

## Special Olympics Clubs | Getting Started with Sporty SuperCRM

### Introduction

This Guide aims to support Clubs to get started with the basic Sporty SuperCRM functionality that will support their operations.

As you grow your use of Sporty, there will be other functionality that you may wish to utilise. There are [comprehensive guides & instructions](#) within the Sporty platform to support this. In addition and as we increase the use of Sporty within and across Special Olympics, we will continue to share and guide on how you can best utilise its different features.

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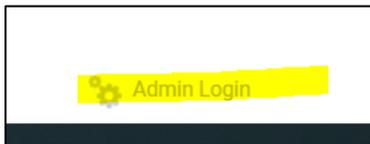
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### 1. SONZ Summary

- Sporty holds all our information on athletes and volunteers. Sporty shares the athlete information with GMS, so it is important that Sporty has the most up to date information.
- All athlete and volunteer information is stored within each Club’s SuperCRM in Sporty (i.e. Southland, Mid-Canterbury, Kapiti etc).
- SONZ has visibility of the national database; Clubs have visibility of their respective athlete/volunteer databases.
- All athlete and volunteer information has been transferred from GMS. If there is information missing, we want to work together to fill in this information. Clubs are able to update and edit most of this information directly in Sporty.
- Athletes’ medical expiry dates are visible, but the PDF of the Medical Certificates were unable to be transferred out of GMS.
- Clubs can choose to upload medical certificates to their athletes’ profiles or wait until a renewal is needed.
- Any athletes who have renewed their Medical through the new Sporty registrations has the PDF of their Medical Certificate visible to Clubs in the CRM.

## 2. CRM Access - Logging in

- Clubs are each entitled to 2 x logins to utilise the CRM functionality of Sporty
- (Note – Clubs are able to allocate other users with fewer permissions which we can support with in due course)
- To login, you will be provided the URL to their Sporty site and your login details
- Note: this site can be created into a club website in the future, if this is something clubs wish to pursue
- The login button is on the bottom right corner of the page

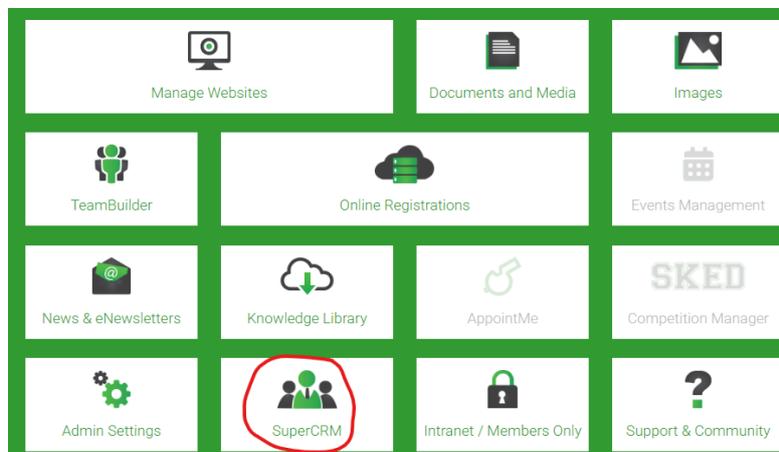


### First To-Dos

- Bookmark the Sporty site for easy future access
- Give login access to your second CRM user if needed, by [following these instructions](#)
- Set the 'From' email address to a club contact (e.g. otago@specialolympics.org.nz), so that when a form is completed by an athlete/volunteer, the confirmation email appears to come from this address, by [following these instructions](#)

## 3. Where Information Lives

- This Dashboard is like your home screen. The key component you will utilise in the first instance is the SuperCRM



- When you first click on SuperCRM, a full list of all your members (athletes & volunteers) will display

Photo	Person ID	Name	DoB	Gender	Medical Expiry Date
	[Redacted]	[Redacted]	[Redacted]	Male	16/03/2025
	[Redacted]	[Redacted]	[Redacted]	Male	18/11/2025
	[Redacted]	[Redacted]	[Redacted]	Female	14/03/2028
	[Redacted]	[Redacted]	[Redacted]	Male	31/03/2025

- Click on an individual profile to view that person’s detailed information

**Profile** | Timeline | **Registrations** | Relationships | Financial | Audit

**[Redacted Name]**

Do Not Email

Date of Birth: [Redacted] | Email: [Redacted]

Street Address: [Redacted] | Town/City: Wellington

Country: New Zealand |  Use this for Postal Address

Phone 1: [Redacted] | Phone 2: [Redacted]

Primary Ethnicity: NZ European | Gender: Male

Organisations: Special Olympics Te Whanganui-a-Tara

Tags: [Redacted]

- Within each profile is a record of that person’s registrations with SONZ, and over time, any communications the Club sends out of Sporty
- The information gathered via the Registration Form is stored in the ‘Registrations’ tab. Click on the green magnifying glass to open up a copy of the form.

SP Reference	Date	Year	Organisation	Form	Grade	Team	Roles
SP8742910	01/01/2024	2024	Special Olympics Te Whanganui-a-Tara	Athlete Registration			Participant

- Once opened, you can see all the data entered into the Registration Form under the various headings.

- A volunteer’s Police Vetting expiry date is located here:

**Volunteer and Unified Partner Registration**

Role

Volunteer Role

Other information

Please note any medical conditions, allergies or dietary requirements that the Club you are volunteering with may need to be aware of

Please identify the sports that you are interested in being involved with

Characters remaining: 4000

**Police Vetting**

You are required to submit a police vetting application once every 3 years. Your police vetting expiry date is listed below. If your expiration date is soon due, please submit a [Police Vetting Application](#) after completing this registration.

