Back](#) [Submit Signed Form](#)

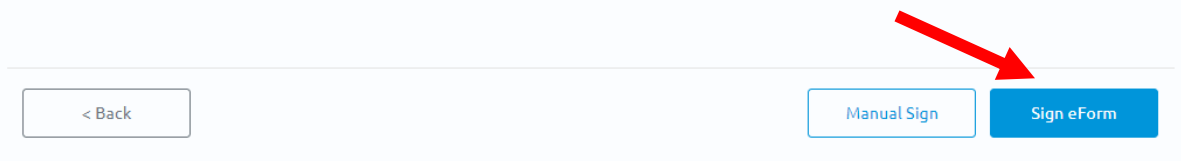
## Section G: Completing Signature Form via ESign

1. **Completing via eSign:** If a user elects to complete the signature form via eSign, click the **"Sign eForm"** button.

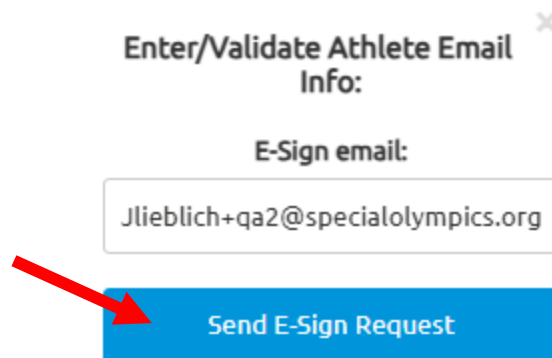


### Health History & Release Form

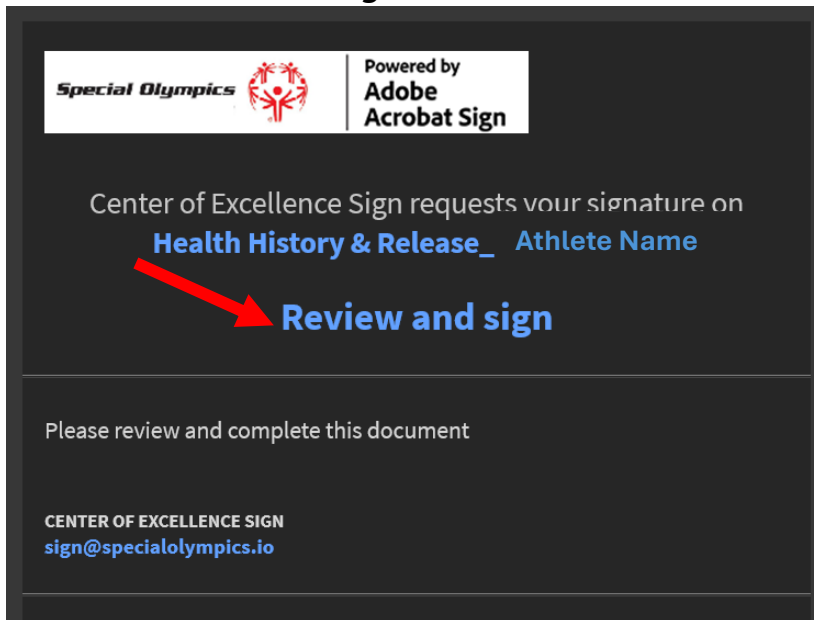
For signing the Health History & Release Form, you can chose to sign an eForm where you will be redirected to another website to complete the online signature process, or sign manually by downloading the form and then uploading it signed.



