



Affiliate Database Administrator Guide

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1. Intro

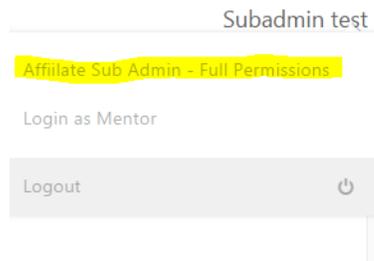
Every ACE affiliate should have at least one person assigned to manage its database. These individuals are responsible for managing registrations, creating and assigning teams, administering background check invitations, uploading affiliate compliance documents and more. The affiliate database administrator serves a crucial role within the affiliate that touches all aspects of the ACE program. Therefore, it is important that your affiliate should select an individual who can be trusted with sensitive student and mentor data and relied upon to manage the database with consistent vigilance.

Anyone with access to student and mentor profiles needs to undergo a [background check](#), updated every 3 years, through Sterling Volunteers, ACE's background check provider.

2. Gaining Sub-Admin Access to the Database

1. [Login](#) to your ACE Profile. If you don't have a profile, [create](#) a new volunteer profile.
2. Register for the current program year as a mentor/volunteer. Select "database administrator" in the role section (along with all other relevant roles) of the registration and complete the mentor training.

3. Notify your regional director that you have successfully registered and he or she will invite you to complete a background check.
4. Once your background check has cleared, your regional director can assign you as the database administrator (Affiliate Sub-Admin – Full Permissions).
5. You should now be able to login to your ACE profile and switch your user view to “Affiliate Sub-Admin – Full Permissions” in the top right corner under your name:



6. Your regional director can also provide you with your affiliate admin login (more on this below).

3. Sub-Admin Vs. Affiliate-Admin Access

The difference between these two access levels is subtle yet important. Both allow you to manage most of aspects of the database:

- The **sub-admin** user role is granted through an individual’s mentor/volunteer profile. All affiliate database sub-admins must have a mentor/volunteer profile with an up-to-date background check. (See [Sub-Admin](#) section above).
- The **affiliate-admin** is a generic login for the entire affiliate that is not connected to a mentor/volunteer profile. It is helpful to think of it as a profile for your affiliate with its own login and password. When logged in as the affiliate admin, you have access to the [affiliate profile](#) where you can add [sub-regions](#), include an [affiliate description](#) that appears to applicants during registration and manage affiliate [compliance documentation](#).

Although the affiliate admin password is generic, it should not be shared with any unauthorized database admins. To access the affiliate profile, contact your regional director.

4. Student and Mentor Search

The student and mentor search pages are perhaps the most important and powerful aspects of the database. You can search any number of fields to get your desired results. Furthermore, you can export search results, selecting only the fields you want to see in the export file.

The search pages are set to default to the current program year. If you want to search in a past program year, make sure it is selected in the “Program Year” drop-down. If you want to search **all** program years, open the drop down and scroll up to “select.” You will notice that all other drop-down fields default to “select.”

SEARCH STUDENT RECORDS

SEARCH KEYWORD
Search by Name or Email

PROGRAM YEAR
Select
Program Year 2018-2019
Program Year 2017-2018
Program Year 2016-2017
Program Year 2015-2016
Program Year 2014-2015
Program Year 2013-2014
Select

SELECT AFFILIATE
Select Affiliate

REGISTRATION STATUS ⓘ
Select

GENDER
Select

YEAR IN SCHOOL
Select

CITY

Bulk editing is a time-saving feature of the database. In the search results table, you can [update the program status of multiple student/mentor profiles all at once](#). For mentors, you can also [send bulk background check invites](#).

5. Student Registration & Parent Consent Forms

a. Student Registrations

One of the principal tasks for a database administrator is managing the annual student registrations. This is because registering is a multi-step, multi-path process that involves completing the online registration as well as getting a consent form signed by a parent/guardian and returned to the database. Sometimes students get stuck during this process and don't complete their registration. It's important to note that before registrations are complete, the admin's ability to edit them is locked. Therefore, making sure that students complete the registration process is crucial.

The registration (steps 1-3) and the consent form are separate steps. Once a student completes the 3 registration steps (below), admin access is opened; this should help manage the consent form process. Students with incomplete registrations will receive periodic reminder emails from ACE National to complete their registration.

