ACE MENTOR PROGRAM
ARCHITECTURE • CONSTRUCTION • ENGINEERING

Affiliate Database Administrator Guide

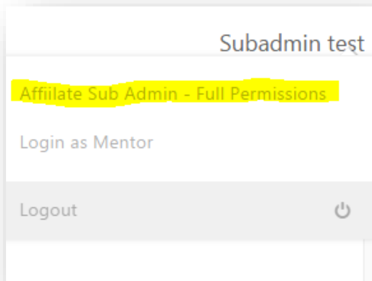
1. Intro

Every ACE affiliate should assign **at least one person 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 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 must undergo a background check, updated every 3 years, through Sterling Volunteers, ACE's background check provider.

2. Gaining Sub-Admin Access to the Database

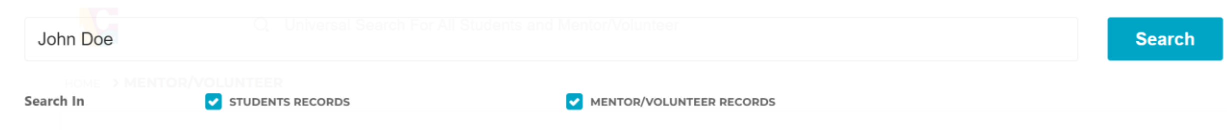
1. Login to your ACE Profile. If you don't have a profile, create a new volunteer profile.
2. Register for the current program year as a mentor/volunteer. Select "database administrator" in the role section (along with all other relevant roles) of the registration and complete the mentor training.
3. 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:



