



WORKPLACE CHALLENGE

Team Captain Management Guide

The CBIZ Workplace Challenge online registration system aims to help Team Captains manage their teams better. This Guide is meant to show you how to use the system and answer questions that may arise.

The registration system requires that all registrants join a Corporate Team. To create your team, follow the instructions below.

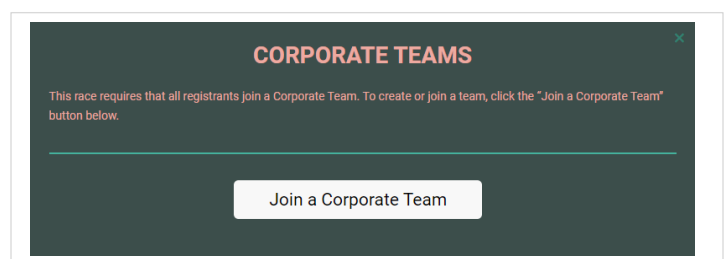
Even if you registered a team in 2024, you must create a new team each year for your company. However, you can use your same login and password as in 2024.

CREATING YOUR TEAM

Go to www.CBIZWorkplaceChallenge.com and click on the Registration tab.

Click on: **Team Captain: Create/Manage Your Team**. This will take you to the site where you will be able to create and manage your corporate team, as well as where your employees will go to register.

To Start:
Click the JOIN A CORPORATE TEAM button.

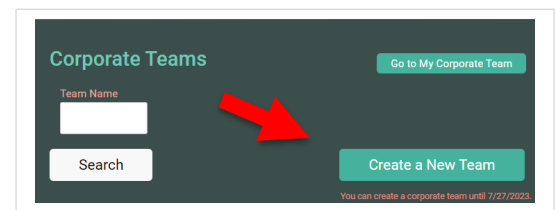


1. Click on the Create a New Team button.

You will then see a login page.

If you've registered a team in 2024, submit your email and password on the left.

If you are registering a new team, click the Create a New Team button on the right.



2. Setup Basic Team Options

- **Team Name** – Make this something easy to understand and remember so employees will be able to recognize it among the many teams listed.
- **Team Type** – There is only one type.
- **Event Costs %** - Enter the % of the costs you are willing to pay for employees. 100% means you will pay the entire cost. 75% means you will pay for 75% of the cost.
- **Stop Paying Date** – This date will be your cut-off for paying for entrants.
- **Maximum Number Covered** – This is the total number of registrations (employees, family and friends combined).
- **Family/Friends Setting** – you can enable an employee to also add others to their registration. Check the box to turn this on.

If not checked, only employees would be able to join your team and receive your cost offset. If checked, you can specify a limit to the number of additional members that your organization will pay for. You can also specify the rules – we have default text that can be replaced with anything you want.

The screenshot shows a web form titled "Create Corporate Team" with a "Help" button in the top right. The form is divided into several sections: "Team Name" and "Team Type" (a dropdown menu), "Event Costs" (with input fields for percentage and dollar amount, and explanatory text), "Cost Coverage Options" (with a paragraph explaining the settings), "When Will You Stop Paying for Team Members?" (with a date input field and format instructions), "Maximum Number of Members Covered" (with a numeric input field), and "Family and/or Friend Settings" (with a checkbox and text). The form is styled with a light blue background and orange accents.

Create Corporate Team Help

Team Name *

Team Type * (Select a Team Type)

Event Costs

Event Costs the Team will Pay for *Each Member*? * % + \$ 0.00

E.g. Enter 0% + \$0 if the member will pay the full amount or 100% + \$0 if the team will pay for the member.

If a member registers for multiple events in a single registration, the fixed dollar amount will be applied for each event.

Enter a Code that Members Must Enter to Join the Team

Optional, but recommended if paying for team members.

Cost Coverage Options

If you entered zero in the percent of costs that the team will cover, these settings have no meaning. If you will pay for team members, these settings allow you to limit when and how many registrants you will cover.

When Will You Stop Paying for Team Members?

America/New_York Time
Format: mm/dd/yyyy
Ends at 11:59pm on this date.

Maximum Number of Members Covered

Family and/or Friend Settings

Are Family Members and/or Friends Included?

☐ Yes, family members and/or friends can join this team.

3. Custom Questions

A) **You MUST completely fill out your mailing address** (both the street address AND the city, state, zip code). **This will be the primary mailing address for mailing out any event materials.** If you work remotely, use the address where you wish materials to come.

B) Top Dog: You may register a "Top Dog" for your team. It is optional, not mandatory. The Top Dog must meet the criteria below. Please complete this question AFTER your Top Dog has registered for the event. You may email CBIZWorkplaceChallenge@cbiz.com with your Top Dog's name to confirm that he/she is properly designated as a "Top Dog."

