ACE MENTOR PROGRAM
ARCHITECTURE • CONSTRUCTION • ENGINEERING

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

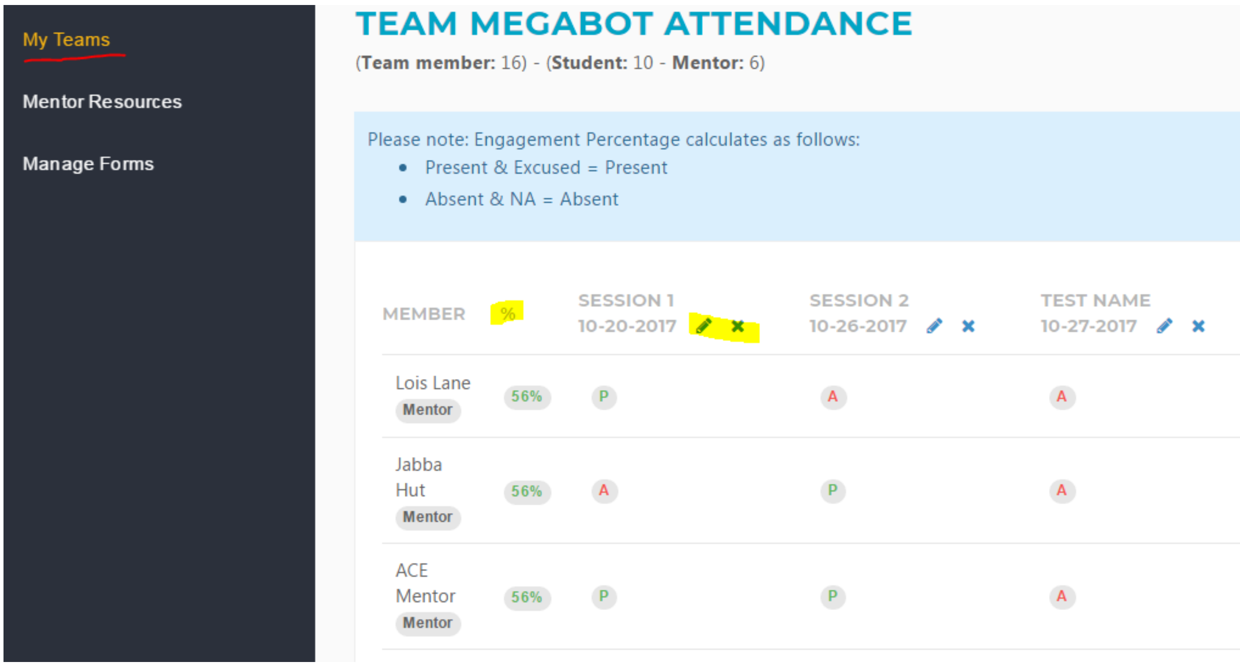
To access the team section, login to your mentor profile in the ACE database and go to "My Teams" in the left-hand column in your profile and find the team you would like to manage. If you have been assigned as the team leader, the "manage team" button will be available. This will take you to your team 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 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'd would like to track your team's attendance. Sessions can be created in advance or retroactively.

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 mark mentors and students present, absent or excused. 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 “absent”** for that session.



You can also edit existing attendance records. 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 registers after attending several sessions. While ACE discourages students from participating before registering in the database, we know it happens. After a student registers and is assigned to your team, you will now see them in the attendance record. You can go back to previous sessions and mark their attendance retroactively. And please remember to get all your students to register as early as possible in the program year, preferably before the mentor sessions start.

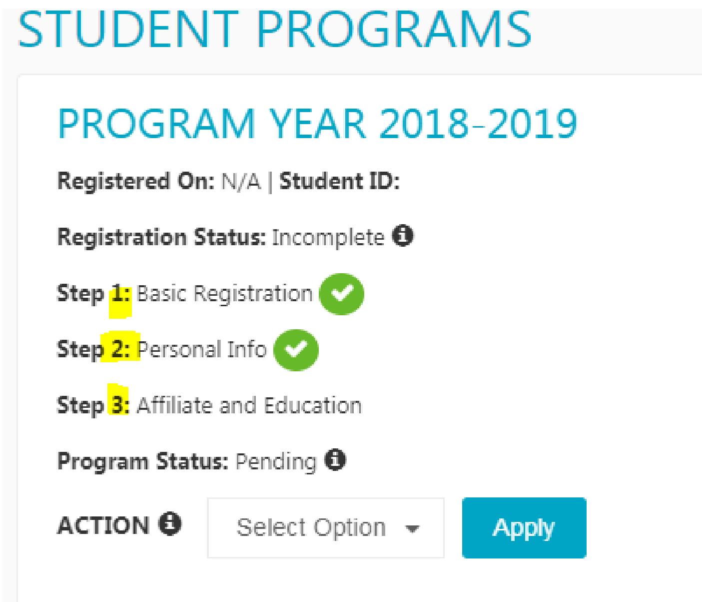
4. Managing Student Registration and Parent Consent Forms

Completing Registration

In order for students to participate in ACE, they must have a **complete registration** and **parent 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 a parent consent form either digitally or by hand. If a student doesn’t complete their registration, you as the team leader are unable to edit their profile; so making sure they complete all 3 registration steps is essential.

