# Welcome to PactSafe!

We've partnered with Indiana Swimming to help your swim club open up to get kids back in the water, while helping keep your club protected. A big part of that is making sure that your club members are signing waivers that hold your club harmless.

In this document, you will find instructions and videos tailored for you to launch a "1-click waiver" quickly and easily with PactSafe.

If you can't find the answer you are looking for there, feel free to send an email to service@pactsafe.com and one of our team members will reach out.
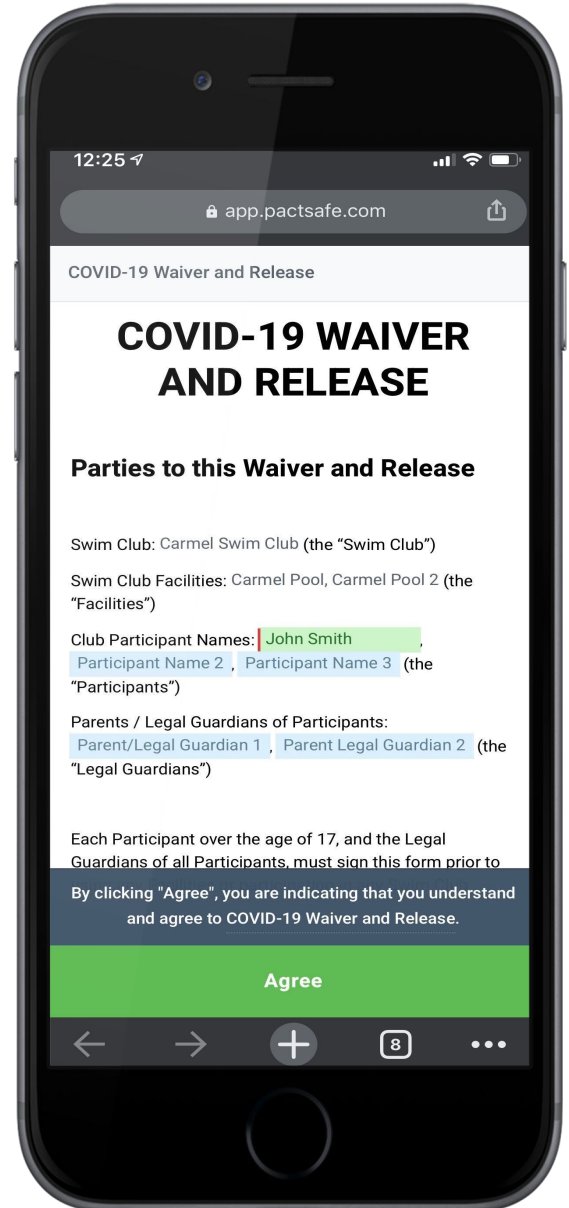
The PactSafe Team

# Overview

## What is PactSafe?
PactSafe is an online tool that allows you to easily get contracts signed with a single click.

## What is a SmartPact?
A SmartPact is the part of PactSafe that you will be using to create 1-click Waivers.

Once you go through the steps included in this guide, you'll have a simple waiver that your club members can click to accept right from their computer of phone.

# Log In

To get started, the individual who will serve as Admin on your PactSafe account should be the one to first log into the system.

They will receive an email sent from notifications@pactsafe.com to the email that they have provided the PactSafe team.

If for some reason you do not get this email or you are having trouble accessing your account, please enter this URL, replacing the jane.doe@gmail with the email you provided PactSafe.

Don't forget to bookmark PactSafe for easy access!

# Publishing Your 1-Click Waiver

Before you get started, you will want to update your COVID-19 Waiver and Release Template to reflect your club's information.  Follow the steps below:

1. Inside the Contracts 🗎 section of PactSafe, locate the COVID-19 Waiver and Release and select the blue 'Edit Draft' button