***TOP DOG ELIGIBILITY:** To participate in this category you must be the most senior executive at the company who is participating in the event (ex: CEO, COO, CFO, Senior Partner, Director, Principal). A company must have at least 5 participating members in order for a Top Dog to be submitted. On the evening of the event you must complete and submit to your captain a "Top Dog" scorecard in order to be eligible for the "Top Dog" award and listed in the results. The decision of the Marcum Workplace Challenge Race Committee regarding "Top Dog" eligibility is final.*

Corporate Team Created!

TEAM PAGE

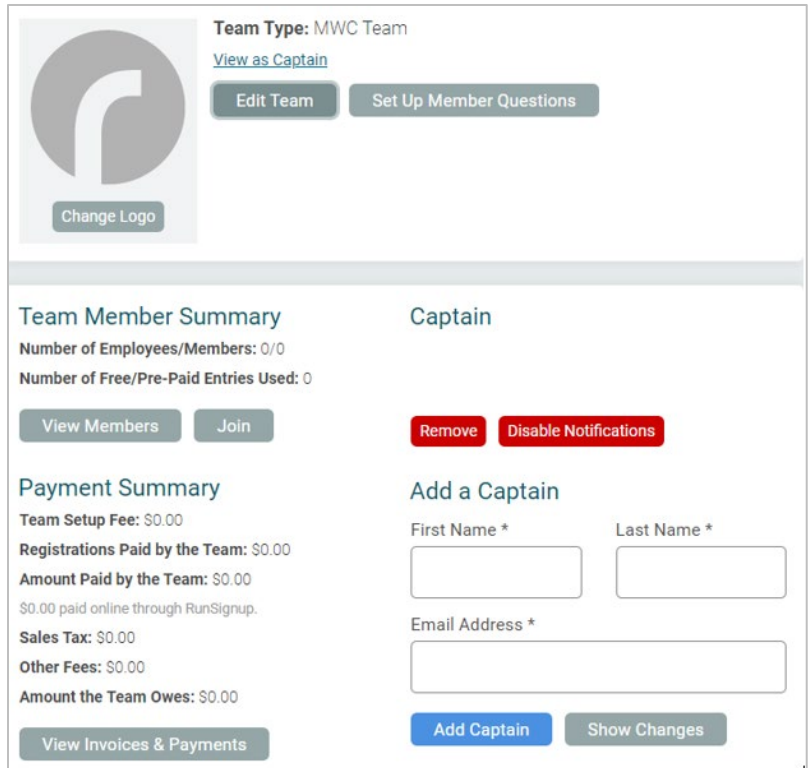
Edit Team – Allows you to edit your initial options and to add some more.

Set-up Member Questions – Allows you to ask questions of all of your team members. For example, you may want to ask them if they want to volunteer to bring food.

Logo – You can upload your company logo

View Members – This will show you who has joined your team and their status.

Join – **Don't forget to join yourself!** You just set the team up – now is a good time to become the first team member, and not just the Captain!



The screenshot shows the 'Team Page' for an 'MWC Team'. At the top left is a circular logo placeholder with a 'Change Logo' button below it. To the right, the 'Team Type' is 'MWC Team', with a link to 'View as Captain' and two buttons: 'Edit Team' and 'Set Up Member Questions'. Below this is a horizontal separator. The main content is divided into two columns. The left column has a 'Team Member Summary' section showing 'Number of Employees/Members: 0/0' and 'Number of Free/Pre-Paid Entries Used: 0', with 'View Members' and 'Join' buttons. Below that is a 'Payment Summary' section listing: 'Team Setup Fee: \$0.00', 'Registrations Paid by the Team: \$0.00', 'Amount Paid by the Team: \$0.00' (with a note '\$0.00 paid online through RunSignup'), 'Sales Tax: \$0.00', 'Other Fees: \$0.00', and 'Amount the Team Owes: \$0.00', with a 'View Invoices & Payments' button at the bottom. The right column has a 'Captain' section with 'Remove' and 'Disable Notifications' buttons. Below that is an 'Add a Captain' section with input fields for 'First Name *', 'Last Name *', and 'Email Address *', and 'Add Captain' and 'Show Changes' buttons at the bottom.

Add & Change Captains – You can share the Captain responsibilities with others - they will then be able to see this same Team Set-up page.

View Invoices & Payments – this is where you can track how much you owe and see how to make payments.

Edit Teams

Family and/or Friend Settings

Are Family Members and/or Friends Included?

☐ Yes, family members and/or friends can join this team.

Maximum Number of Family Members and/or Friends per Registration

Family Member and/or Friends Notice

This notice will be shown to users when registering. You can use it to include details on what type of family members are included.

Non-Employees Pay for Themselves

☐ Non-employees will not be covered by the team.

