Overview of Starting a Team

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Frequently Asked Questions

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Create a FIRST® Account

Register a FIRST Account
• To create a new account, go to www.firstinspires.org and click on “Sign Up” at the top right corner of your browser.
  o Click on “Sign Up here” in the login screen or the “Register” link at top right of the browser.

NOTE: You will receive an email to confirm and activate your account. Check your spam or junk email folder. If you have not received the email within a few hours, return to the login page and click “Forgot Password”.

Create a Team Profile

Starting a Team
• Navigate to www.firstinspires.org and click “Log In.”
• Login using the email/password you used to register (you will be redirected to the Dashboard).
• Click “Create a New Team(s)” from your Dashboard.
• Click “Team Admin” or “Lead Coach/Mentor 1.”

  ![Image of Team Admin and Lead Coach/Mentor 1]

  o **Team Admin** - Individuals who manage teams from an administrative point of view, who will not be interacting with the students, and will usually deal with purchasing product, managing paperwork, and organizing the team behind the scenes. Team Admins will **not** have access to the Team Roster, nor can they invite students or Parent/Legal Guardians of students to the team. Team Admins who do not hold a Lead Coach/mentor role will not need to go through screening. Team Admins **MUST** invite two Lead Coach/Mentors that will be screened.

  o **Lead Coach/Mentor 1** – For individuals who plan to Mentor/Coach the team. They **MUST** go through Youth Protection Screening and invite a Lead Coach/Mentor 2.

**My Information**

• Complete your Profile Information

  ![Image of My Information]

• Every year, you will be asked to update certain fields (those listed below and Strategic Alliance affiliations):

  ![Image of Contact Information]

  **NOTE:** Screening occurs every four years, and is completely paid for by FIRST®.
• Once Completed, click “Next.”

**Program Selection**

• Select FIRST Tech Challenge.
Team Profile
- Complete Team Information
  - Team Name
    (required to create a new team, and can be changed at a later date)
  - Country
  - Zip/Postal Code
  - City
  - State/Province
  - Region
  - Team Website
    (optional)
  - Mentoring (optional)
- Once Completed, click “Next.”

School/Organization Information
- Complete School/Organization Information
  - If you don’t see your school in the drop-down menu, scroll to the bottom and select “My school is not in this list.”

Invite Primary Contacts
FIRST teams are required to have 2 screened Lead Coach/Mentors. You can pay for the season registration fee and purchase product with only one unscreened contact, however, before you can register/compete at events, both the Lead Coach/Mentor 1 and the Lead Coach/Mentor 2 must be registered and pass the Youth Protection screening.

- Invite the Lead Coach/Mentor 1, Lead Coach/Mentor 2, as well as a Team Admin. Options will be dependent on what role you chose.
  - If you are the Team Admin, you can invite yourself to be the Lead Coach/Mentor 1 or 2.
  - If you are the Lead Coach/Mentor 1, you may invite yourself to be the Team Admin.
- Once completed, click “Next.”
• You may *skip this step* if you do not have these contacts ready. Click "I will do this later."

### Confirmation Page

• A Confirmation Page will appear. Congratulations, you have successfully created a team. **You must now pay for the season registration fee.** If you applied for a grant that includes registration, do not pay until you receive the grant award notification and the grant appears in the Storefront.

• Click “For Next Steps, Go to Dashboard.”

• The New Team now displays on the Dashboard.
Invite a Lead Coach/Mentor from the Dashboard

If you did not invite the Coaches/Mentors during your team creation, you can invite them from the Dashboard.

- Under Team Contacts/Roster, click on either “Primary Contacts” or “Manage Contacts.”

- Click on “Invite Contacts” at the top or click “Invite” under the Coach/Mentor area.

- Complete the contact information and click “Send Invitation.”
  - You can invite multiple contacts at once. Click “add another” before sending invites and complete contact information.