2. Hover over the  'Publish' at the top of the screen and select "Publish Now" from the drop down options.  The video below ([also at this link](#)) shows how to do this:
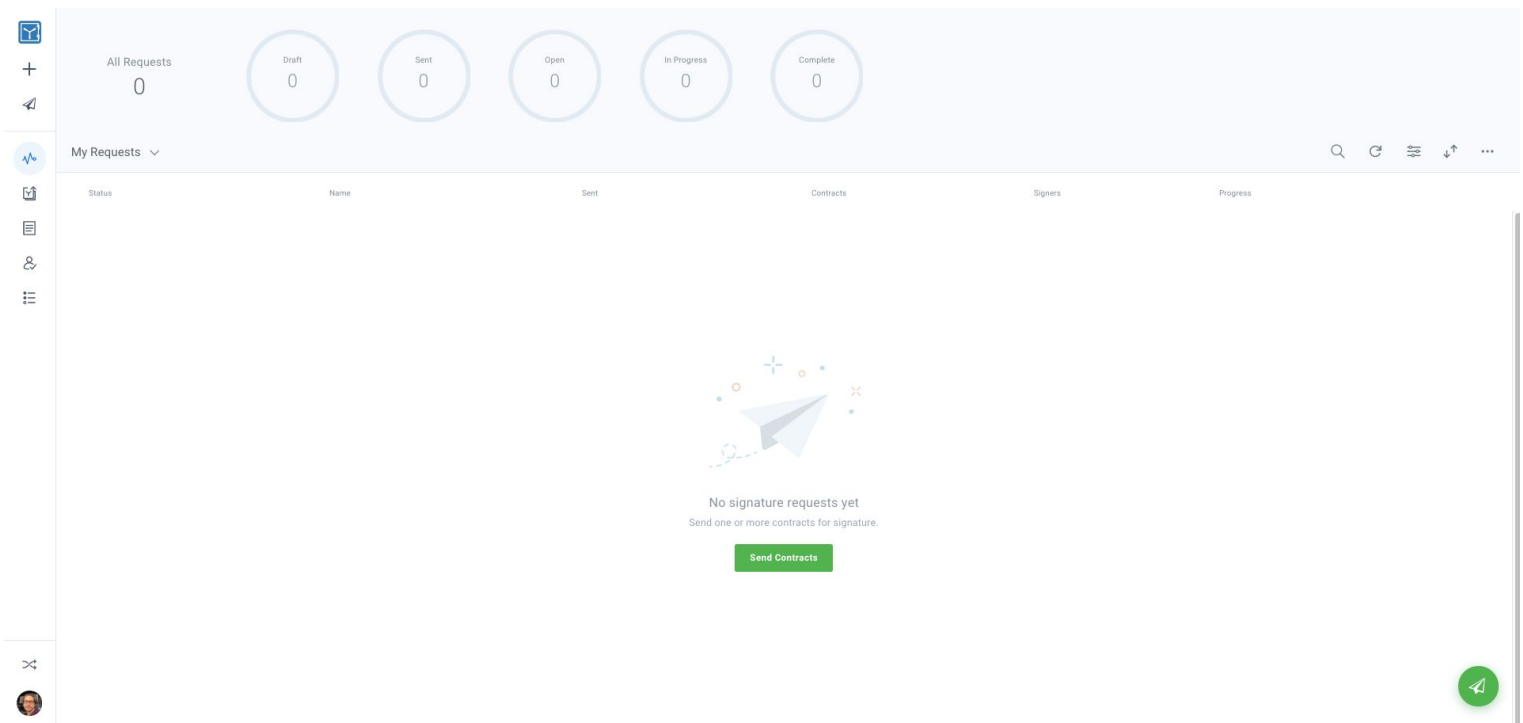