Police Vetting Expiration Date  
06/09/2025

- An Athlete’s Medical expiry date is located here:

**Athlete Registration**

Parent/Caregiver or Support Person details

Emergency Contact Details

Participating Sports

Residential Care Provider

**Athlete Medical Declaration**

You are required to submit a medical declaration once every 4 years. Your medical expiry date is listed below. If your medical expiration date is soon due, you can download the [Medical Certificate](#). Once your Health Practitioner has completed this, you can upload it by completing the [Medical Declaration Application form](#).

Medical Expiration Date  
16/03/2025

#### 4. Editing Details

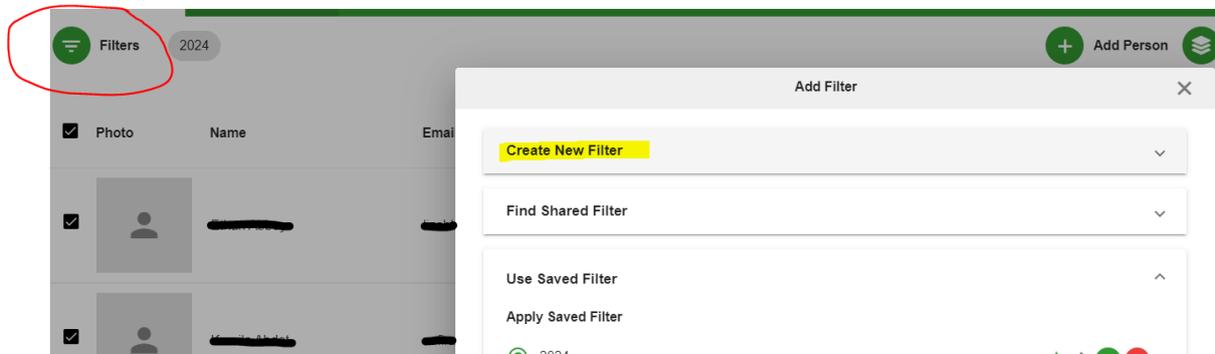
- Clubs can add information or [edit most athlete/volunteer profile details](#) that need updating or are incorrect.
- The details that clubs *cannot* edit in a person's profile are first/last names, DoB and expiry dates. If changes need to be made to these, please contact your RSC.

#### 5. Filtering

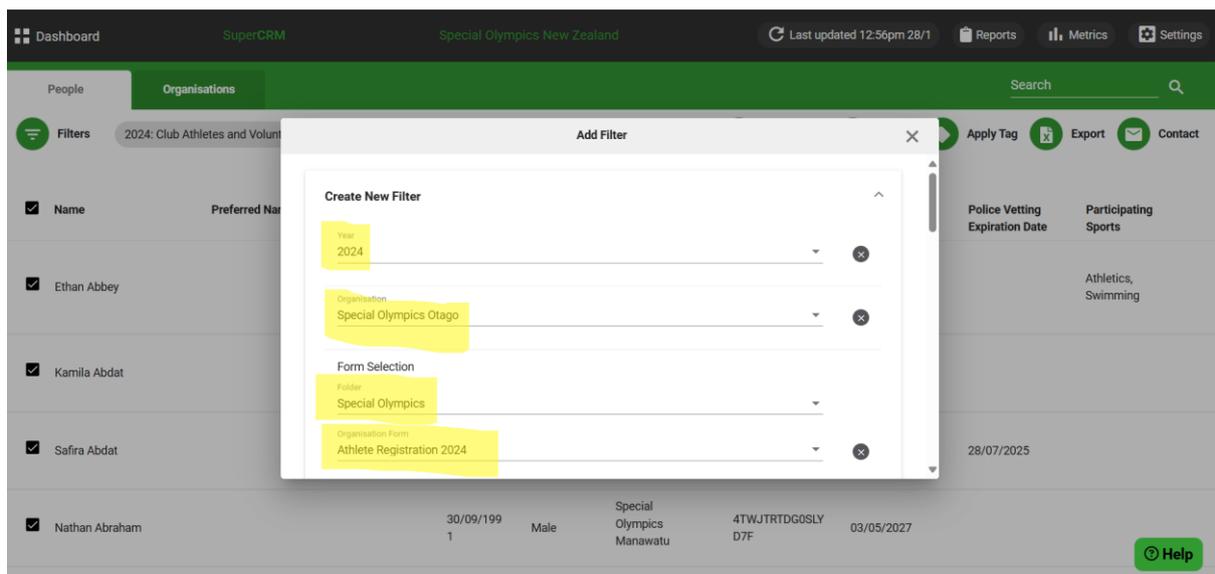
- Filtering is a key tool within Sporty and is used to bring up specific subsets of information.
- You can filter by a registration form itself (i.e. Athlete Registration Form to bring up your athletes) and any piece of information that is gathered within the registration form – i.e. gender, participating sport, expiry date etc.
- Filters can be saved for easy future use – e.g. if you make a filter to bring up all athletes who are participating in basketball, you can save and label this ‘Basketball Athletes’ so that in future you can just click this filter, rather than create it again.

Below is an example of 'How to Filter by Athletes' which will bring up just your Athletes (not Volunteers). To filter by 'Volunteer,' follow the same process but select the Volunteer Registration Form.

