Types of files:

* Participants list has these columns: *full\_name, first\_name, BUID, email, school, department[, round1, group1, round2, group2, …]*
  + When you download the match, it appends a new column
  + When you upload a participant list, it needs a new column for that round that says “Yes” or “No” for each person
* Data has these columns: *prior\_matches, current\_match, current\_group, num\_prior\_matches, size\_prev\_match, possible\_matches, num\_possible\_matches*

Before Round 1

1. Link all opt-ins to master intake data and create the participants list

Round 1

1. Import participants list (Round\_1\_participants)
2. Choose group size
3. Create Match
4. Download Match 🡪 (Round\_1\_participants\_matched)
5. Download Data 🡪 (Round\_1\_data)
6. Send Emails

DO NOT COMPLETE MATCH

During Round 1

1. Import participants list (Round\_1\_participants)
2. Import round 1 data (Round\_1\_data)
3. Send Reminder Email

Round 2

1. Import participants list (Round\_2\_participants)
2. Import round 1 data (Round\_1\_data)
3. Choose group size for round 2
4. Complete Match
5. Create Match
6. Download Match 🡪 (Round\_2\_participants\_matched)
7. Download Data 🡪 (Round\_2\_data)
8. Send Emails

DO NOT COMPLETE MATCH

During Round 2

1. Import participants list (Round\_2\_participants)
2. Import round 1 data (Round\_2\_data)
3. Send Reminder Email

Follow same procedure for round 3 and onward.