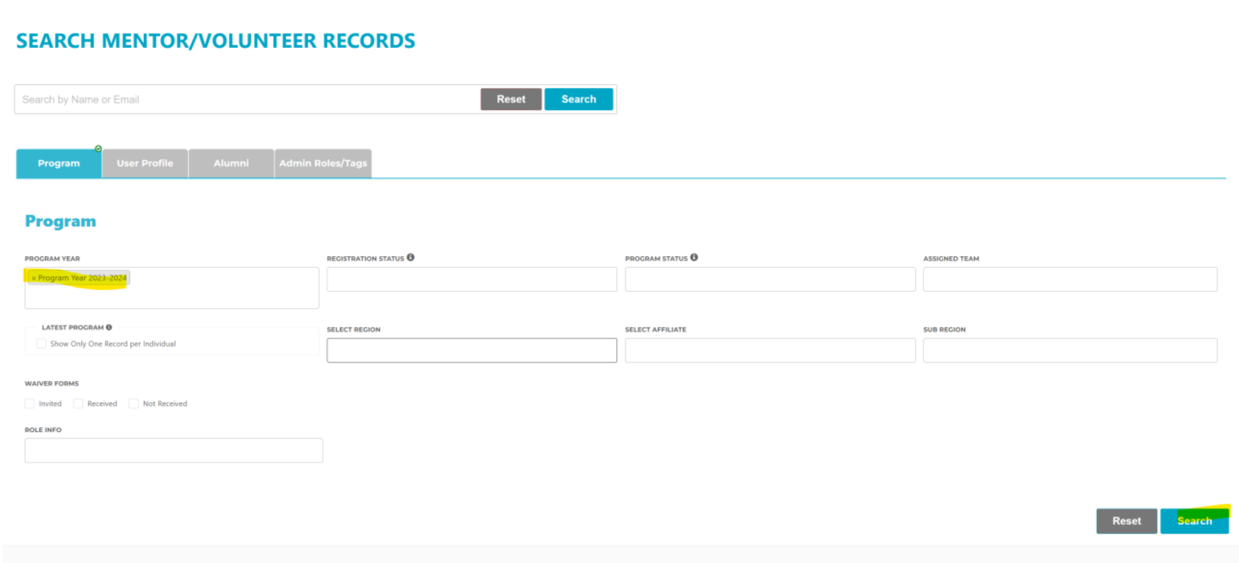
3. Student and Mentor Search

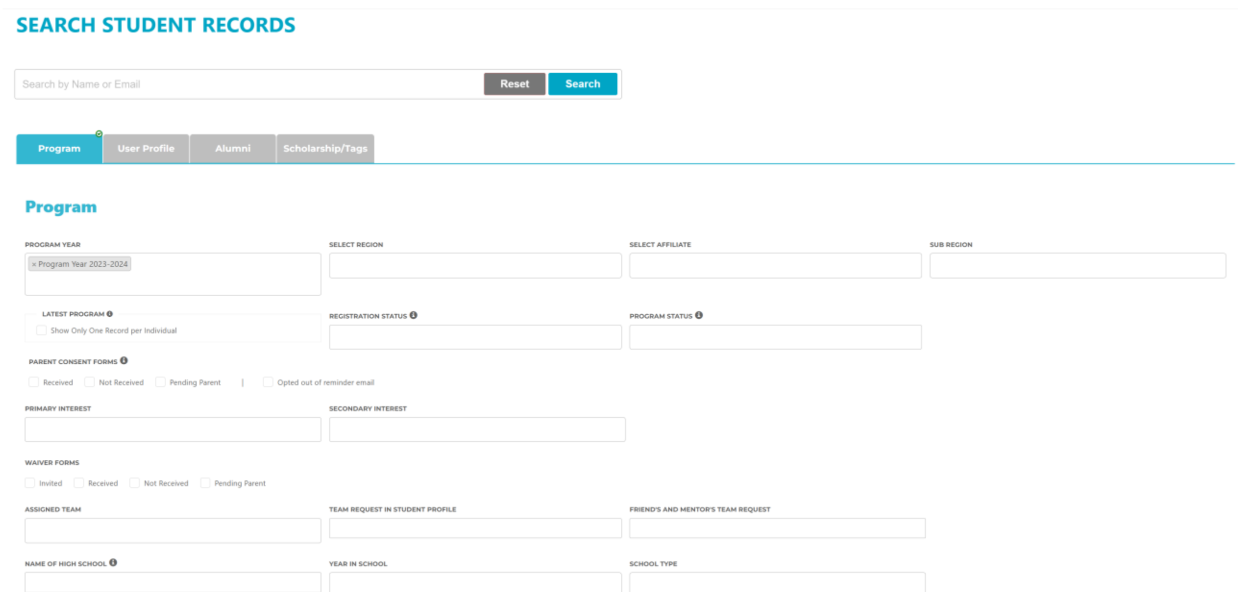
The student and mentor search pages are perhaps the most important and powerful aspects of the database. You can search any number of fields to get your desired results. Furthermore, you can export search results, selecting only the fields you want to see in the export file.

The Universal Search for all students/alumni and mentors/volunteers is available to search for someone using their name or email address. This will pull all the registrations related to your search terms, so you can quickly access the information you need.

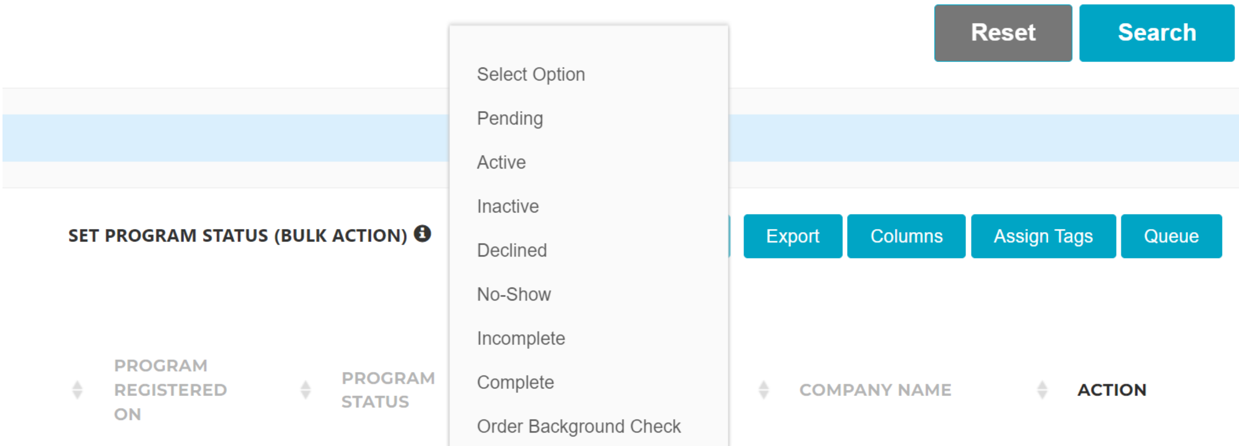


There is also the option to search using the **Student or Mentor/Volunteer search** options. This section allows you to search by one or more fields. The search is set to default to the **current** program year. If you want to search in a **past** program year, make sure it is selected in the "Program 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 blank. You can **search using a combination of** by adding a selection in their dropdown menu. You can also select criteria from other tabs, including User Profile, Alumni, Scholarship/Tags (student) and Admin Roles/Tags (mentor).