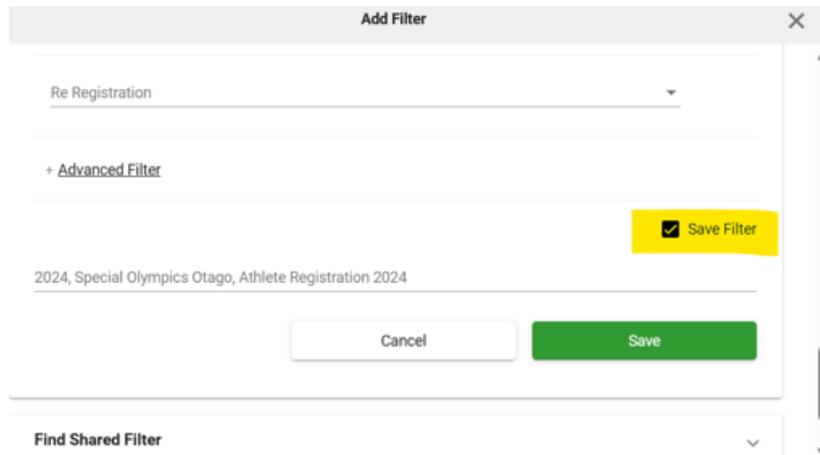
1. Click on 'Filters' in the top left, then select 'Create New Filter' when the 'Add Filter' box appears



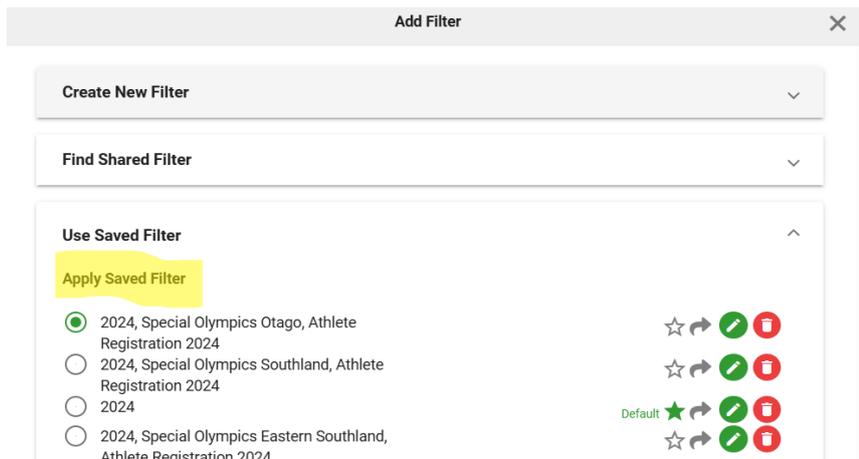
2. Select the year and the Athlete Registration Form from the Organisation Form dropdown box.



- Once these are selected, you can either click “Apply” to immediately bring up this data set, or first tick ‘Save Filter’ if you want the data set to be saved for future use, under a saved name – e.g. “Athletes”

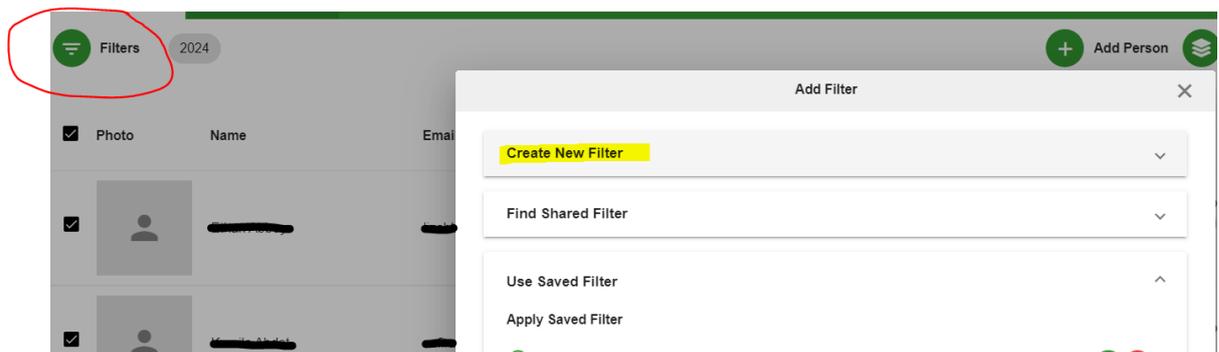


- If you click ‘Save,’ the filter will now be visible in your “Saved Filters” and the selected filter will be indicated by the green dot. You can then scroll down the screen to the ‘Apply’ button to bring up the data set again, without having to recreate the filter.



**Below is an example of ‘How to Filter Athletes by Sport’**

- Click on Filters and select ‘Create New Filter’



2. Select the year and 'Athlete Registration Form' from the Organisation Forms drop down

The screenshot shows the 'Add Filter' dialog box with the following configuration:

- Year:** 2024
- Organisation:** Special Olympics Marlborough
- Form Selection:**
  - Folder: Special Olympics
  - Organisation Form: Athlete Registration 2024
- Date of Birth Range:** From \_\_\_\_\_ to \_\_\_\_\_

3. Scroll down to the bottom of the 'Create New Filter' box and select 'Advanced Filter'

The screenshot shows the bottom section of the 'Add Filter' dialog box with the following configuration:

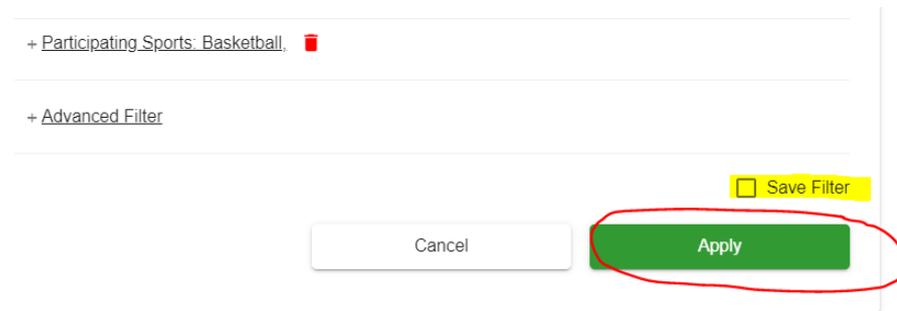
- No Date
- Reminder Complete
- Re Registration
- + Advanced Filter** (highlighted)
- Save Filter
- Buttons: Cancel, Apply

4. In the Advanced Filter box, select the question 'Participating Sports' and then the sport you want to filter by

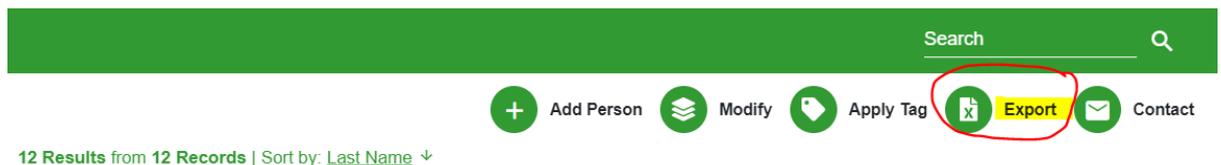
The screenshot shows the 'Advanced Filter' dialog box with the following configuration:

- Question:** Participating Sports
- Answer:** Basketball
- Buttons: Cancel, Set

- If this is a filter you want to save for regular use, select 'Save Filter' and then Apply. This will mean you don't need to set the parameters each time and can click straight to Basketball Athletes (or whatever you choose to name it).



- This will bring up all athletes who have 'Basketball' listed as a Participating Sport onto your Dashboard.
- You can export this information onto an Excel spreadsheet by clicking 'Export' at the top of the screen. Or you can select 'Contact' to email this group.



## 6. Display Settings & Exporting Information

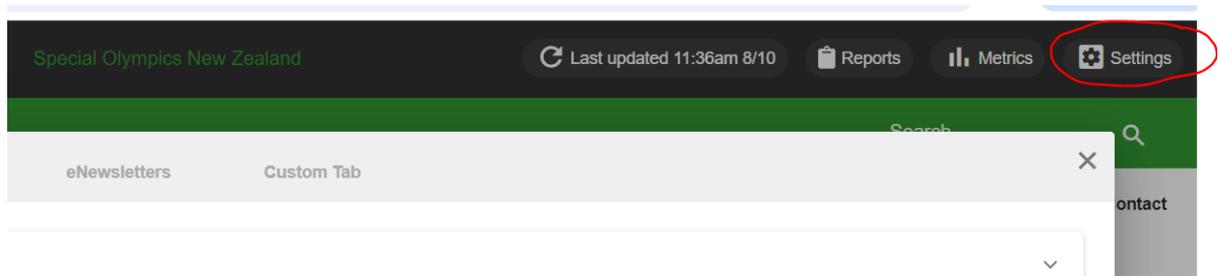
- You can edit what information you want displayed for quick access on the "home screen" of your CRM – so that you don't have to go into each registration to see this detail. For example, you may want to display medical/police vetting expiry dates to be able to check these at a glance.

Name	DoB	Gender	Medical Expiry	Sport
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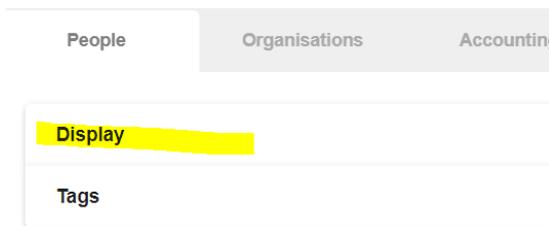
- What you choose to display can be easily changed to see different details as needed.
- The generic pieces of information (e.g name/email/DoB) are there to be selected directly.
- You can also make custom fields for other pieces of information you may want to display (i.e. medical or police vetting expiry date, or participating sport).
- Information that is displayed on the 'home screen' can be exported into an Excel file. For example, you may want to filter by 'Basketball Athletes' to bring up all your Basketball Athletes and then export a file that shows their name and emergency contact details to give to the Basketball coach.

## How to modify your Display Settings & set up custom fields within your Display Settings

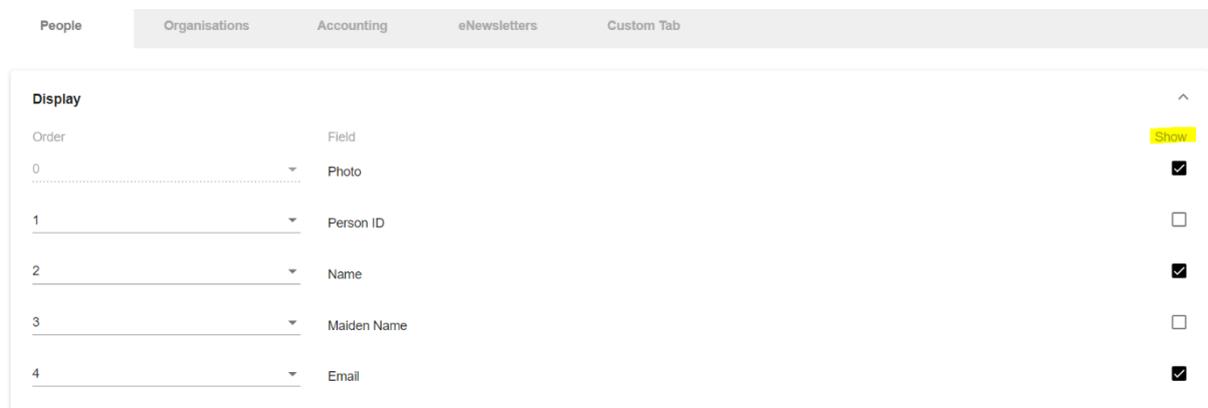
1. Click on Settings in the top right corner



2. Click on Display



This will open the various pieces of information you can choose to display – by ticking or unticking on the righthand column under the heading 'show.' Under the heading 'order,' you can adjust the order in which the information displays on your home screen.