NOTE: Hyperlinked text will appear in a blue font. Click on text to be taken directly to different areas of the site.
• A confirmation pop-up will appear.

Once you have invited your Lead Coach/Mentor 1 or 2, they will receive an invitation via email. They must complete their profile, accept your invitation, and go through Youth Protection Screening. It may take a couple of days to for the screening to be processed, so make sure to encourage your Coach(es)/Mentor(es) to complete their profile and screening as soon as possible.

**Options Under Team Contacts**

- Each role for the team is listed on the Team Contacts page.
- You can manage Contacts under “Options.”
  - Send Email – This is a one-way email system.
  - Invite Replacement
  - Request Screening – Screening should be completed before first team meeting. A team cannot register/compete without completed and passed screening from BOTH Lead Coach/Mentors.
  - Delete this Contact – If you do not have a replacement or the information is wrong, you can delete the contact.

**Locating Your Invitation**

Once you have sent out your Invitation, your Lead Coach/Mentor 1, Lead Coach/Mentor 2 or Team Admin must Create a FIRST Account and login to accept your Invitation. The invitation is located at the top right of the Dashboard.
• You have two ways to access invitations
  o Click on the Invitation icon or click your name and a drop down will appear. Click on “My Roles/Invitations.”

Click on Invitation Icon.

Click on “My Roles/Invitations” under the drop down.

• All invitations and accepted roles will appear.
• Click on “Accept” under the Invitation or click “Accept All” if multiple invitations are listed.

NOTE: If you volunteer for events, your “Event Roles” will be listed here.

From here, the Lead Coach/Mentor 1 or 2 will be able to go through Youth Protection Screening and help manage the team.

Retiring from a Team
If you must retire from a team, you can do so from the “My Roles” page.

• Navigate to the “My Roles” page from the drop-down listed under your name.
• Click on “Options” under the Accepted Role.
• You can:
  o Retire from team – Leave team without a replacement.

Options -

0 Retire from team
0 Invite Replacement
o **Invite Replacement** – Invite a replacement while leaving the team.

**Enter the Storefront**

The Storefront can be accessed before Coach/Mentor screening is complete. Once your *Team Profile* has been completed, you are ready to pay your team’s season registration fee and order the necessary equipment. Follow these simple steps to register your team:

1) Log into your team dashboard at [www.firstinspires.org](http://www.firstinspires.org).

2) Under Team Finances, select “Team’s Shopping Cart” or “Make A Payment” under the Finance Options dropdown. Or, select “Order Product” under Payment & Product, to enter the Storefront and place your order for the Season Registration and product. **NOTE: YOU MUST PAY FOR SEASON REGISTRATION BEFORE YOU CAN PURCHASE PRODUCT.** If you have multiple teams, you will need to select the team you wish to register before proceeding to the Storefront. From the Dashboard:

   o Under Team Finances, click either “Balance Due” or “Make A Payment.”
3) Once in the Storefront, agree to the Storefront Terms and Conditions by selecting the checkbox on the welcome screen.

4) The FIRST® Tech Challenge Season Registration will automatically be loaded into your cart.

5) Select “Checkout.”

6) Enter your payment information and select “Submit Order.”

You can choose to pay for only the season registration fee or continue through the wizard and purchase one item each from each category (Control Set, Electronics Set, and Competition Set).

Click “continue” to go through Wizard. Or if you are looking for a specific item, click on the appropriate Tab at the top.
Generate a Quote

- Load your cart with all the items you wish to purchase.
- Navigate to the Checkout page.

![Checkout Page Image]

- Scroll to the bottom of the page and click on “Generate a Printable Quote for This Order (PDF).”

![Quote Generation Image]

A PDF Quote will download to your computer. If you need to wait for your funding to be processed (ie: Purchase Order), it is recommended that you click on “Save My Order for Later.”

NOTE: Orders will not be submitted until you have returned to the Storefront, completed your Payment Method, and have clicked “Submit.”