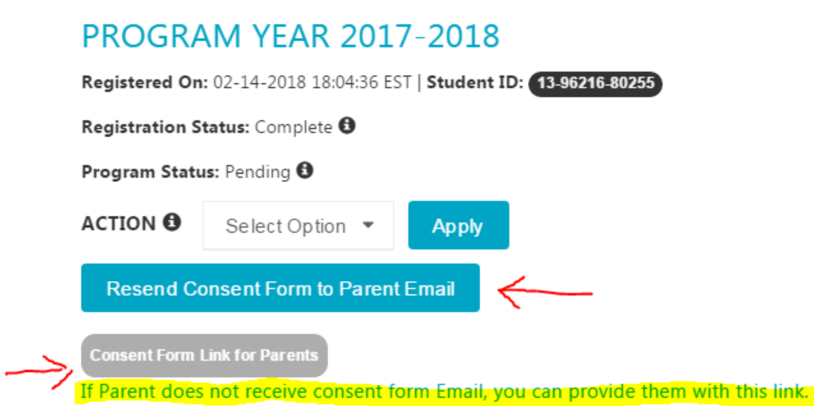
In the main student list, you can see which students have a “complete,” or “incomplete” registration status. Please reach out to those students who are “incomplete” and encourage them to complete all 3 registration steps.

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:



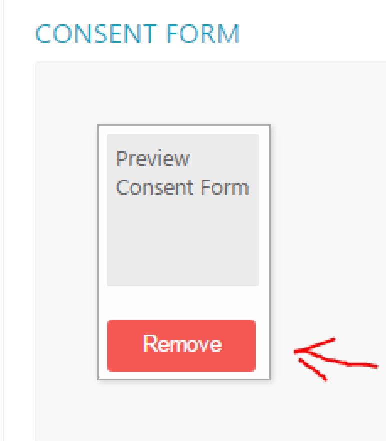
Parent/Guardian Consent Form

Another column in the student list is “parent consent form.” After completing registration students are given the option to complete a digital or paper consent form. The digital form requires a parent email address to send the parent an invite to complete their portion of the consent form. If the student has a form on file but has an “incomplete” consent form status, this means we are still awaiting a parent signature on the form. As a team leader, you can re-send the email invite to the parent or copy a link and email the parent directly. In some cases, the parent’s email provider does not accept the email from our database, in which case the direct link will come in handy:

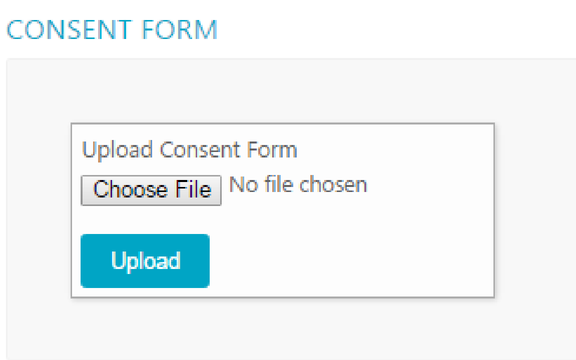


Students who opt to upload a manual form are sent down a different path. They are given the option to download, print, sign, scan or photograph and upload the form back to their profile. If they complete their registration, you as the team leader also have the ability to upload a scanned form for them. This option also works for those teams that provide paper copies of the consent form to students.

Additionally, if (for whatever reason) a student that started the digital form process decides they want to submit a paper form instead, you can click “remove” next to their incomplete consent form in their profile, and then upload the scanned file. Students can also do this from their profile:



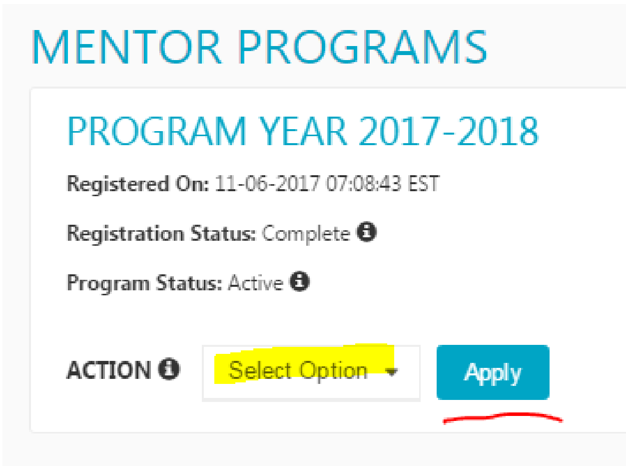
Clicking “remove” unlocks the form upload feature:



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, 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 old database, 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:

- **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” in order to be able to apply for scholarships and take advantage of other ACE opportunities like summer camps and internships.

6. Mentor Background Check

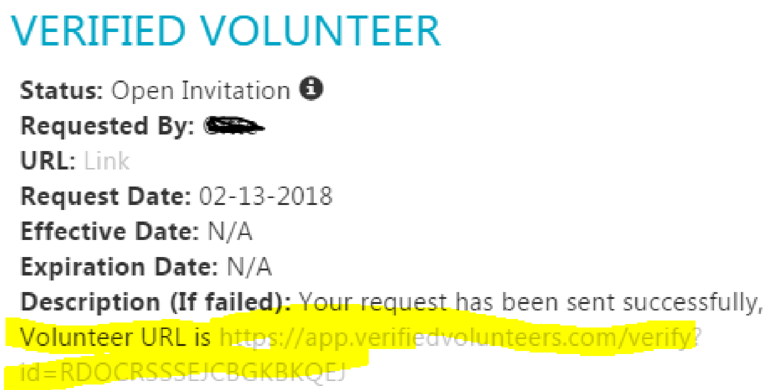
Before managing the background checks of the mentors on your team, check with your affiliate database admin. They may want to manage the background checks for the entire affiliate on their own. If more than one person is ordering checks at the same time, more than one check could be ordered for the same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

As you know, all active mentors must undergo a background check (through Sterling Volunteers) every 3 years to be eligible to participate in ACE. 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. 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 can hit the “Order Background Check” button. 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
- **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.



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 results in double background check fees for your affiliate.