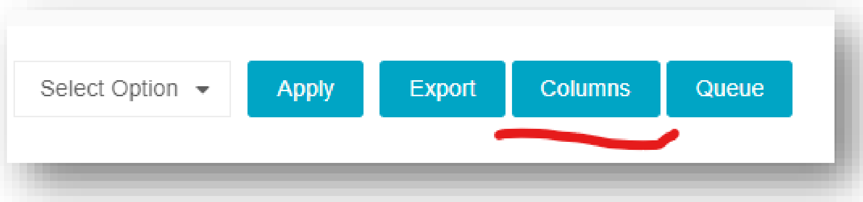




Bulk editing is a time-saving feature of the database. In the search results table, you can update the program status of multiple student/mentor profiles all at once. For mentors, you can also send bulk background check invites.



Custom Search Results Columns - The column select feature allows you to determine which search results fields you would like to see based on the specific search you are running, and reduces the need to export. Keep in mind that if you select more than a few fields, you may have to use the scroll bar to view all columns.



Custom Tagging
Feature - The custom profile tagging feature is unique to each affiliate. This allows database administrators the ability to create custom tags and assign them to both student and volunteer profiles. It is searchable and exportable. This feature has many potential organizational uses, such as tracking which participants are vaccinated, shoe or clothing sizes, or anything else not covered in the existing database fields.

The full list of affiliate tags can be managed in the “Manage Tags” tab on the left column. Here you can add new tags and search and manage existing tags. From the student and volunteer search pages, you can use the search features to see which profiles have been assigned which tags as well as bulk-assign tags from the search results.

One thing to keep in mind is that when tags are assigned, they are connected to **a specific program year** registration. This allows searching within a program year. However, returning participants’ tags **will not** carry over from one year to the next, so they must be re-assigned if you want them to appear in a search in subsequent program years.

Search Page Highlights -

- **Alumni & student search** You can search and edit ALL alumni data fields along with existing data from the alumni student records. So you can cross reference demographic, program status, team, and other student info with alumni data. Keep in mind that searching alumni across multiple program years will yield duplicate records for the same alumnus (for every year they

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participated) – if you only want to see one result please select "Show Only One Record per Individual."

- **Search pages** . The search criteria is split into tabs and sub-sections, organized by category, designed to help you better locate the criteria you want search. When you have made one or more selection in a tab, that tab will be highlighted to help you keep track of which sections you have altered. The alumni profile search is also available in one of these tabs.

4. Student Registration & Parent/Guardian Consent Form

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 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 two separate parts of the process. 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. If an incomplete registration is not completed within a month after it is started, it will be deleted by the system.

3 Registration Steps:

1. Basic Info (new students create profile & returning students login to existing 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.