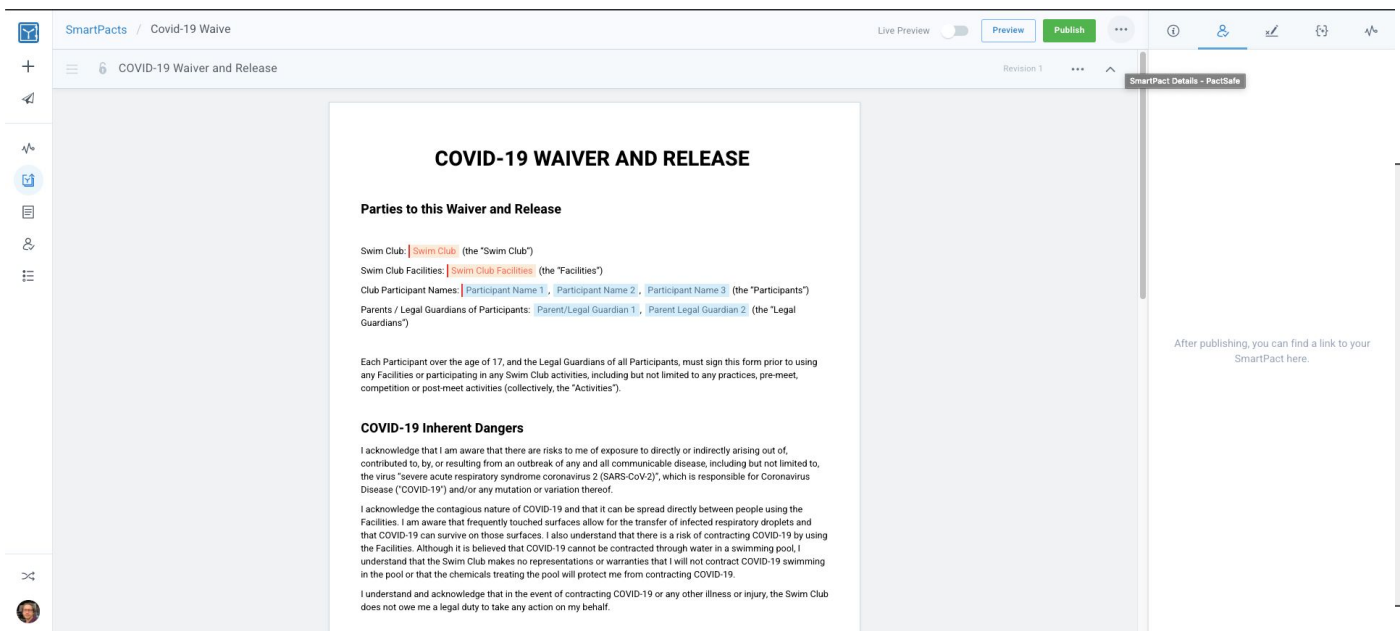Video showing steps 1-2 above

3. Navigate to the "SmartPacts" section of PactSafe

4. Select Publish Contracts, or click the Green + on the bottom right, then click 'Select an existing contract'

5. Select your COVID-19 Waiver and Release and click 'Finish' in the upper right corner.

6. Name your SmartPact in the upper left box.  Consider something like "COVID-19 Waiver."
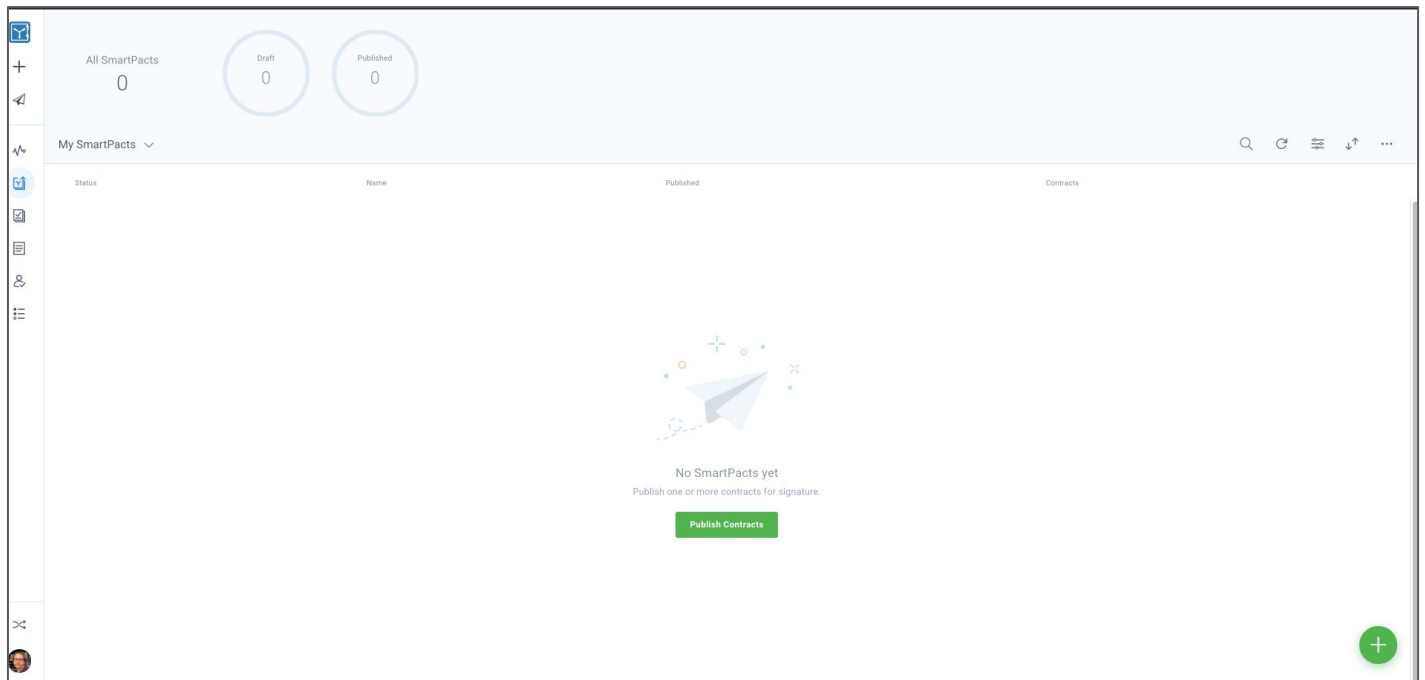