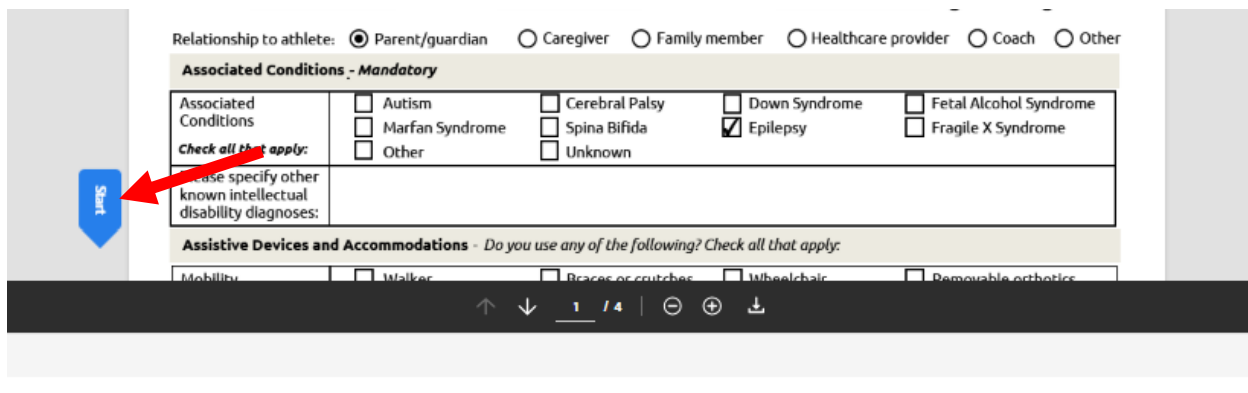
2. **If the user is Over 18:** If the Athlete user is over the age of 18 and their own guardian, the Athlete must complete the signature form. When clicking **"Sign eForm"** a pop-up will appear, pre-populated with the Athlete email previously indicated during the account creation process. Verify or update the email address, then click **"Send E-Sign Request"**



- The Athlete user will receive an email from **Center of Excellence Sign via Adobe Acrobat Sign**, indicating they have a form to complete. In the email, the Athlete user must click "**Review & Sign**"



- Clicking this link will open the PDF signature document in the user's default browser. The steps for completion are indicated by Blue Arrows, walking the user through completing the signature document.



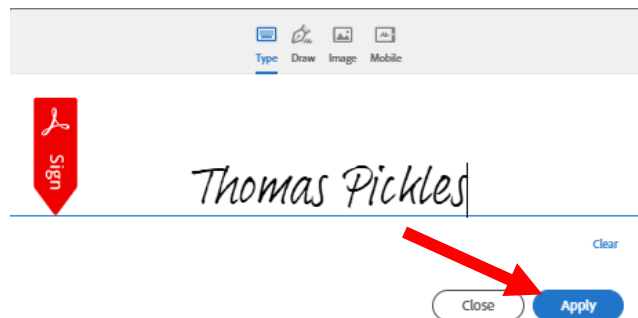
5. Follow the on-screen directions indicated by the Blue Arrows. Depending on a few factors the first box will prepopulate to either "Athlete" or "Guardian".
  - a. Always double check the signature box is populating in the correct line. If athlete is own guardian the signature will be in the "Athlete Signature" if Guardian needs to sign it should be yellow under "Parent/Guardian Signature".



A screenshot of a registration form. On the left, a blue arrow labeled "Next" points to the form. The form contains the following fields and instructions:

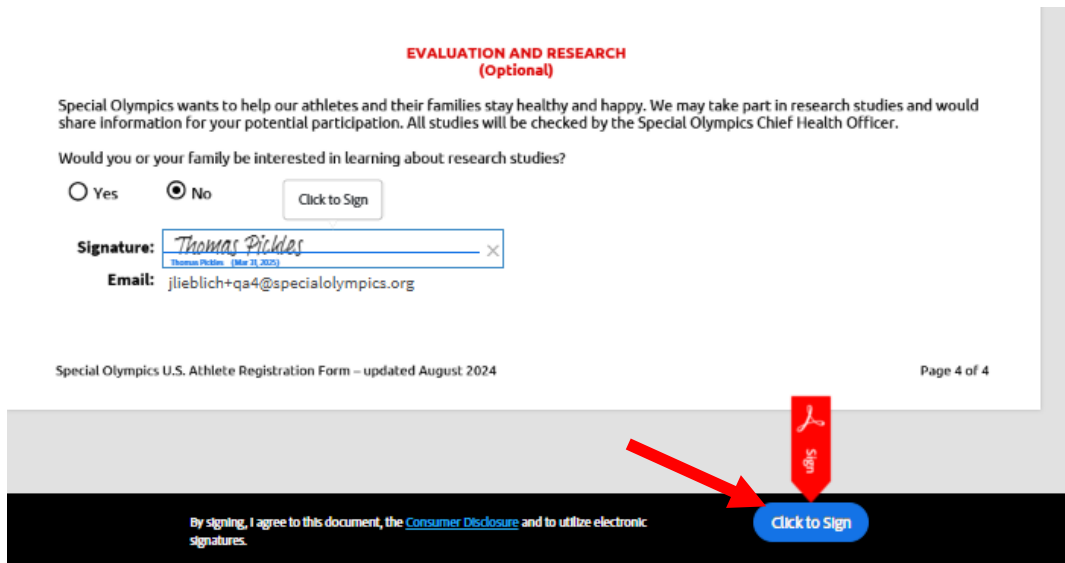
- Athlete Name: Tommy Pickles
- Athlete: A dropdown menu with "Athlete" selected. A red arrow points to this dropdown.
- ATHLETE SIGNATURE**  
(required for adult athlete with capacity to sign legal documents)
- I have read and understand this form. If I have questions, I will ask. By signing, I agree to this form.
- Athlete Signature: A yellow box with the text "Click here to sign". A red arrow points to this box.
- Date (dd/mm/yyyy): 31 / Mar / 2025
- PARENT/GUARDIAN SIGNATURE**  
(required for athlete who is a minor or lacks capacity to sign legal documents)
- I am a parent or guardian of the athlete. I have read and understand this form and have explained the contents to the athlete as appropriate. By signing, I agree to this form on my own behalf and on behalf of the athlete.
- Parent/Guardian Signature: \_\_\_\_\_ Date (dd/mm/yyyy): \_\_\_\_ / \_\_\_\_ / \_\_\_\_
- Printed Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

6. Follow the on-screen directions indicated by the Blue Arrows. Where applicable signatures are required, click on the signature box. The Athlete user should type their full name into the pop-up box, then click "**Apply**"



A screenshot of a signature pop-up box. At the top, there are icons for "Type", "Draw", "Image", and "Mobile". Below these is a red "Sign" button. The signature "Thomas Pickles" is written in a cursive font. At the bottom right, there are two buttons: "Close" and "Apply". A red arrow points to the "Apply" button.

- Once all signature fields have been completed, click “**Click to Sign**” at the bottom of the PDF page to submit the signature document.



**EVALUATION AND RESEARCH  
(Optional)**

Special Olympics wants to help our athletes and their families stay healthy and happy. We may take part in research studies and would share information for your potential participation. All studies will be checked by the Special Olympics Chief Health Officer.

Would you or your family be interested in learning about research studies?

Yes     No   

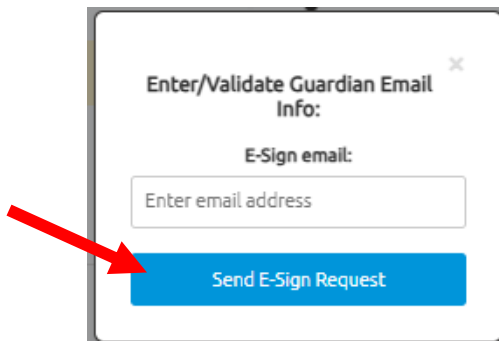
**Signature:**  Thomas Pickles (Mar 21, 2024)

**Email:**

Special Olympics U.S. Athlete Registration Form – updated August 2024 Page 4 of 4

By signing, I agree to this document, the [Consumer Disclosure](#) and to utilize electronic signatures.