3 Registration Steps:

1. Basic Info (new students create profile)
 - a. Username & Password
2. Personal Info (returning students start here)
 - a. Parent name & contact
 - b. DOB, Gender & Ethnicity
 - c. Address
 - d. Best days to meet, interests, free lunch qualification
3. Affiliate Selection and Education
 - a. Select Program Year

- b. Select Affiliate
- c. Select Sub-region (if applicable)
- d. Education info

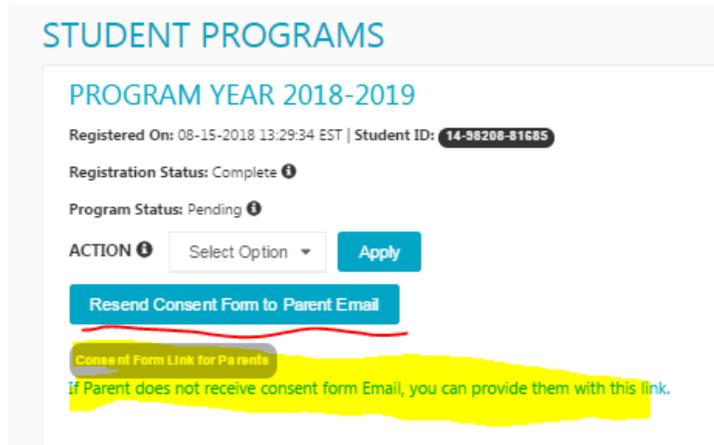
As the database administrator, you can help to mitigate common issues that students experience by providing upfront and ongoing guidance to students as they work through the registration process, such as the [student registration guide](#). With the right info, the process is relatively easy.

b. Consent Form

The next requirement that must be fulfilled is submission of a signed and completed consent form. The student is presented with two options at this point: digital or paper/manual form. Students opting for the digital pathway must provide a parent email. When they sign and submit the online form, an email is automatically sent to their parent email address. The parent must then complete the fields on the form, sign and submit. When complete, the student's consent form status will update to "yes."

If a student or parent has issues submitting the digital form, they also have the option to remove the form on file and download/upload a paper copy.

The database administrator can also re-send the email to the parent. If the parent doesn't receive the email, the database administrator can also provide a unique URL that can be sent directly to the parent which will also direct them to the form.



Students who do not provide a parent email will need to upload their completed paper form back to their profile. They also have the option to submit the completed form to their team leader, who can upload the form for them. **Without parent consent forms, either in digital or paper format, on file, a student is not approved to participate in ACE.**

The best strategy for managing registrations/consent forms occurs when the database administrator and team leaders work together to guide students through this process. Team leaders interface with students regularly and have registration/consent form management access in the database ([team leader guide](#)). Anyone who has worked with teens knows that they sometimes require more than one reminder to complete tasks. The database should be

viewed as a tool to help ACE National and our affiliates achieve 100% compliance but this does not replace the need for working directly with students to make sure they meet the program requirements.

6. Mentor/Volunteer Registration

The annual mentor/volunteer registration process is much more straightforward than student registration because it doesn't involve consent forms. However, all volunteers registering for ACE must go through the same registration process. In other words, mentors, board members, database admins, etc., all must fill out the same registration fields including the mentor training. The mentor training is the final registration step and is required for all volunteers, even if they will not be actively mentoring. All active mentors & board members must re-register every program year.

Returning volunteers should be instructed to **login to their existing profile when re-registering**. If they create a new profile, they will have duplicate profiles in the system. Their existing background check will not carry over to their new profile, and you will be double charged for a new background check. Therefore, please make sure to instruct your mentors to login to their existing profile.

A password recovery feature is available if necessary. If a volunteer forgets their email address (profile user ID), you can look it up for them in their profile. If they no longer have access to their email account associated with their ACE profile, you can go in and change their email address for them. If none of the above works, please contact your regional director for assistance.

Returning volunteers should login to their existing profile and **not** register as a new volunteer

An important part of the mentor/volunteer registration process is identifying role(s) for the upcoming program year. Once selected, these roles are searchable in the mentor search feature.

IN WHAT ROLE(S) WILL YOU SERVE ACE THIS PROGRAM YEAR? (SELECT ALL THAT APPLY)

- MENTOR
- TEAM LEADER
- BOARD MEMBER
- JUNIOR/ASSOCIATE BOARD MEMBER
- DATABASE ADMINISTRATOR
- SCHOOL CHAMPION
- GUEST SPEAKER
- AFFILIATE STAFF
- OTHER: (WRITE IN)

All applicants must go through the mentor training as the final step, including non-mentor volunteers.