3. To create a custom field, click on one of the Custom Field headings – this allows you to display other data that has been provided through a Registration Form. You will need to do this form Medical Expiry, Police Vetting Expiry & Sport, for example.



4. To create the 'Medical Expiry' custom field, select the following and click 'Apply'. This will now be a field you can choose to display.

**Custom Display Field**

Folder  
- Special Olympics

---

Form  
Athlete Registration (2025)

---

Question  
Medical Expiration Date

---

Display Name  
Medical Expiry

Only show latest value

5. To create the 'Police Vetting Expiry' custom field, select the following and click 'Apply.' This will now be a field you can choose to display.

**Custom Display Field**

Folder  
- Special Olympics

---

Form  
Volunteer and Unified Partner Registration (2025)

---

Question  
Police Vetting Expiration Date

---

Display Name  
Police Vetting Expiry

Only show latest value

6. To create a 'Sport' custom field, select the following and click 'Apply.' This will now be a field you can choose to display.

**Custom Display Field**

Folder  
- Special Olympics

Form  
Athlete Registration (2025)

Question  
Participating Sports

Display Name  
Sport

Only show latest value

Cancel Apply

7. Ensure the 'Show' box is ticked against your new Custom Field, so that it shows on your screen. You can also rearrange the order in which these data fields display.

People Organisations Accounting eNewsletters Custom Tab

**Display**

Order	Field	Show
0	Photo	<input checked="" type="checkbox"/>
1	Person ID	<input type="checkbox"/>
2	Name	<input checked="" type="checkbox"/>
3	Maiden Name	<input type="checkbox"/>
4	Email	<input checked="" type="checkbox"/>

8. Exporting Information

If you want to Export the information shown on your Display screen (into an Excel file), you click on the Export button noted below.

Search

+ Add Person Modify Apply Tag **Export** Contact

me ↓

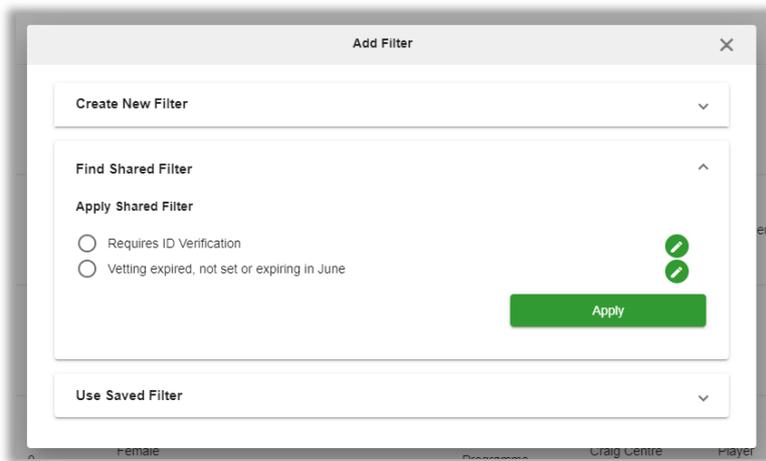
## 7. Police Vetting Processes – Verifying ID

For a volunteer’s Police Vetting Application to be processed by SONZ, their ID must first be sighted by a Club Administrator.

To identify the volunteers that have submitted a new Police Vetting Application but have not yet had their ID verified on the Police Vetting Application, use a SuperCRM filter.

*To Use the Shared Filter*

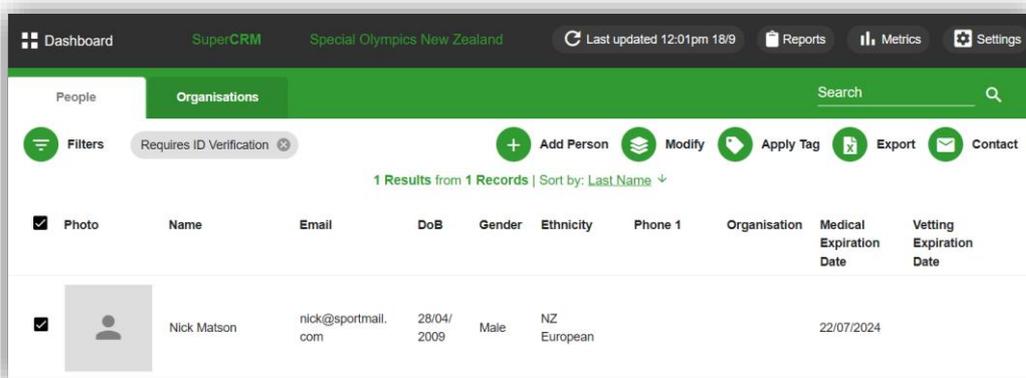
1. Click **‘Filters’**
2. Click **‘Find Shared Filter’** then select **‘Requires ID verification’**
3. Click **‘Apply’**



*Or to create a new filter*

1. Select the **‘N/A’** season
2. Select the form **‘Police Vetting’**
3. Click **‘Advanced Filter’**
4. Select **‘ID Verified’** and then click **‘Set’**
5. Click **‘Save Filter’** and name your filter e.g. **‘Requires ID verification’**
6. Click **‘Apply’**

The list of participants that require ID verification will be displayed.