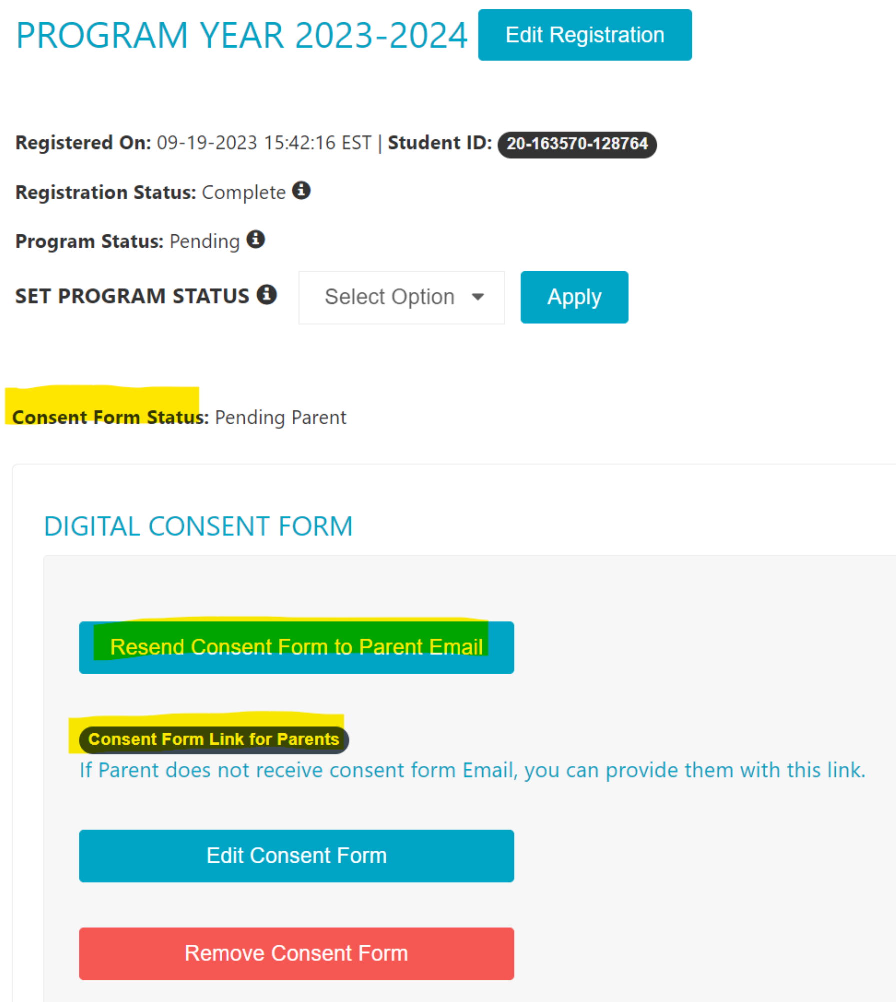
b. Parent/Guardian Consent Form

The next requirement that must be fulfilled is submission of a signed and completed parent/guardian consent form. **Without a parent/guardian consent form on file, the student is not approved to participate in ACE**.

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 has been phased out**, so all students will need to complete the digital form. We expect this change to result in a 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.

When the student signs and submits their portion of the online form, an email is automatically sent to their parent/guardian's email address, and reminder emails will follow until the form is complete.

The database administrator and student 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 Definition:

Each stage of the process is represented by a different **status**, which is searchable in the database. 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.
- **Received** = Both student and parent/guardian have completed the form. Student is eligible to participate in program.

Medical/Allergy Info

The consent form collects important medial/allergy info from students and parents which integrates to the teams section (digital form only). 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 can sort and export this info from the team management section in the database.

Paper Form as a Last Resort

While students can no longer upload a paper form from their profile, team leaders and affiliate admins still have the ability to upload a paper form to the student profile from their admin account. While this is not the preferred method, this should be considered a ***last resort*** when the digital form does not work for a student/parent/guardian. Keep in mind that the medical/allergy info input on a paper form will only be searchable within the database if the admin **manually edits** the student's profile – another reason why the paper form is not preferred.

Registration Management

The best strategy for managing registrations/consent forms occurs when the database administrator and team leaders work together, using the registration and form statuses, 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.

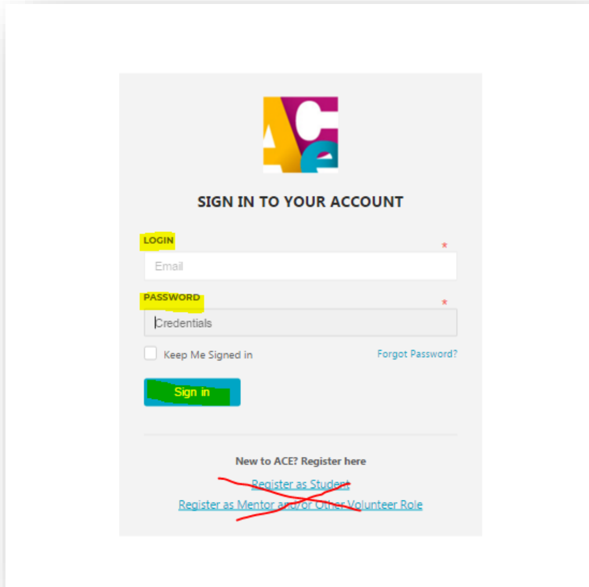
5. Mentor/Volunteer Registration

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, team leaders, 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 must **re-register every program year.**