Video showing steps 3-6 above

7. Click on the Orange "Swim Club" field

8. Type in your Swim Club Name, then click "Done"

9. Click on the "Orange Swim Club Facilities" field.

10. Type in the Facilities your Club uses, then click "Done"

11. Click the Green "Publish" button

12. Click the Signers Button on the top right &

13. A link will be generated and appear in the right side panel. You can shorten the link by clicking 'Shorten URL'. This is the link you'll send to your club members to sign your 1-click waiver.



Video showing steps 7-13 above

# Turn your 1-Click Waiver into a QR Code

You can follow the instructions below to create a QR code that can be posted on-site to allow visitors to access your COVID-19 Waiver and Release without having to send a link.
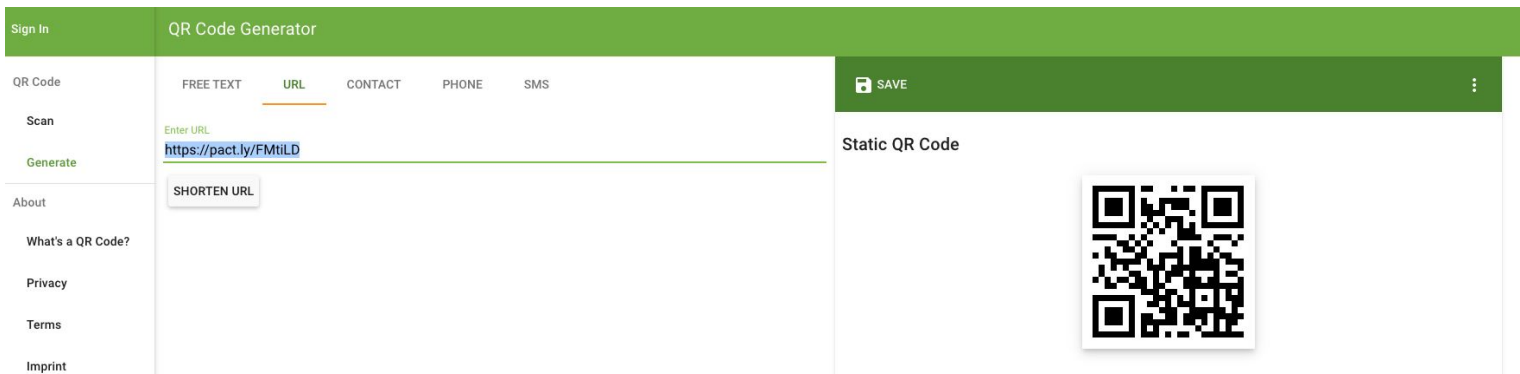


**WORKFLOW STEPS:**

1. Once you have created your SmartPact, click shorten URL and copy the link
2. Open https://www.the-qrcode-generator.com/
3. Select the URL section in the top menu
4. Paste your copied link in the paste URL field
5. Click the Save button above the QR code on the right side
   a. This will download the QR code image file
6. You can print the QR Code and display in a convenient place for people to scan