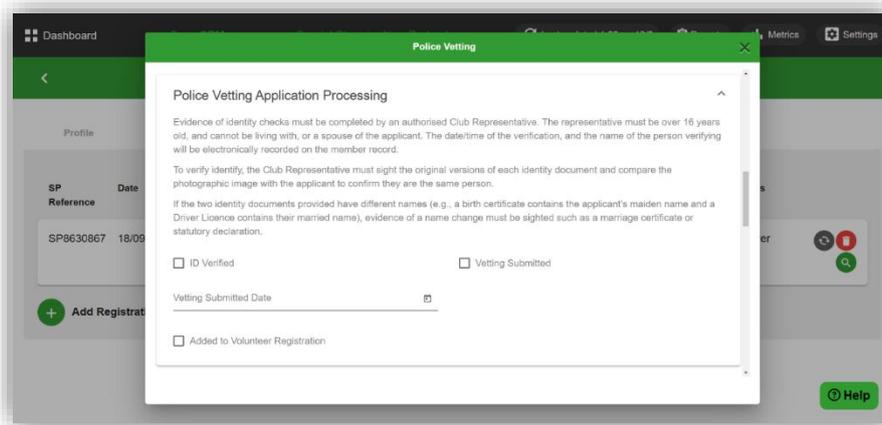


## To verify a volunteer's ID

Click on each registrant's name to open their record, then navigate to the **'Registrations'** tab to view their Police Vetting Application.



Click the **'view'** icon, displayed by a magnifying glass, to open the registration record. Verify the details entered are consistent with the physical ID that has been provided, then check the **'ID verified'** option to confirm the verification.



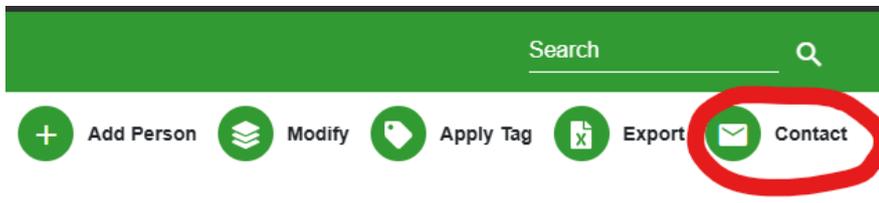
Then click **'Submit'** to complete the ID verification process. This will result in the person disappearing from your filtered list of people that require ID verification.

SONZ will monitor volunteers that have their ID verified and are ready for their application to be processed by NZ Police and will update the Police Vetting Declaration when the application has been submitted. Upon receiving police vetting approval, SONZ will update the Police Vetting Expiry Date on the volunteer's registration form. When the expiry date has been updated on the registration form, the person will be removed from the filtered results.

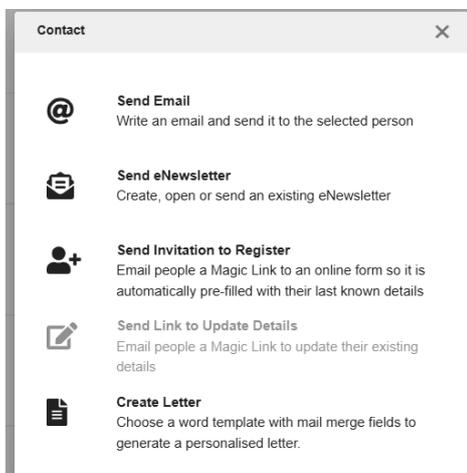
## 8. Communicating out of Sporty

- Clubs can easily communicate out of Sporty – to individuals or groups. All communications sent out of Sporty are recorded in each recipient's profile, so can be helpful for future reference.
- You can set an email signature that will appear on all emails you send from the SuperCRM – [instructions here](#)

- You can communicate to your whole membership at once, or filter by a certain group to communicate just to them – e.g. all volunteers, or all basketballers, or all NSG 2025 participants.
- Once you have applied your filter to bring up the group you want to contact, click on the “Contact” button in the top right corner



- This will offer a range of communication options that will be sent to everyone in the selected group.



- Sporty has detailed how to instructions on this [here](#)

## 8.a. Contact Athletes with an empty or soon expiring Medical

### Filtering to Monitor Athlete Medicals

Clubs can run a filter in SuperCRM to monitor athletes that have a medical expiry that has expired, is soon to expire, or has not been set. Clubs can then send an invitation to the athlete/caregiver to complete a new medical declaration.