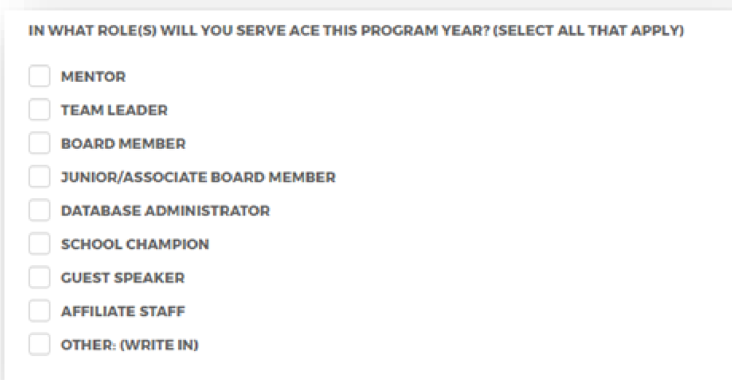
Returning volunteers should be instructed to **login to their existing profile when re-registering**. If they create a new profile, they will have **duplicate** profiles in the system. Their existing background check will not carry over to their new profile, and you will be double charged for a new background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



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. Incomplete registrations will be deleted by the system one month after they are started. 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.

6. 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 nice time saving feature.

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). Based on past program years, the average background check costs$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.**

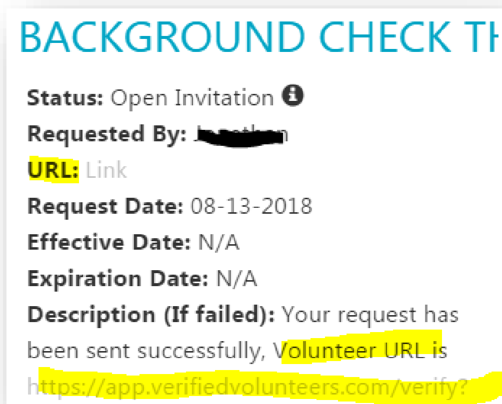
Now all volunteers you selected will receive an email invitation from Sterling Volunteers (not ACE) with a **unique link** to apply for a background check. Once completed, the background check application takes an average of one day to process (depending on jurisdictions checked). You can follow the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

- **N/A** – This is the default status. No action has been taken yet. If the volunteer doesn't meet the background check requirements, their status should stay N/A
- **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.



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 window of time 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.

7. Participant 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** – (*not received, pending parent, or received*) Have the student & parent/guardian successfully submitted the required consent form? This status defaults to "not received" before the student completes their part and moves to "pending parent" after the student signs but before the parent signs. Use these statuses to help you organize outreach to students & parents to get 100% consent form compliance.
- **2023 Program status updates** – (*pending, active, inactive, declined, no-show*) determined by individual's participation in ACE during the program year. This status is determined by the team leader and/or database administrator. Default setting is "pending." Students must be "active" to be eligible to apply for scholarships and other opportunities.
    - **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)
    - **Active*** – the student/mentor is actively participating in the ACE sessions
    - **Inactive** – Registered and attended at least one session, but fewer than 75% of ACE sessions and/or more than 3 unexcused absences (may vary by affiliate & team)
    - **Declined** – for whatever reason, the student/mentor is NOT eligible to participate (ie. Didn't meet age requirements, program over capacity, registered too late, etc.)
    - **No-Show** – Student/mentor registered, but did not attend any ACE sessions

    **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," "declined," and "no-show" profiles retain their assigned status.

    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.

    Because team leaders work directly with students and mentors, they also have access to set program status. 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 coordinate the management of participant 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.

8. User Management – Assigning Sub-Admin Permissions

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." This role allows the scholarship reviewer access to the scholarship applications only, keeping the student profile hidden from their view.

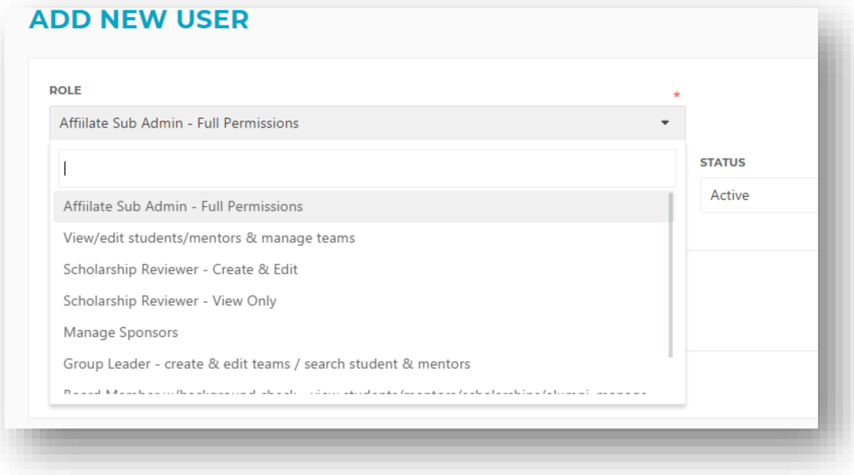
To view or assign roles, go to "**Manage Users**" in the left column. From here you can **view** your current sub-admins and see who is **active/inactive** and their assigned **role**. Users can only be assigned one role at a time. **Your list of sub-admin users should be reviewed regularly to ensure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