**ACCESSING A SMARTPACT FROM A QR CODE**

To access the COVID-19 Waiver and Release from the QR code, you will need to go to the camera on your smartphone. Put the QR code in the view of the camera, and then click the link that appears at the top, and voila!
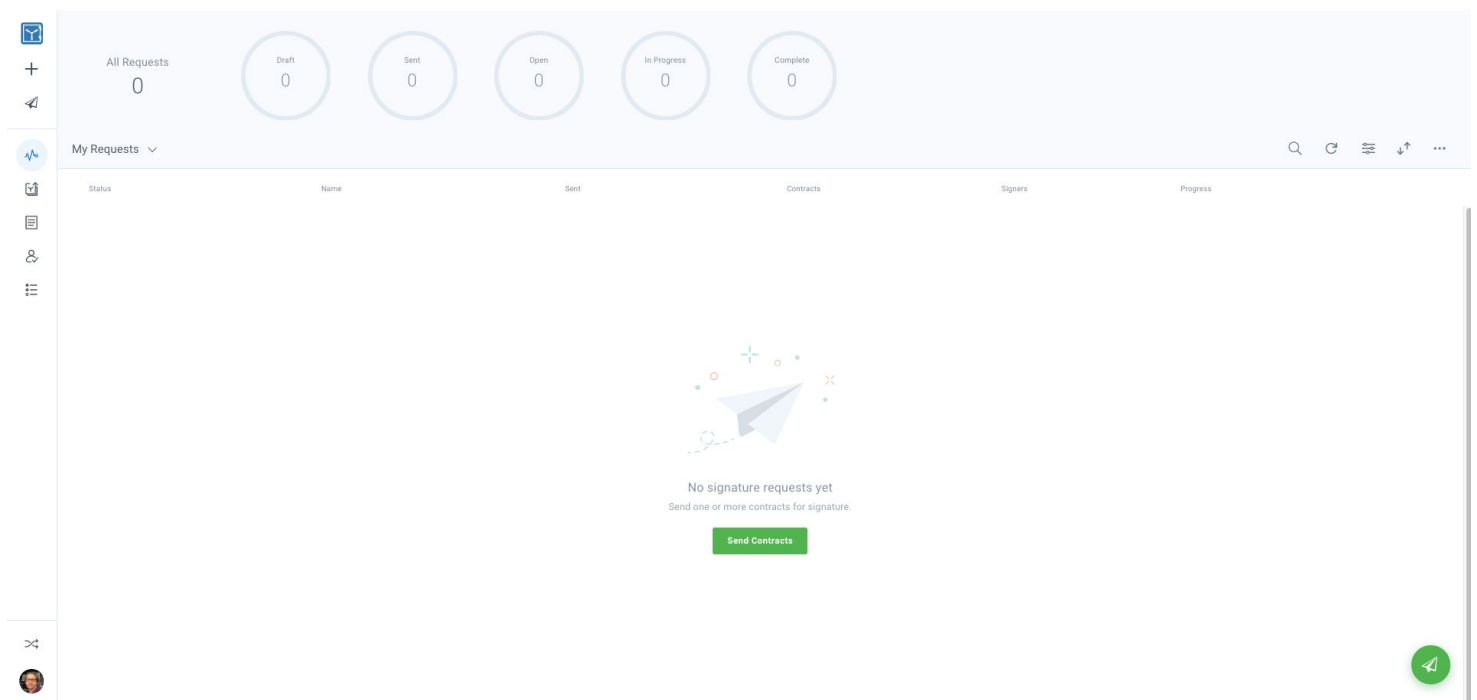
# How to View Who Had Signed your 1-click Waiver

**View All Signers**
1. Select the Signers icon on the left hand menu
2. In the upper right hand of the screen, click the filter icon
3. Under 'Filter by Activity' select 'Has Activity Type'
4. Click on the 'Any Type' dropdown and select Agreed
5. Click Apply at the bottom of the screen
6. This filter will stay in place until you navigate away from the Signers view, or reset the filter

**Find a Specific Signer**
1. Select the Signers icon on the left hand menu
2. In the upper right hand of the screen, click the magnifying glass
3. Type in the name or email of the Signer you are looking for
4. Press enter

Video of the steps listed above.

# How to Export Who Had Signed your 1-click Waiver

**Export Information**
1. Select the Activity icon on the left hand menu
2. Hover over the ellipse menu in the top right hand corner and select Export
3. Select participant_name_1 and Parentlega_guardian_1 from the custom data column
4. Select Export
5. You will receive an email with a .csv file that you can open with Excel or Google Sheets