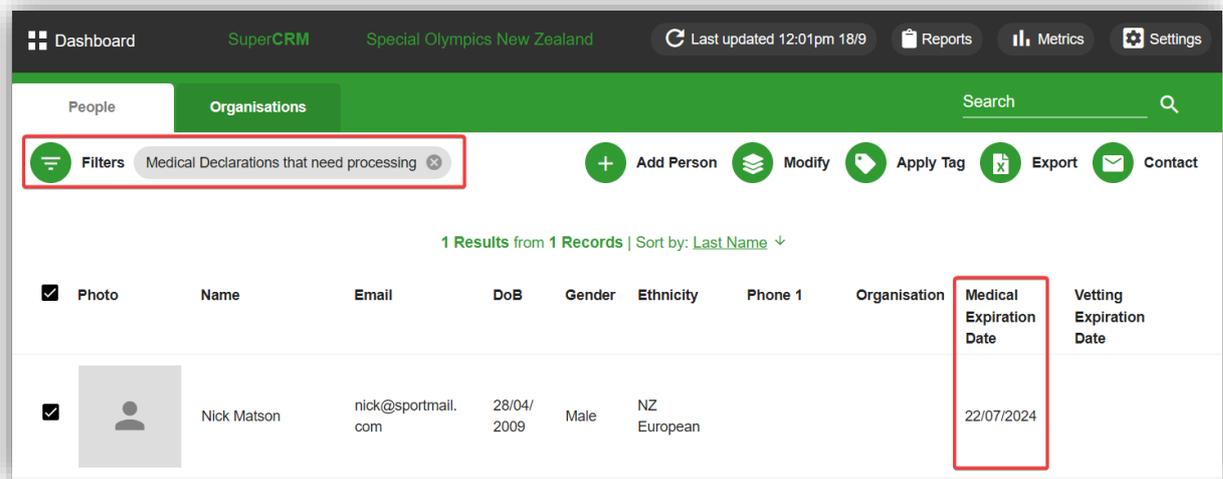
To identify the athletes that need to complete a medical declaration in SuperCRM you can create a new filter, or modify an existing saved filter. Some filters have been set up as shared filters for you to save and modify.

To generate a filter:

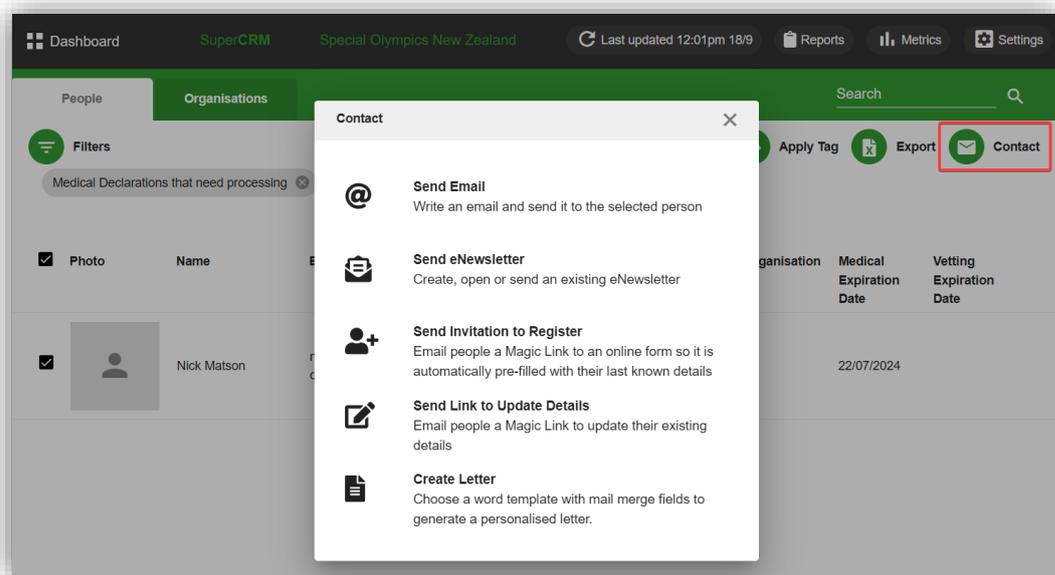
1. Click **Filters**
2. Create a new filter **or** edit your existing saved filter
3. Select the **Current Season**
4. Select the **Athlete Registration Form**
5. Click **Advanced Filter**

6. Select **Medical Expiration Date**
7. Set the period you want to report on e.g.: FROM: 1 January TO: 1 July. Tick on **No Date**
8. Click **Save Filter** and name/re-name your filter e.g.: “Medical Expired, not set or expiring in March 2025”.
9. Click **Apply**

A list of the people that meet your filter settings will appear.



After filtering your list as detailed above, Select **Contact** then **Send Invitation to Register**, select the **Medical Declaration form** and click **Send**.



## 8.b. Contact Volunteers with empty or soon expiring Police Vetting

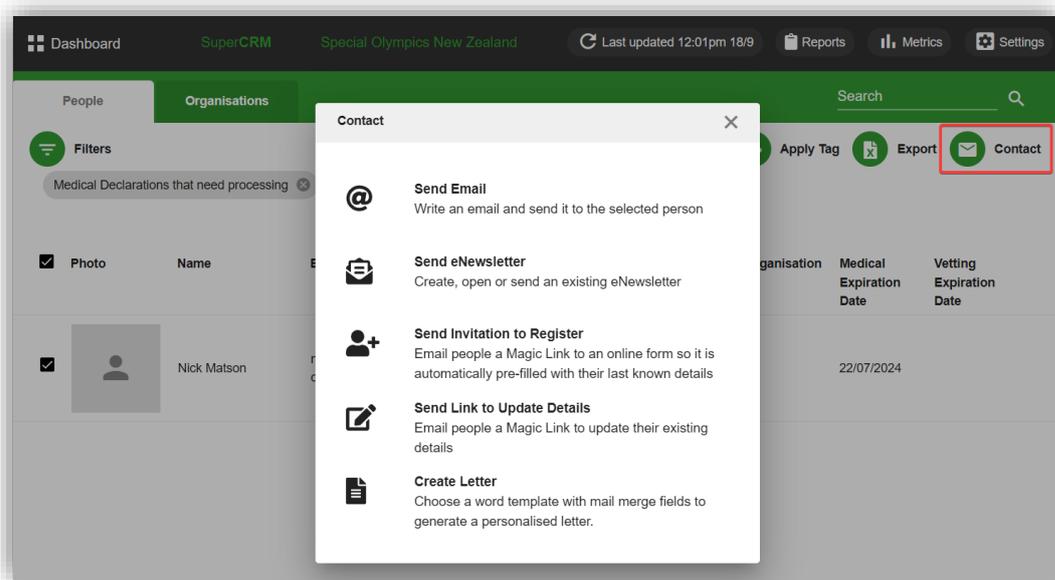
### Filtering to Monitor Police Vetting Expiries

Clubs can run a filter in SuperCRM to monitor volunteers that have a Police Vetting date that has expired, is soon to expire or that has not been set. Clubs can then send an invitation to the volunteer to complete a new Police Vetting Application.