Registration will not be complete (and you will not be able to edit their info) unless they have completed all 5 registration steps. The [Mentor Registration Guide](#) provides more detail on the registration steps and can help you better understand the process for mentors. You are encouraged to provide this guide to your mentors to help them register correctly.

7. Managing Background Checks

All mentors/volunteers who attend more than 20% (2 or more) of ACE sessions and anyone with access to student and mentor personal information in the database must undergo a background check every 3 years with ACE's approved vendor, Sterling Volunteers. The ACE database is integrated with Sterling Volunteers through an API that allows us to manage most aspects of mentor/volunteer background checks from within the ACE database.

From the mentor search results page, you can view background check status and expiration date as well as several other fields that will assist you in determining which mentor/volunteers need a new background check. You can also invite volunteers to complete background checks in bulk – a feature that saves a lot of time.

Your affiliate will be charged the cost of every background check conducted in your affiliate's name. Therefore, it is important that you only send background check invitations to volunteers who meet the background check policy requirements. Not every volunteer is required to undergo a background check.

Some database administrators have invited every single volunteer in the database to undergo a background check. While we appreciate this added security measure, we don't advise you do this unless your affiliate wants to go well above and beyond the policy requirement (and pay for it). As of 2018, the average background check cost was \$44.

a. Sending Background Check Invitations

To send background check invitations, search for your volunteers in the mentor search section. Use the various search fields to narrow down your search. Check the box in the left column of every volunteer's profile who needs a background check. Double check this list twice to make sure you have selected the right people. Go to "BULK ACTION" >Select Option>Order Background Check>Apply.

Now all volunteers you selected will receive an email invitation from Sterling Volunteers (not ACE) with a unique link to apply for a background check. Once completed, the background check application takes an average of one day to process (depending on jurisdictions checked). You can follow the mentor/volunteer's progress in the "background check status" field, which updates through the API to show the following statuses:

- **Open Invitation** – Invitation email sent by Sterling Volunteers through ACE API, but volunteer hasn't yet completed application
- **In Progress** – Volunteer completed background check application. Sterling Volunteers is currently conducting the background check
- **Eligible** – Volunteer has passed the background check and is eligible to work with students
- **Not Eligible** – Volunteer's background check is complete, and they are NOT eligible to participate in ACE (ACE national will reach out to you).
- **Expired** – Previous background check is older than 3 years old. Volunteer must redo background check to participate in ACE
- **Fail** – There was an error with the background check invitation. Volunteer most likely did not receive email invitation. Contact your regional director if this occurs.

b. Troubleshooting Issues with Invitations

Some volunteers may not receive the email invite from Sterling Volunteers in their inbox. It may have been filtered to their junk mail folder or their email provider's firewall may have blocked it. If the volunteer can't find the email, you can go into their profile and get a unique URL link to send directly to them. This is the same link in the email invitation from Sterling Volunteers and will connect their background check to their profile in the API. **Do not, under any circumstances share this link (which is unique to the individual) with other volunteers/mentors!** It is not a generic invitation – each link is encoded with information unique to the individual volunteer's ACE profile. If you send one volunteer's link to someone else, the info will get jumbled between the two databases and you may be double charged to process the background check.

BACKGROUND CHECK T

Status: Open Invitation ⓘ

Requested By: [REDACTED]

URL: Link

Request Date: 08-13-2018

Effective Date: N/A

Expiration Date: N/A

Description (If failed): Your request has been sent successfully, Volunteer URL is <https://app.verifiedvolunteers.com/verify?>

c. Re-sending Invitations After Original Background Check Expires

Once an existing volunteer's background check has reached its 3-year anniversary, it is considered "expired" in the database. You may now re-invite this mentor to undergo a new background check using the same process described above. Some mentors may have expiration dates that fall during the program year, and therefore, there may be some time between the old background check expiration and processing of the new background check. To this end, you are permitted a 30-day grace period – a sufficient amount to allow for the new background check to be processed.

If a mentor's background check has been expired for over 30 days, they will not be permitted to attend any ACE sessions or events until they have successfully passed an updated background check.

If you have any issues with managing your affiliate background checks, reach out to your regional director. They are very familiar with the process and can assist in most cases.

