## ACE Database: Team Leader Guide

1. Intro

The **Team Leader role** in the ACE database is designed to provide team leaders with access to the student and mentor information they need to successfully run their ACE team. This includes access to the team list, the ability to track attendance, manage mentor background checks and manage student forms and participation (program) statuses.   This guide will assist you in learning how to use each team leader feature.

Please note that each affiliate has a different way of dividing the work between affiliate database admins and team leaders. To be sure, always check with your affiliate database admin to find out which of the following items require your assistance in completing.

2. Accessing Team Leader Features

To access the **team** section, login to your mentor profile in the ACE database and go to "**My Teams**" in the left-hand column in your profile and find the team you would like to manage. If you have been assigned as the team leader, the "**manage team**" button will be available. This will take you to your **team dashboard** where you can **view** the mentor and student profiles, **export** student/mentor info and **manage** team attendance. If you do not see the "manage team" option, please contact your affiliate administrator to have them assign you as a team leader.

Please note that you will not see any team members on your team list until they have been assigned to your team by your affiliate's database administrator. If you have a student or mentor who has registered in the database, but does not appear on your team list, please contact your database admin to request the team assignment.
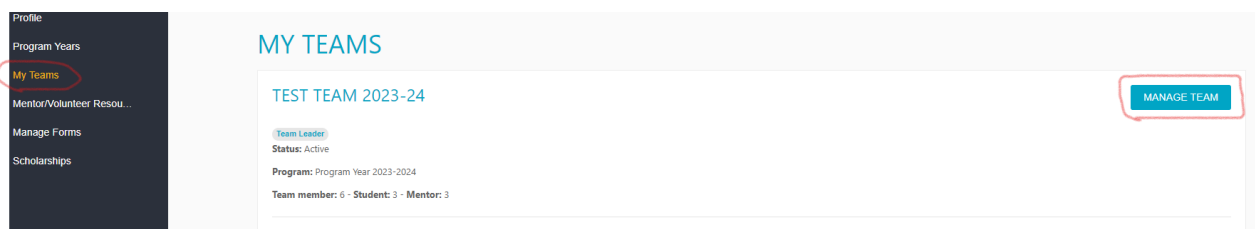
3. Managing Student Registration and Parent Consent Forms

Completing Registration

In order for students to participate in ACE, they must have a **complete registration** and **parent/guardian consent form** in the database. As a team leader, **part of your role is to make sure your students are completing their registration and submitting the consent for with their parent/guardian**. If a student doesn't complete their registration, **ACE and you individually are both potentially liable** for anything that occurs with ACE students during your team sessions, so please make sure all students are registered and submit their consent forms prior to attending ACE sessions or events.

In the main student list, you can see which students have a "**complete**," or "**incomplete**" **registration status**. Please reach out to those students who are "incomplete" and encourage them to complete all 3 registration steps.

Students with "incomplete" registrations will have the following info visible in their profiles. As a team leader, you can see how far they have progressed in their registration and guide them to complete the missing steps:

PROGRAM YEAR 2023-2024

Registered On: N/A | **Student ID:**

Registration Status: Incomplete ℹ

Step 1: Basic Registration ✅

Step 2: Personal Info

Step 3: Affiliate and Education

Program Status: Pending ℹ
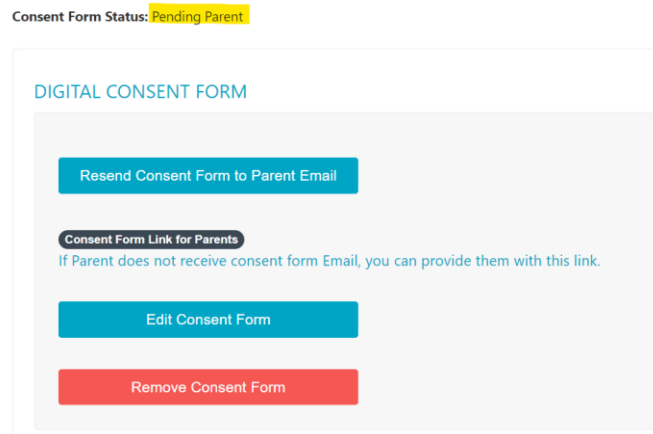
SET PROGRAM STATUS ℹ   Select Option ▾   [Apply]

Parent/Guardian Consent Form

In past years, we gave students the option to submit this form in either digital or paper format. However, starting in the 22/23 program year, the **paper form option was phased out**, so all students will need to complete the digital form. This change has already resulted in a signifcantly higher completion rate as many students were confused by the digital vs. paper choice and abandoned the process at that stage. In the past few years, only a very small percentage of students were still using the paper form.

Upon completion of registration, the student is taken immediately to the consent form. When the student signs and submits their portion of the online form, an email is automatically sent to their parent/guardian's email address as well as to the student, and reminder emails will follow until the form is complete.

The database administrator <u>and student</u> can also re-send the email or provide a direct link to the parent/guardian portion of the form. These options can be found in the student profile area. The URL is unique to that student's profile and should not be shared with anyone else but that student's parent/guardian.