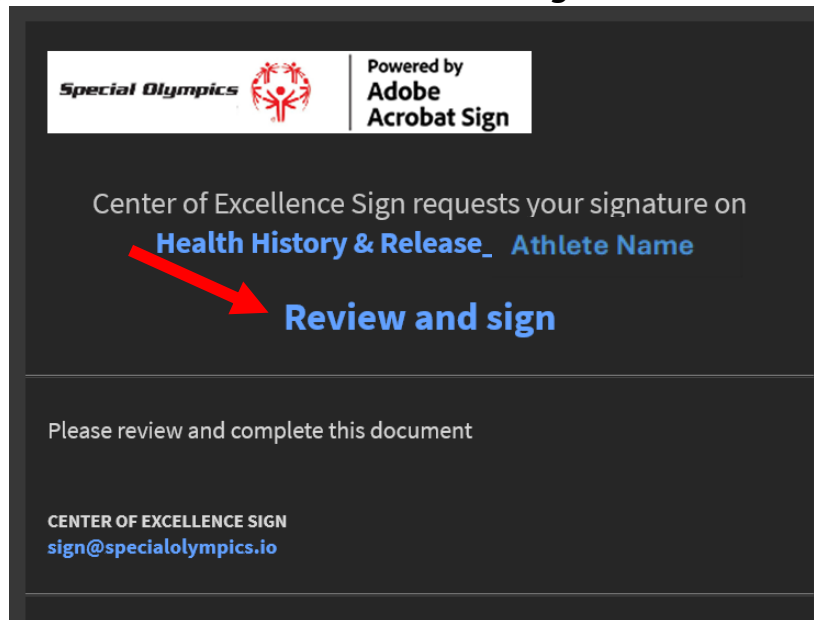
- Once signed, the user should see a confirmation screen indicating that they are all set and have completed the process. The user will receive an email copy of the form they have signed, and the status of the form will be updated in the Register Portal via the “**Go to Checklist**” button. **NOTE: Depending on the Programs requirements, an esigned document may or may not be automatically approved in the system and may require a staff member to approve.**
- If the user is Under 18 OR not their own guardian:** If the Athlete user is under the age of 18 or is not their own guardian, the Parent/Guardian must complete the signature form. When clicking “**Sign eForm**” a pop-up will appear, pre-populated with the Parent/Guardian email previously indicated during the account creation process. Verify or update the email address, then click “**Send E-Sign Request**”



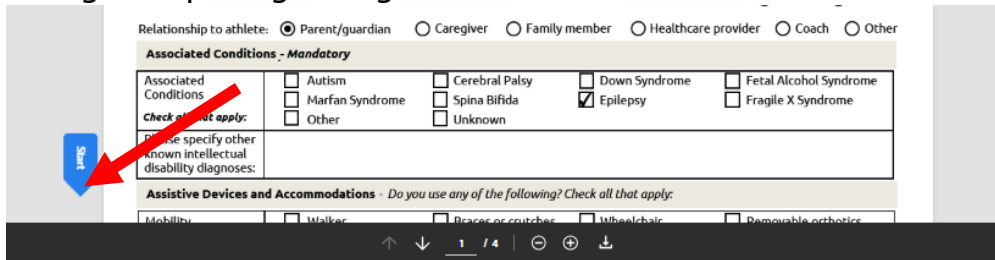
Enter/Validate Guardian Email Info: ×

E-Sign email:

10. The Parent/Guardian user will receive an email from **Center of Excellence Sign via Adobe Acrobat Sign**, indicating they have a form to complete. In the email, the Parent/Guardian user must click "**Review & Sign**"



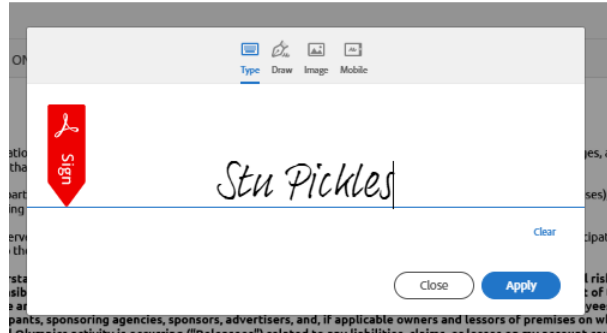
11. Clicking this link will open the PDF signature document in the user's default browser. The steps for completion are indicated by Blue Arrows, walking the user through completing the signature document.



12. Double check the signature person is correct. Make sure that this box reads **Guardian**. You will be able to tell if is not correct if the yellow "click here to sign" is not in the Parent/Guardian Signature section.