8. Student & Mentor/Volunteer Statuses

There are several different status categories featured in the database. Understanding each of these statuses is key to successfully managing the various user types in the database:

- **Profile status** – (*active or inactive*) Status of the participant's profile – very rarely goes inactive, usually due to registration issues. If a participant cannot access their profile due to an "inactive" status, contact your regional director for assistance.
- **Registration status** – (*incomplete or complete*) Has the participant successfully registered for the current program year? For students, this is steps 1-3. For mentors, steps 1-5 (including the mentor training). Once they successfully register, admins can manage their profile, assign program status, etc.
- **Parent consent form status** – (*yes or no*) Have the student & parent/guardian successfully submitted the required consent form? This status will remain as "no" after the student signs but before the parent signs.
- **Program status** – (*pending, active, inactive, declined*) determined by individual's participation in ACE during the program year. This status is determined by team leader or database administrator. Default setting is "pending." Students must be "active" to be eligible to apply for scholarships and other opportunities.
 - **Active*** – the student/mentor is actively participating in the ACE sessions
 - **Pending** – this is the default status when a student/mentor registers (a student/mentor should never remain "pending," as they should be updated to reflect their status)
 - **Inactive** – More than 2 unexcused absences from ACE sessions (may vary by affiliate & team)
 - **Declined** – for whatever reason, the student/mentor is NOT eligible to participate

**Students must be "active" to be able to apply for scholarships and take advantage of other ACE opportunities like summer camps and internships.*

At the end of the program year, all "active" and "pending" profiles are moved to "complete," and all "inactive" and "declined" are moved to "incomplete."

Determining Program Status

The only status category that is not automatically determined is [program status](#). This is what ACE uses to determine overall program participation, insurance billing and much more, so correctly labeling each participant is very important. ACE national sets a deadline for affiliates to have these statuses updated toward the end of the program year (usually in March). In the old database, database administrators were solely responsible for selecting program status. However, [team leaders](#) now have access to edit this status because they are more aware of each team member's participation level. The team attendance feature was also created to help in determining the appropriate status for participants. Database administrators should work directly with team leaders to decide who will be responsible for managing student program statuses.

Change Program Status in Bulk

As the database administrator, you can change program statuses in bulk from the main search results page. To do so, perform a search to isolate the participants whose statuses you want to change. Check the box on the left of each profile you want to change. Go to Bulk Action>Select Option>Select the appropriate status from the drop down>Apply. Now double check to make sure the appropriate statuses have been changed.

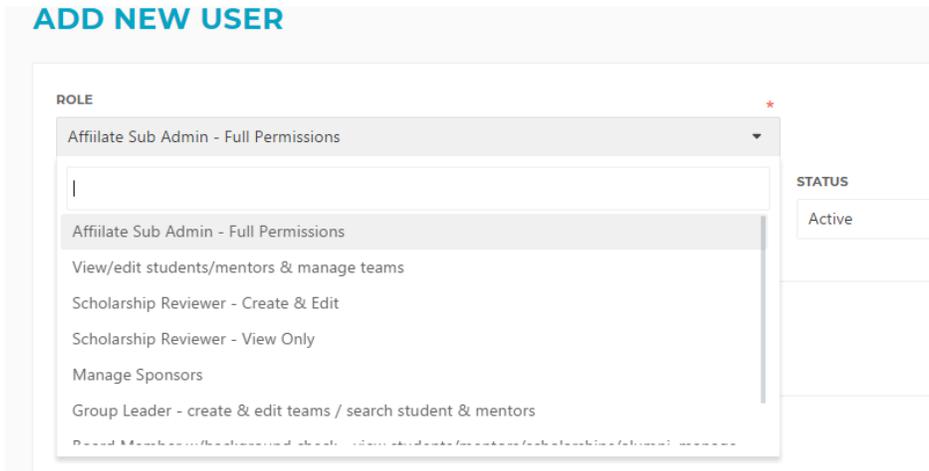
9. User Management - Assigning Sub-Admin Access

As the database administrator, you can assign various database sub-admin roles to anyone with an active mentor/volunteer profile in the database. This powerful feature allows us to protect sensitive student and mentor data while giving multiple users only the info they need to do their job. For example, you may have a scholarship committee that needs to review scholarship applications. You can assign them the sub-admin role of "scholarship reviewer." Or you may want to provide access to your treasurer to manage the sponsorship section.

The list of sub-admin roles found in the "manage users" section can be expanded. If you have a suggestion for a new role, contact your regional director – we can potentially add it to the list.