If using information in this format to verify that your participants have completed waivers, you will want to be sure to filter your list in Excel to event type = agreed.
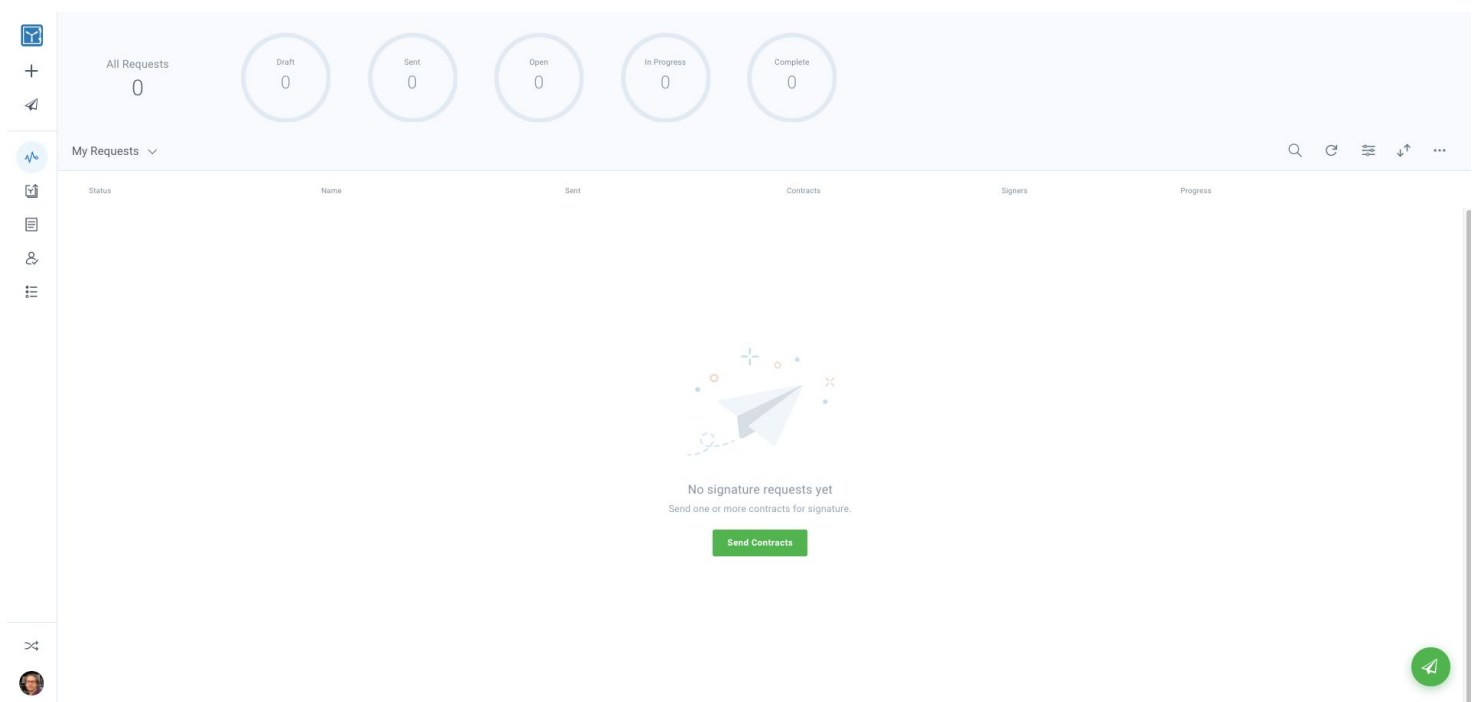


Video of the steps listed above.

# FAQ

**Q: I'm trying to Publish the waiver but I do not see it - where can I find it?**

*A: Please make sure your view is set to "Everyone's Contracts". You can do this by going to the top left of the screen and clicking the dropdown next to "My Contracts" and selecting "Everyone's Contracts".*

**Q: I do not see the waiver when I'm trying to create a 1-click waiver- where can I find it?**

*A: Please make sure your view is set to "Everyone's Contracts". You can do this by going to the top left of the screen and clicking the dropdown next to "My Contracts" and selecting "Everyone's Contracts".*

**Q: I'm trying to input my Club's information but it doesn't show up when I create my 1-click waiver**

*A: Once you add your Club's name to the waiver, click the Green Done button to save your changes*

**Q: How will my participants know if they have completed the 1-click waiver?**

*A: Once a participant or parent/guardian has completed the 1-click waiver they will receive an email confirmation*

**Q: Do I get a notification when participants complete the waiver?**

*A: Email notifications to Clubs are not automatically generated for the 1-click waiver. If you would like to be notified every time it is completed you can add yourself as a follower. Here is a video on how to add yourself as a follower.*