1. Click **Filters**
2. Create a new filter or edit your existing saved filter
3. Select the **Current Season**
4. Select the **Volunteer and Unified Partner Registration** form
5. Click **Advanced Filter**
6. Select **Police Vetting Expiration Date**
7. Set the period you want to report on e.g.: FROM: 1 January TO: 1 July. Tick **No Date**
8. Click **Save Filter** and name/re-name your filter e.g.: “Police Vetting Expired, not set or expiring in March 2025”.
9. Click **Apply**

A list of the people that meet your filter settings will appear.

After filtering your list as detailed above, Select **Contact**, then **Send Invitation to Register**, select the Police Vetting Application and then click **Send**.



## 9. Adding a medical to an athlete's profile directly

As described above, Clubs can send an Athlete/their caregiver a link to upload their medical certificate.

Where this is not possible and Clubs receive the medical certificate directly, they can add this to the athlete's profile following the instructions below.

1. Click on the athlete's profile and then onto the Registrations Tab

The screenshot shows a user interface with a navigation bar at the top containing 'Profile', 'Timeline', 'Registrations', 'Relationships', and 'Financial'. The 'Registrations' tab is highlighted with a red circle. Below the navigation bar, there is a profile card on the left with a placeholder image and a 'Profile' title. To the right of the profile card, there are several fields for personal information: 'Date of Birth', 'Street Address', 'Postcode', 'Phone 1', and 'Primary Ethnicity'. Each field contains a redacted value. Below these fields, there are sections for 'Organisations' and 'Tags', both containing redacted information.

2. Click on the "Add Registration" button

The screenshot shows the 'Registrations' tab selected in the navigation bar. Below the navigation bar, there is a table with the following columns: 'SP Reference', 'Date', 'Year', 'Organisation', and 'Form'. The table contains one row of data: 'SP8742309', '01/01/2024', '2024', a redacted organisation name, and 'Athlete Registration'. Below the table, there is a green button with a plus sign and the text 'Add Registration', which is circled in red.

3. Select the Medical Declaration form and then click Add

The screenshot shows a dialog box for adding a registration. It has a 'Folder' dropdown menu set to 'N/A' and a 'Form' dropdown menu set to 'Medical Declaration (N/A)'. Below the dropdown menus, there are two buttons: 'Cancel' and 'Add'. The 'Add' button is circled in red.

*This will pre-populate the Athlete's details into the form; you then need to upload the medical certificate and select Submit. This will add the Medical to the Athlete's profile. SONZ will review and approve the medical declaration or seek further information. When approved, SONZ will update the Athlete Registration form to reflect their new medical declaration expiry date. If further information is required, SONZ will follow up with the Club/athlete.*

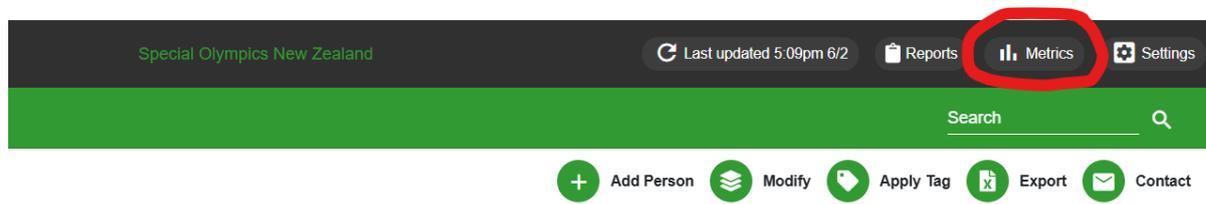
## 10. Adding a Tag

Adding a Tag can be a helpful way to group people by information that is not recorded on their Registration Form. For example, you could create an NSG 2025 Tag and add this to everyone participating in NSG 2025. This would allow you to filter by this Tag – i.e. just bring up the people who the Tag applies to.

To create and use Tags, [follow these instructions](#).

## 11. Metrics

By clicking on this button at the top of your screen, you will get a summary of the statistics and demographics of your membership – numbers, age/gender/ethnicity breakdowns etc.



## 12. Getting Started Checklist

To get started, it is recommended that your work through this Checklist (with support from your RSC as needed) to get yourselves set up for efficient use of your CRM and familiar with where key information is accessed.

Action	Done
1. Set up your Club's second CRM User if applicable	
2. Add email signature	
3. Update "From" email address	
4. Set up an Athletes filter	
5. Set up a Volunteers filter	
6. Set up a Custom Display Field – Medical Expiry Date	
7. Set up a Custom Display Field – Police Vetting Expiry Date	
8. Set up a Custom Display Field – Sport	
9. Familiarise with modifying Display Settings to present the information you want on your 'home screen'	
10. Set up sport-specific filters as appropriate	
11. Familiarise with location to "verify ID" within the Police Vetting Registration	