To view or assign roles, go to "Manage Users" in the left column. From here you can view your current sub-admins and see who is active/inactive and their assigned role. Users can only be assigned one role at a time. **Your list of sub-admin users should be reviewed regularly to ensure those no longer involved do not still have sub-admin access.**

To assign a sub-admin role to an active mentor/volunteer click on the blue "Add New" button. From here you can see the list of available sub-admin roles and search your list of mentors/volunteers from the drop down. Make sure they are marked "active." This individual should now be able to switch to their sub-admin access from their profile by clicking their name in the upper right corner and selecting their new role.



10. Managing Affiliate Profile

Setting sub-regions, affiliate description and managing documents.

Just like students and mentor/volunteers, affiliates have “profiles” in the database with their own email addresses and passwords. There are some slight but significant differences between a mentor/volunteer profile with sub-admin full access and one with affiliate profile access. Principally, when you are logged in as the affiliate, you can see the affiliate profile, which is where you can set up sub-regions, create an affiliate description and manage your important affiliate documents.

The email address associated with your affiliate’s profile is where we send weekly database status reports highlighting new registrations, background check expirations and other relevant activity related to managing the database.

To gain access to your affiliate’s profile, contact your regional director.

a. Sub-Regions

The optional sub-region feature is a great way to organize your database by the regions, teams or schools. Any entry you include here will show up as a drop-down option for applicants during registration. By grouping applicants into regional categories, you can make the task of assigning teams much easier. Some affiliates use the sub-region feature to list teams. This works well if your applicants already know the team they would like to join. Please note that the sub-region feature is not a substitute for [assigning participants to teams](#), but it is one way to make team assignments easier by identifying team members before team assignments are made.

b. Affiliate Description

The affiliate description is a great tool for improving the registration process for applicants. Once applicants in the database select your affiliate, your affiliate description will appear in the registration. This is your opportunity to provide any relevant info you’d like to give to applicants – for example, a link to your webpage, important program dates or more details about sub-regions or teams.

SELECT THE ACE AFFILIATE PROGRAM IN YOUR AREA. ⓘ

PA Eastern (Philadelphia/Montgomery/Chester Counties) ▾

SUB REGION ⓘ

PA-Philadelphia ▾

The selected ACE Mentor Affiliate will be processing registration application from 07-17-2018 to 05-31-2019 for the current program.

Affiliate Description:

THE ACE MENTOR PROGRAM OF EASTERN PA | www.acementorepa.online

Founded in 2000, the ACE Mentor Program of Eastern Pennsylvania gives students from local high schools an exciting opportunity to learn more about potential careers in architecture, engineering and construction!

In 2018-2019 we will have teams* in the following locations:

- PHILADELPHIA CO. | CenterCity, University City
- MONTGOMERY CO. | Cheltenham, East Norriton, Pottsgrove, Souderton, Spring-Ford
- CHESTER CO. | Henderson High School

You have selected PA Eastern (Philadelphia/Montgomery/Chester Counties) Please confirm

Image: Student view of Affiliate Description

c. Editing Affiliate Profile

To add sub-regions, affiliate description or update email/password, log in as your affiliate and select “Manage Affiliate” in the left column. Go to “Affiliate Profile.” Here you can see if you have an existing description or sub-regions. To add or update either part, go to Select Option>Edit>Apply in the top right corner. In the “Sub Regions” box type the name of the region you want to add and hit enter or return on your keyboard. The sub-region will now appear in blue to signify that it has been added to the drop down. To remove a sub-region, click on the ‘x’ next to it. Keep in mind that removed sub-regions will no longer be available in the search section drop down. However, they will still show up in the individual’s profile and on export results.

SUB REGIONS

PA-Philadelphia x PA-Montgomery x PA-Chester x

DESCRIPTION (Will appear on the Student / Mentor registration application.)

☰ ☰ ☰ ▾ 🔗 - ✕

THE ACE MENTOR PROGRAM OF EASTERN PA | www.acementorepa.online

Founded in 2000, the ACE Mentor Program of Eastern Pennsylvania gives students from local high schools an exciting opportunity to learn more about potential careers in architecture, engineering and construction!