For more detail on the sub-admin roles, review this matrix of user role permissions. Make sure you opt to 'Enable Editing' to view the full explanation of each role by clicking on the header cell.

The list of available sub-admin user roles 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 **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.



You should also be aware of the background check policies related to database access. **Anyone with access to students' or volunteers' personal info must have a current background check on file**. Any sub-admin with an expired background check will no longer have access to participant profile data. Each user's background check status is visible from within the user management module to assist you in managing your sub-admins' background checks. Their access will be automatically restored when their new background check result is updated in the system.

9. Managing Affiliate Section

Setting sub-regions, affiliate description and managing documents.

When logged in as the "Sub-Admin Full Permissions," you have access to the "Affiliate" section where you have the ability to manage several key features. By setting sub-regions and writing an affiliate description, you can better organize your affiliate and also provide critical affiliate-specific info to program applicants at the time of registration. The required affiliate documents section allows us to safeguard important organizational documents that won't get lost with affiliate leader turnover.

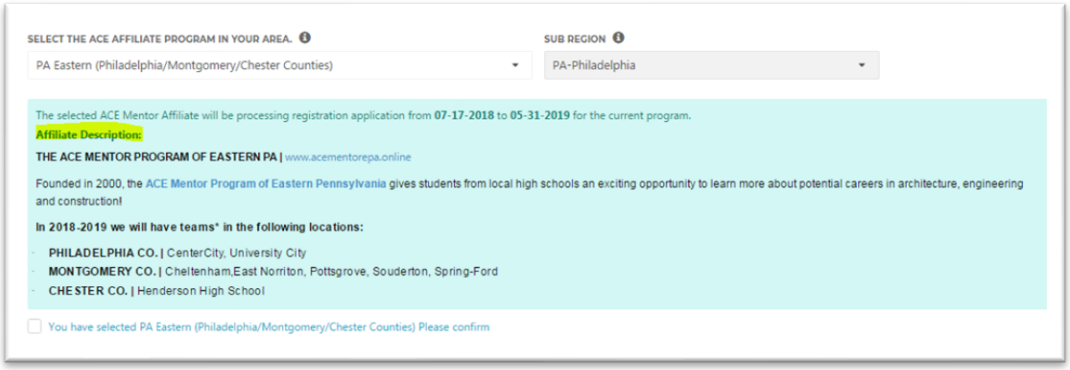
a. Sub-Regions

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

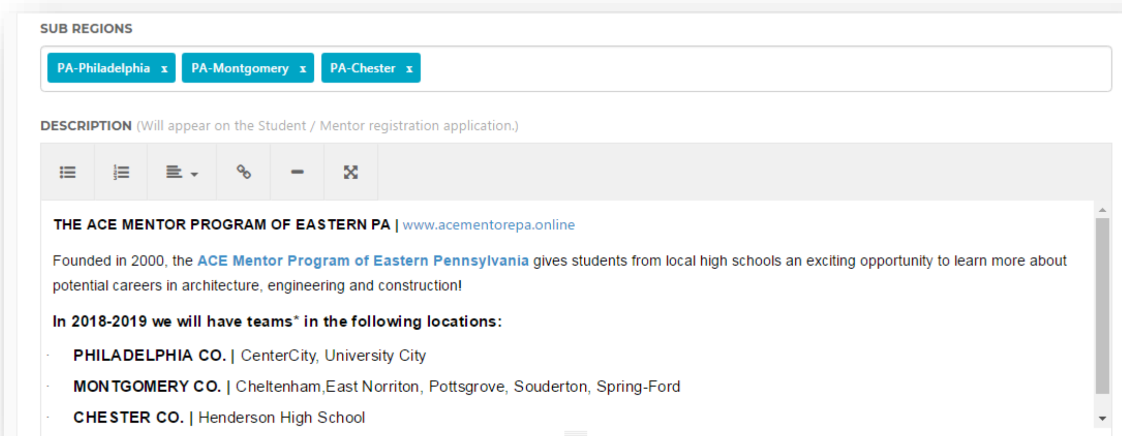
– for example, a link to your webpage, important program dates, or more details about sub-regions or teams.