Before you Submit Order – If you are waiting for a Grant

- If you are expecting a grant through your FIRST® Tech Challenge account, do not submit your order until your grant funds appear in the Storefront. If you are unsure how your grant funds will be allocated, please check with the entity supplying the grant before submitting orders in the storefront.

  a. Grants will appear on the welcome page of the Storefront.

  Grant Notice

  No grants are active for your team. If you are expecting a grant, do not submit your order until your grant funds appear in the Storefront.

  b. If you are paying for your order via a purchase order, be sure to send a copy of the purchase order to Pitsco, as instructed when checking out.
• If your purchase is exempt from the United States, states sale tax, be sure to send a copy of your Tax-exempt certificate to Pitsco, as instructed when checking out.

A Few Notes on the Storefront
• You can track what is available in the “Order History” box on each page.

![Order History](image)

• You can navigate between the different tabs:

![Tabs](image)

• International Teams: Season Registration is paid to your local Affiliate Partner, where applicable, and is not included in the Storefront. Please contact your local Affiliate Partner for season registration instructions.

• Looking for ways to fund your season?
  b. Fundraising Resources: [http://www.firstinspires.org/node/5406](http://www.firstinspires.org/node/5406)
  c. Team Budget & Fundraising: [https://www.firstinspires.org/resource-library/ftc/team-management-resources](https://www.firstinspires.org/resource-library/ftc/team-management-resources)

Find a Discount Code for TETRIX® and REV Robotics
• Enter the Storefront.
• Click on the “Support” Button at the upper right corner of each page.

• Click on the “How to Order Extra Parts.”
Each link will take you to the Vendor’s Website.

- TETRIX® and REV Robotics discount codes will appear below their logo. It’s only available once a team has fully purchased their Season Registration Fee.
Complete Youth Protection Screening *(US and Canada only)*

For US and Canada teams, to hold team meetings and compete at an official FIRST event, a team must have **two screened Lead Coach/Mentors**. If you have not completed screening, follow the steps below. You will be redirected to the Verified Volunteers (US) or myBackCheck (Canada) website. For more information, visit http://firstinspires.org/resource-library/youth-protection-policy.

- Under Team Options, Click on “Outstanding Tasks.”
- Click on “Incomplete Youth Protection Screening.”

**Team Options**

- You will be prompted to navigate to continue to the screening website. Click “Continue.”
- You will be redirected to our third-party screening site. Complete the necessary steps.

**Understanding Screening Status**

Information located in the “Manage Team Contacts/Roster” Section.

- **Green Check Mark** - User is screened and meets requirements
- **Orange Check Mark** - Screening is pending (either User, Screening Vendor, or FIRST review)
- **Red “X” Mark** - Not complete
  - Used also to indicate Missing Consent & Release

**What are Outstanding Tasks?**

Outstanding Tasks will be listed on the Dashboard. Clicking on these tasks will take you to:
• Pay Team Registration – Storefront
• Youth Protection Screening – Verified Volunteer/MyBackCheck (US/Canada only)
• Consent and Release – Consent and Release Form

And any other additional Outstanding Tasks will take the user directly to the page that will complete that step.

NOTE: Clicking on hyperlinked text listed in red will prompt a pop-up to appear. Issues/Outstanding Task will be listed. You can click on “Resolve” to complete an outstanding task and be redirected to the necessary page.

The Consent and Release form can be accessed by clicking on the arrow next to your name.

• Click on your name and a dropdown will appear.
• Click on “Acknowledgement Forms.”

How to Register for an Event

Event registration for all FIRST Tech Challenge events, except the World Championships, are managed by local Affiliate Partners. Connect with your local Affiliate Partner to learn more about how to register for events in your region.