Advanced Options

Hide from Public Teams List

☐ Yes, hide this team from the public team list.

Priority on Teams List

Higher priority teams will appear higher on the team list.

Custom Teams URL

https://runsignup.com/CorporateTeams/

Allow Stand-Alone Non-Employees Registrations

☐ Yes, allow a non-employee to register without requiring them to register with an employee.

Team Joining Closes

Ends at 11:59pm on this date.

You will be able to edit the options you set when you first created your team, like the password or how many employees and family members you want to help pay for.

In addition, you can decide whether you want to let people register on the public team page, and whether you want to create your own URL so that you can send employees directly to register.

Finally, you can enable non-employees to register independently from employees. In the standard mode, employees and their families must register together.

Custom Questions

You can ask any type of question to the members of your team when they register. You will be able to report and download all the responses, which can help you organize your team.

As you can see on the right, you can enter responses that members can choose from.

You can select the way the responses are given – in this case we have chosen checkbox, which allows people to select multiple responses. You can also let people type in free form, only choose one thing with the Radio button, select one item from a menu, or simply do a Yes/No type of question.

Custom Question

Question *

Question Type *

Free Form

☒ Check Box

☐ Radio Button

☐ Yes/No

Possible Responses

Response	
<input type="text" value="Water"/>	↑ × ↓
<input type="text" value="Bananas"/>	↑ × ↓
<input type="text" value="Power Bars"/>	↑ × ↓
<input type="text" value="Apples"/>	↑ × ↓
<input type="text" value="Bananas"/>	↑ × ↓

☐ Require Response
☒ Ask Each Member

Image

Choose File

No file chosen

CLEAR

Additional Details

ADD QUESTION

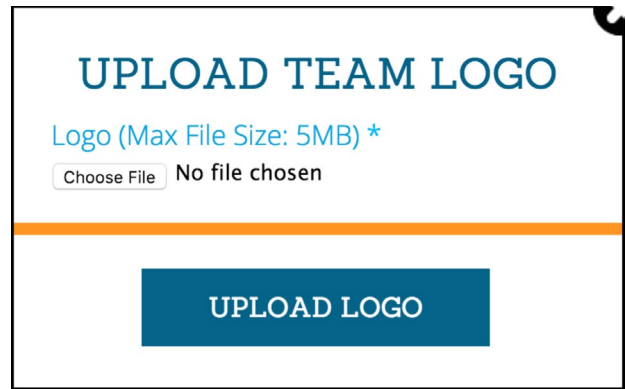
SAVE QUESTIONS

DISCARD CHANGES AND GO TO TEAM PAGE

4.

Change Logo

We make it easy to upload your organization's logo (or another fun picture) for your team page. This will help your employees identify which team to join and enhance your company image.



UPLOAD TEAM LOGO

Logo (Max File Size: 5MB) *

Choose File No file chosen

UPLOAD LOGO

View Members

This will allow you to view and remove members of your team.

If you notice someone on your team has incorrect information, only they can change it for security and privacy purposes. They can simply log back in where they registered and modify their Profile to update information.

Removing a member will remove them from the race, and fees they may have paid will not be refunded.

Captains

You can add and remove Captains very easily.

Note that the new Captains must have a registered account in the online system. They can do this simply by joining the team, or can go to www.RunSignUp.com and click on Sign Up to create an account.

Captain

First Name * Last Name *

E-mail Address *

ADD CAPTAIN **SHOW CHANGES**

VIEW INVOICES AND PAYMENTS

You will be able to view payments you have made – both online and offline.

Payments					
Payment Date	Payment Amount	Processing Fee	Amount Applied to Account	Registrations Through	
03/22/2013 08:36am	\$100.00 (Paid Offline)	Team: \$0.00 Race: \$0.00	\$100.00	03/21/2013 11:59pm	View Payment

[Back to Team Page](#)

In addition, you will be able to see invoices and amount due. You will be able to pay this online or send a check.

Corporate Team Invoice #00000009: Eastern Lift

Viewing as Caption... View Normally

Registrations Through	03/21/2013 11:59pm
Due Date	03/29/2013 11:59pm
Invoice Amount	\$270.00
Amount Paid	\$0.00
Processing Fee	\$16.20
Amount Due	\$286.20

Credit Card Information

First Name

Bob

Last Name

Bickel

Address

407 Chester Avenue

City

Moorestown

State

New Jersey

Zip Code

08057

Credit Card Number

Expiration Date

CVV (Card security code)

[Pay \\$286.20](#)

That's all there is to it! If you have questions, please feel free to:

- Check our website www.CBIZWorkplaceChallenge.com for further Captain information,
- Send us an email at: CBIZWorkplaceChallenge@cbiz.com
- Call 516-359-9409

We look forward to seeing you on August 5!