13. Follow the on-screen directions indicated by the Blue Arrows. Where applicable signatures are required, click on the signature box. The Parent/Guardian user should type their full name into the pop-up box, then click "**Apply**"



14. Once all signature fields have been completed, click "**Click to Sign**" at the bottom of the PDF page to submit the signature document.

**EVALUATION AND RESEARCH**  
(Optional)

Special Olympics wants to help our athletes and their families stay healthy and happy. We may take part in research studies and would share information for your potential participation. All studies will be checked by the Special Olympics Chief Health Officer.

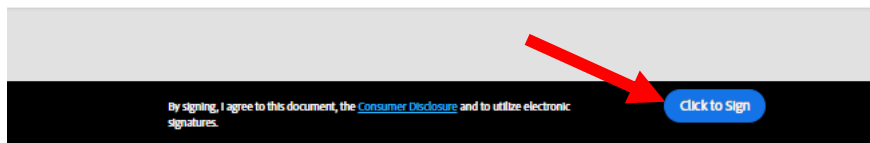
Would you or your family be interested in learning about research studies?

Yes  No

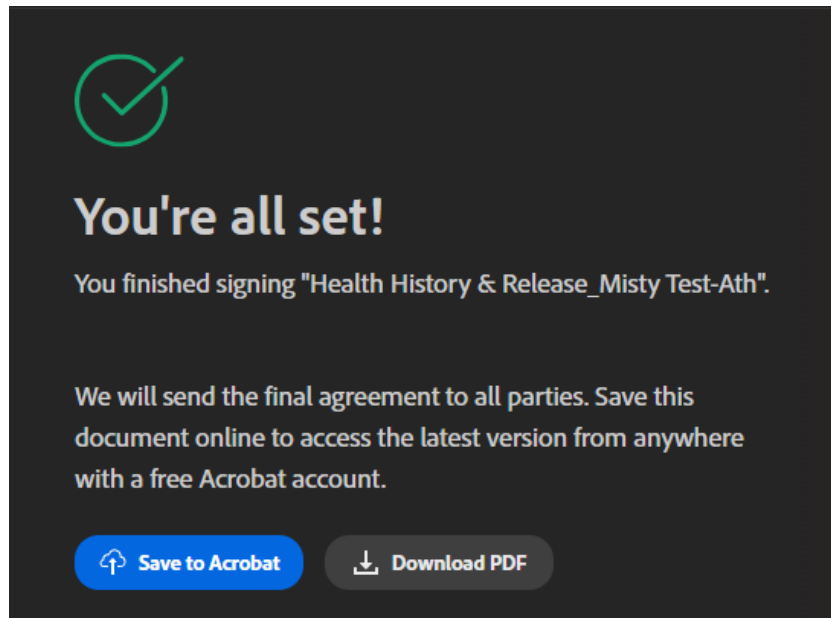
Signature: Stu Pickles

Stu Pickles (Mar 21, 2025)

Email: jlieblich+qa4@specialolympics.org



15. Once signed, the user should see a confirmation screen indicating that they are all set and have completed the process. The user will receive an email copy of the form they have signed, and the status of the form will be updated in the Register Portal via the "**Go to Checklist**" button. **NOTE: Depending on the Programs requirements, an esigned document may or may not be automatically approved in the system and may require a staff member to approve.**



This concludes with the Parent/Guardian/Family Portal User guide. Thank you for taking the time to familiarize yourself with the Parent/Guardian/Family Portal. We appreciate your dedication in ensuring a smooth and efficient experience for our athletes. Should you need further assistance or wish to explore more about the portal, please refer to the additional resources section below.

## **Helpful Links & Resources:**

[Sandbox/UAT Portal](#)

[Sandbox/UAT Dynamics \(Backend\)](#)

[Production/Live Portal](#)

[Production/Live Dynamics \(Backend\)](#)

[COE HelpDesk](#)

[COE Sharepoint Resource Page](#)

[Video Library](#)

[Userguide Library](#)

[One Pager Library](#)

[Glossary Library](#)

[FAQ Library](#)