Step by Step Guide to Getting Started

A step by step guide for your Training Center to get you started with a Checklick account and license our Programs

Introduction

For our development programs, we've chosen to use Checklick, an Athlete Development Tracking System (ADTS™). The system allows us to centralize our Athlete Development Programs and provides training centers, coaches and athletes a tool to manage and track all athlete development progress.

The guide will cover the 5 Steps to getting started along with key functionality to help you get the most of the system.

The following will be covered in this guide:

STEP 1: Create an Organization

Creating your Organization page is your first step in getting set up with an account. By creating an organization account, you will be able to create and license our program checklists, create evaluator accounts (coaches/instructors), add people and evaluate them using checklists.

To create an organization account, go to *sailcanada.checklick.com* and follow the steps in the help article Make and Account for your Organization.

STEP 2: Login

Once you've created your organization in Checklick, you'll be able to sign in to manage your organization. To log in, go to *yourorganization.checklick.com* and enter your username and password.

STEP 3: License our programs

Once you've logged in, you'll want to license out our programs so you can then add people to your People page and evaluate them using our programs.

To license a checklist, follow these steps in the help article Licensing a Checklist.

You'll notice that the checklist will contain licensing terms and pricing for use of the checklists. Make sure you read them over prior to requesting a license.

STEP 4: Add Evaluators (Coaches/Instructors)

After you've licensed our programs, you'll want to add evaluators. Evaluators are people who will be able to log into their own accounts and evaluate the people you'll add to your Organization.

Go to help article Adding Evaluators (Coaches or Instructors) to add People with evaluator privileges.

STEP 5: Add People

There are different ways of adding people into Checklick and once people are added to your People page, you'll be able to evaluate them using the checklist that you've licensed.

Note the various ways in which people can be entered:

- Adding People or Students
- Import A Spreadsheet of People
- People create their own account by going to yourorganization.checklick.com
- If you are using Checklick Storefront, people who register for your courses are automatically added to your people page so you can evaluate them

Evaluate People (Athletes)

Assuming you've taken the 5 steps to get started, you're ready to experience the biggest benefit of the system which is being able to evaluate people's progress through our programs.

Before you start evaluating people, verify that you've licensed our program checklists. You can do this by logging in, going to the People page and to the right of person's name, you should see each one of the program checklists you've licensed.

Once you've verified that you've licensed our programs, you can begin by:

- Evaluating People one by one or;
- Evaluating Groups of People

Communicating Progress

Evaluation progress is tracked in the form of checklists and certificates. Any person added to Checklick has their own unique username and password, which allows them to log in and see their own progress.

However, you may choose to send out updates directly from your account where you can email people or call them directly from your Checklick account. Here's how:

- [Emailing and Calling People from Checklick](#) or;
- [Emailing Groups of People](#)

Downloading Checklists and Certificates

Once you perform and save an evaluation on a person, you then have the ability to download and print out PDF checklists and PDF certificates.

A **PDF Checklist** is a PDF document with the checklist contents and evaluations for a particular person, which can be printed or emailed to the person.

A **PDF Certificate** is a PDF document that represents the person's achievement of a particular level in a checklist. You may wish to print these out on quality paper and hand them out to the person once they achieve a level.

The help article [Downloading checklist PDFs and certificate PDFs](#) contains steps on how to download both PDFs.

Viewing Participant Data

The **Evaluated People** insight gives you a way of seeing who is being evaluated using our program checklists.

When you first load the **Insights** page, you'll see a collapsed view of the **Evaluated People** insight. Clicking the plus button on the top right will expand the insight into a large graph view.

Instructions on utilizing the Evaluated People insights are detailed in the [Insight: Evaluated People](#) help article.

Resetting Passwords

Resetting your password can be accomplished by going to (organization.checklick.com).

Additionally, as a training center manager, people may request that you reset their password. Not to worry, there are a few ways to do that and some are as easy as pointing people to the reset password link.

The help article, [Resetting Passwords](#) outlines the various ways in which password can be reset.

Help Resources

It's important to make a distinction between technical feedback/support and curriculum feedback/support.

Program Curriculum Support/Feedback

For support and feedback regarding our **program curriculum**, please contact:

Sail Canada Programs
613 545 3044
programs@sailing.ca

Technical Feedback/Support

If you have any support inquiries on how to use the system or, there are a number of resources to ensure you're fully supported.

Help Center:
If you're having trouble with functionality and would like to learn more about various functions of the system, the first place for help resources is the Help Centre. The help article linked in this

guide have all been pulled directly from the Help Centre which can be accessed at
https://help.checklick.com/.

Checklick Support:
If you can't quite find what you're looking for or you're just having trouble executing the steps
outlined in the help article, Checklick provides support 7 days a week.

You can contact Checklick support at (support@checklick.com).