In 2018-2019 we will have teams* in the following locations:

- PHILADELPHIA CO. | CenterCity, University City
- MONTGOMERY CO. | Cheltenham, East Norriton, Pottsgrove, Souderton, Spring-Ford
- CHESTER CO. | Henderson High School

d. Affiliate Compliance Documents

The affiliate profile is where required affiliate compliance documents are stored. You should keep the most updated version of all required compliance documents in the affiliate’s profile. If you are missing a document, work with your board of directors and regional director to make sure you have a plan to locate it and get it uploaded. You are required to have all on file all compliance documents to be considered an active ACE affiliate in good standing. You can upload multiple versions of each document.

The effective date should be the date the document was issued, signed, or went into effect. In most cases, it will not be the date the document is uploaded.

The 990/990N Tax document should be uploaded every year.

REQUIRED COMPLIANCE DOCUMENTS			
CATEGORY	EFFECTIVE DATE	NO. OF DOCS	ACTION
Affiliate Agreement	08-16-2010	1	View
Articles of Incorporation	09-10-2002	1	View
By Laws	01-27-2000	1	View
EIN Confirmation Letter	04-06-2017	1	View
Annual 990/990N/990*	06-30-2015	3	View

11. Team Management

Because team leaders can only see members already assigned to their team, only sub-admins with access to all student and volunteer profiles can create and assign members to teams. Therefore, it is very important that your affiliate has a system in place for identifying which students and volunteers should be on which teams. Some affiliates use the [sub-regions](#) feature to list teams so that applicants can select their team during registration. Of course, this only works if your applicants already know what team they will/want to be on. You can also make use of the many searchable registration fields in the participants' profiles such as zip code, place of work, school name, team preference, etc. No matter what system you use, communication between team leaders and affiliate admins is crucial for the team assignment feature to work.

a. Creating Teams

The first step to organize your affiliate into teams is to create your teams. This must be done every program year as teams will not carry over from the previous year. In the left-hand column go to Teams>Create Team. Here you can provide a team name and give a description which will show up in all team members' profiles. This can include team meeting location/time, team leaders' contact info and/or any other relevant info that you want to share with the entire team. Make sure you set the team status to "active." Click the blue "Create Team" button. Now the team is active, and you can assign members to it.

b. Assigning team members

In the left-hand column go to Teams>Search Teams. Select the current program year and click the blue "search button." A list of this program year's teams should now be visible. Find the team to which you want to add members and click the "add member" action item on the far-right column. Here you can see any existing team members. To add members, click the blue "Add More" button. This takes to you a search page. You have the option to search in either student or mentor/volunteer databases. You can search by any of the available fields to help you narrow down your list of team members. Once you have your search results, you can go down the list and check the box on the left-hand column next to each profile you want to add to

the team. Double check this list to make sure it is correct. Now click the blue “Add to Team” button.

									Add to Team	Export
NAME	CITY	AFFILIATE	SUB REGION	TEAM	PROGRAM YEAR	REGISTRATION STATUS	PROGRAM REGISTERED ON	PROGRAM STATUS	ACTION	
<input checked="" type="checkbox"/> Robert Juliet	Los Angeles	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	07-10-2018	Completed		
<input checked="" type="checkbox"/> Test Test	chicago	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	07-17-2018	Pending		
<input checked="" type="checkbox"/> Pauly D	Las Vegas	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	N/A	Pending		
<input checked="" type="checkbox"/> Johnny Bravo	asdad	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	N/A	Pending		
<input type="checkbox"/> Andrew Johnin	jhjkhk	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	07-17-2018	Pending		
<input checked="" type="checkbox"/> Johnny Bravo	Chicago	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	07-17-2018	Pending		
<input type="checkbox"/> Ted Tester	Chicago	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	07-11-2018	Completed		
<input checked="" type="checkbox"/> Chevy Chase	Las Vegas	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	N/A	Completed		
<input type="checkbox"/> Test Test	222	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	N/A	Completed		

c. Assigning Team Leaders

Each team should have at least one team leader who will need access to manage the team in the database. Assigned team leaders can see the team list, manage consent forms and background checks, take attendance and get team contact info.

To assign a mentor as a team leader, they should first be assigned to team. In either the “Add Member” page or the “View” team list, find the mentor’s record. There should be an action item labeled “assign as team leader.” It will either be a purple button or an icon, depending on which page you are on. Select this option for all mentors you’d like to make team leader. They will now have team leader access to their team. You can turn off their team leader access in the same place it was selected. Also, if a mentor is managing more than one team, you can give them team leader status on more than one team.

For more info on team leader access, see the [Team Leader Guide](#).