Consent Form Status: Pending Parent

DIGITAL CONSENT FORM

Resend Consent Form to Parent Email

Consent Form Link for Parents
If Parent does not receive consent form Email, you can provide them with this link.

Edit Consent Form

Remove Consent Form

Consent Form Status Definition:

Each stage of the process is represented by a different **status**, which is shown on your team list as well as within each student's profile. Using these statuses to is key to managing your affiliate's consent form compliance:

- **Not Received** = Student has not completed their portion of the form.
- **Pending Parent** = Student has completed their portion of the form, but the parent/guardian has not completed their part (More common than "not received")
- **Received** = Both student and parent/guardian have completed the form. Student is eligible to participate in program.

We have integrated the fields in the form with the rest of the database. This means team leaders can pull up medical and emergency contact info for their entire team at once. If a student or parent has provided medical or allergy information, a heart icon will appear next to their name in the student list to alert you to their medical info. You are able to sort and export this info from the team management section in the database.

4. Managing Attendance

To manage your team's attendance, click the "**Manage Attendance**" button in the top right corner. From here, you can **create** as many "sessions" as you like. Sessions can be mentor sessions, field trips or any other event for which you would like to track your team's attendance.

Sessions can be created in advance or retroactively.

TEAM ACE ATTENDANCE
(**Team members:** 5) - (**Students:** 2 - **Mentors:** 3)   Create Session   Back

Please note: Engagement Percentage calculates as follows:
- Present & Excused = Present
- Absent = Absent
- N/A = Not Applicable – Does not count toward total attendance percentage. (ex: can be used for a guest speaker or another volunteer not expected to attend every session)

Filter By   ☐ STUDENTS ☐ MENTORS   Search

FIRST NAME	LAST NAME	%	‹	TRADES DAY 06-27-2023 THE DARKSIDE ✏ ✕ 💬	SANDCASTLE COMPETITION 07-28-2023 ✏ ✕ 💬	›
ACE	Mentor Mentor	0%		NA	NA	
Anakin	Skywalker	100%		P	P	
Jabba	Hut Mentor	100%		P	P	
Lois	Lane Mentor	50%		A	E	
Luke	Skywalker	100%		E	P	

To create a session, click "**Create Session**" in the top right corner. Select the **session date** and give it a **name**. You also have "**session location**" as an optional session descriptor.

After this you can go down the list and **take attendance** by marking students and mentors present, excused, absent, or N/A. **Present & Excused** will count toward the total program engagement percentage. **Absent** will not count toward the engagement percentage. **N/A** does not count toward total engagement percentage and can be used for guest speakers or other volunteers who are not expected to attend every session.

The "**Filter By**" section at the top of the list allows users to filter by students or mentors if needed Hit "**Submit**" at the bottom right of the page when complete. Your record is now saved.

You will notice that a participant's **attendance percentage** will change with each record your mark for them. You can use these attendance percentages to determine program participation status. "Excused" will count as "present" for the purposes of the attendance percentage calculation. If you do not make a selection for a team member, they will **default to "N/A"** for that session.

You can also **edit existing attendance record**s. You may have a student who brings a doctor's note after you had already marked them "absent," and you would now like to change them to "excused" for that day. Click on the **blue pen icon** at the top of the session to make the change.

Another scenario that may require editing a session is a student who is assigned to the team by the affiliate database admin after attending the first few ACE sessions. Once they are on your team, you can go back to previous sessions and mark their attendance retroactively. And please remember to get all your students to register (with complete consent forms!) as early as possible in the program year, preferably before the mentor sessions start.

5. Determining Student and Mentor Program Status

Another column in both student and mentor lists is "program status." This is what ACE uses to determine overall program participation scholarship eligibility, 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). This is the only status you as the team leader can actually change yourself (as long as the student/mentor has a "complete" registration!). In the past, affiliate admins were solely responsible for selecting program status. We gave you access to this status because as the team leader, you are more aware of each team member's participation level. The team attendance feature was also created to assist you in determining the appropriate status for team members.

To set the program status for a team member, click "view profile," then go to "Student/Mentor Programs" and find the record for the current program year (ie. Program Year 2017-2018). Next to "ACTION" there is a drop-down menu with all the status options. Make the selection, then hit the blue "Apply" button.
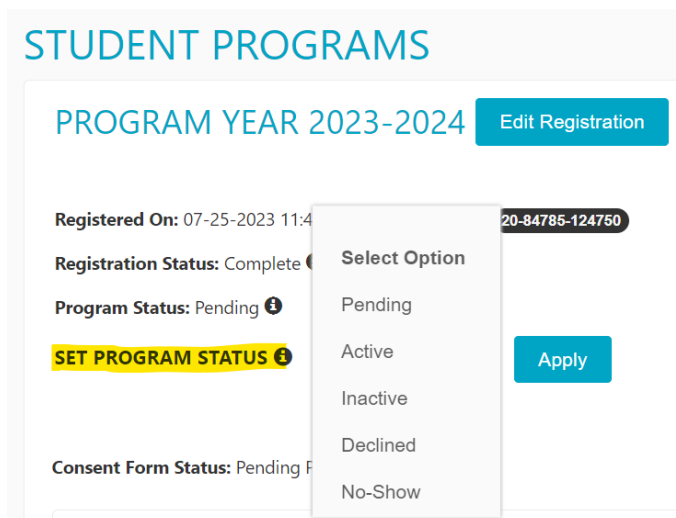
Here is each status definition:

- **Pending** – Default/awaiting status designation. Status should not remain in pending when participation status is known
- **Active** – Actively attending at least 75% of ACE sessions and/or fewer than 4 unexcused absences (varies by ACE affiliate)
- **Inactive** - Registered and attended at least one session, but fewer than 75% of ACE sessions and/or more than 3 unexcused absences (varies by affiliate)
- **Declined** - Registered but either didn't meet the program qualifications OR ACE affiliate could not offer the applicant a spot on a team
- **No-Show** - Registered but did not attend any ACE sessions.

Students with "active" status are eligible for student (and future alumni) scholarships, internships, and other ACE opportunities.

6. Mentor Background Check

Before managing the background checks of the mentors on your team, check with your affiliate database admin. They may want to manage the background checks for the entire affiliate on their own. If more than one person is ordering checks at the same time, more than one check could be ordered for the same mentor, which will end up costing your affiliate double the fees!

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 (that's you!) 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.

In your mentor list, the "background check status" column shows whether a mentor has an updated background check or not.

As a team leader, you have the ability to order a new background check for the mentors on your team that meet ACE's requirements (above). To do this, go in to the mentor's profile to the "Sterling Volunteers" section. If the background check status is "expired," or "N/A," that means there is no current check on file, and you are able to send an invite to that volunteer (if they meet the above requirements). This will initiate a unique email invitation from the Sterling Volunteers database to the mentor. When the mentor follows the link in the email, their background check will be connected back to their ACE profile through an API with Sterling Volunteers. Typically, it takes several days for the check to complete. Below are the different statuses:

- **Eligible**: cleared to mentor for 3 years from effective date
- **Not Eligible**: failed background check. This person should not be permitted to participate in ACE. Please talk to your affiliate leaders with any issues.
- **Open Invitation**: Email invite has been sent but mentor hasn't completed background check application.
- **Expired**: Background check is older than 3 years. You should have the option to send another invitation.
- **In Progress**: background check is underway and results should come in soon.
- **N/A**: default status for new mentors with no previous background check records

In some cases, a mentor's email provider doesn't accept the email invitation from Sterling Volunteers. If you have a mentor who says they did not get the email invite, you can find the same *unique link* from the email in the mentor's profile under "URL," or "Volunteer URL is." You can send this link directly to the mentor.

BACKGROUND CHECK THROUGH STERLING VOLUNTEERS

Type: Background Check Renewal
Status: Open Invitation ⓘ
Requested By:
URL: Link ⓘ
Request Date: 10-06-2022
Effective Date: N/A
Expiration Date: N/A
Description: Your request has been sent successfully, Volunteer URL is
https://app.sterlingvolunteers.com/verify?id=PHKCNFMQIOTEQNKREIB

7. Exporting Team Info

Team leaders also have the ability to export team info. For a quick export of team contact info, there is a blue button at the top right corner of the team page, labeled: "Export Team Contact Info."

However, if you want to search/sort for more detailed info, you have the option to download a CSV file within your student and mentor lists. This query will pull from all registration fields. To do so, look for

the blue button at the top of your student list and another at the top of your mentor list. From there, you can select any field you'd like to download.

*Please keep in mind that ACE is very protective of our mentor and student personal data. We have provided team leaders access to this info to help you run your team more efficiently and provide a better quality experience for your students and mentors. We trust that you will exercise good judgement and extreme caution in what info you pull from the database and how you use it. **Please do not share or print participant contact info under any circumstances**. Anyone who has access to this info must have a current background check on file.*

8. FAQs

Can someone be a team leader for more than one team?

Yes. The database administrator can assign a mentor as team leader for any number of teams. This feature might be useful for mentors or regional leaders who oversee more than one team.

Why can't I see a registered student on my team list?

Because either the student hasn't registered yet or they have registered but your affiliate's database admin hasn't yet assigned them to your team. First make sure your student has registered. If so, reach out to your database admin to request the team assignment.

Why can't I edit a student's consent form or program status?

Until a student completes his or her registration, admins and team leaders cannot make changes to their profile. They student must "complete" their registration before being allowed to participate in ACE. If the student is having trouble completing their registration, please reach out to your affiliate admin.

Why can't I assign students to my team?

In order to assign students to a team, an admin needs full access to all the records in your affiliate's database. Since team leaders are only permitted to view members of their team, they do not have access to the entire database. If you have a student or mentor who needs to be assigned to your team, please contact your affiliate administrator.

Why does a team member show up twice on my team list?

This is because they registered twice for this program year. Please let your affiliate admin know about this so they can work with the national admin to delete the duplicate record. Otherwise your affiliate will get charged twice for insurance fees. If they are a mentor, duplicate profiles could result in double background check fees for your affiliate.