• YOU MUST HAVE 2 SCREENED LEAD COACH/MENTORS TO REGISTER FOR AN EVENT.
  o You will not be able to invite Youth Team Members until BOTH Lead Coach/Mentors have successfully completed and passed Youth Protection Screening.
  o NOTE: Once passed, you will be able to invite the Parent/Legal Guardian of the Youth Team Member from the Team Contacts Page.
• Ensure that each team member has a Parent/Legal Guardian who can register and complete the Consent & Release forms within the Youth Team Member Registration System. The Youth Team Member Registration System also lives within the FIRST Portal and is located within the Dashboard.
  o Click “Youth Members."

Note: If a parent or legal guardian does not have access to a computer with internet, paper Consent & Release forms can be filled out. Paper forms can be accessed by Lead Coach/Mentor 1 and 2 in the Team Contacts section under Youth Members.

• Print a Team Roster, which is required at check-in for Events.
  o Under Team Contacts/Roster, click “Print Roster.”

• View a sample Team Roster on the Team Management Resources page.

Additional Resources

Blogpost
• Navigating the FIRST Website – Useful Links: http://firsttechchallenge.blogspot.com/2016/07/navigating-first-website-useful-links.html

How do I use my Grant?

If you have a Registration and/or Product grant, these grants will show up in the Storefront and be applied directly to your purchase at Checkout. These grants are not available to be used outside the Storefront but can be used across multiple purchases until all funds (or items) have been utilized/purchased.

NOTE: Product grants can be applied to shipping costs as well.

FIRST receives grants from various Donors (Grantors) which are designated to FIRST participating teams. These are restricted donations with designations as defined and imposed on FIRST by the Grantor(s). Should FIRST receive a grant designated to your team, FIRST will “re-grant” the funds to your teams as a “pass through” grant with no deductions for overhead or processing costs. 100% of the designated funds will be re-granted provided that the Team (Grantee) follows the guidelines listed below.

The following guidelines are followed when processing a re-grant for a team:

1. The re-grant must be a minimum of $500 for FIRST® LEGO® League Jr., FIRST® LEGO® League and FIRST Tech Challenge and $1,000 for FIRST Robotics Competition.
2. FIRST receives the Grantor’s donation and designation in writing. FIRST applies the amount needed to satisfy the open payment of the team’s registration fee before any re-grant can be issued.
3. Any additional funds, above the team’s registration fee (some restrictions may apply) can be re-granted to the team.
4. The Grantee (FIRST® Tech Challenge Team) initiates the process of receiving these pass-through funds and maintains audit compliance*.

Funds can only be re-granted to your team for costs directly associated with the FIRST Program. FIRST cannot disburse funds directly to the Team’s or School’s vendors/providers due to the IRS Form W-9 needs and the potential volume.

*Should the Grantor request a follow-up report on the exact use of the re-granted funds, it is the responsibility of the Grantee (School) to maintain adequate records to provide an accurate accounting.

Re-granting Application: [https://usfirst.submittable.com/submit/9715acfe-65b6-420b-9b11-043ce617abaf](https://usfirst.submittable.com/submit/9715acfe-65b6-420b-9b11-043ce617abaf)

**How do I delete a temporary team?**

If you have a temporary team that needs to be removed (it was created by mistake, you are only moving forward with another team, etc.), follow the below steps to have the team permanently removed from your profile. NOTE: if you have more than just yourself as a contact for the team (Lead Coach/Mentor 1, Lead Coach/Mentor 2, Team Admin), this will also delete the team from their profiles.

- Under Team Options, click on “Team Information.”

  ![Team Information](image)

  ![Delete Team](image)

  ![Outstanding Tasks](image)

- Click on “Delete Team” on the pop-up window that appears.
A confirmation pop-up will appear. Click “OK” to return to the Dashboard.

Where can I get more help?

The FIRST Operations team is ready to answer any questions or walk users through the account creation process. The office hours are Monday – Friday 8:30am-5:30pm EDT. Help outside of these hours may be arranged by contacting FIRST via one of the methods below:

Phone: 603-666-3906 or 800-871-8326

Email: firsttechchallenge@firstinspires.org

Chat: available on www.firstinspires.org