Student view of Affiliate Description

c. Editing Affiliate Profile

To **add sub-regions** or an **affiliate description**, **select** "**Affiliate**" in the left column and then select "**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. 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.



Coming soon – We will be adding a way to hide old/outdated sub-regions without deleting them

d. Affiliate Compliance Documents

Every Affiliate is **required to have all updated compliance documents on file to be in good standing**. These documents are also accessible in the "**Affiliate**" section under "**Manage Documents**."

The compliance documents are organized here in two main categories: **Scheduled (Recurring)** and **Organizational (Permanent)** documents.

The '**scheduled'** category features documents that **need to be renewed or replaced** after a

SCHEDULED (RECURRING) COMPLIANCE DOCUMENTS

Documents under this group must be reviewed, updated, and filed annually (unless otherwise noted) with the state, federal government, and ACE Mentor Program of America (ACE National).

CATEGORY	EFFECTIVE DATE	TERM	STATUS	NO. OF DOCS	ACTION
Board of Directors	01-12-2020	N/A	Current	1	Latest Doc Manage
Annual 990/990N/990*	N/A	N/A	Current	1	Latest Doc Manage
State Filing	N/A	N/A	Outstanding	0	Manage
State Charitable Filing Renewal	N/A	N/A	Outstanding	0	Manage
Financial Statements	N/A	N/A	Outstanding	0	Manage
By Laws	N/A	N/A	Outstanding	0	Manage

ORGANIZATIONAL (PERMANENT) COMPLIANCE DOCUMENTS

Documents under this group remains unchanged after the initial legal registration with the state, federal government, and ACE Mentor Program of America (ACE National).

CATEGORY	EFFECTIVE DATE	TERM	STATUS	NO. OF DOCS	ACTION
Articles of Incorporation	N/A	N/A	Outstanding	0	Manage
State Registrations	01-10-2017	N/A	Current	2	Latest Doc Manage
EIN Confirmation Letter	N/A	N/A	Outstanding	0	Manage
Affiliate Agreement	05-06-2020	N/A	Current	1	Latest Doc Manage
State Charitable Registration (if applicable)	N/A	N/A	Outstanding	0	Manage
501c3 Determination Letter – (for the few affiliates not on the ACE group exemption)	N/A	N/A	Outstanding	0	Manage

OTHER RELEVANT DOCUMENTS

CATEGORY	EFFECTIVE DATE	TERM	STATUS	NO. OF DOCS	ACTION
Other Documents	01-01-2017	N/A	Current	1	Latest Doc Manage

specified amount of time (term), such as tax filings and by-laws.

The '**organizational'** documents, such as the affiliate agreement and articles of incorporation, are typically a **one-time upload** (no term). There is also a third category called **Other Relevant**

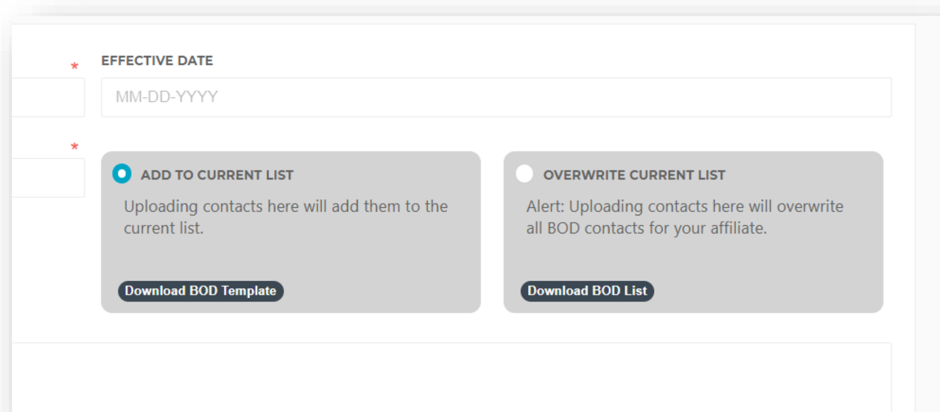
Documents. This is for important documents that are not required but your affiliate would like to safeguard along with the required compliance documents. Examples include strategic plans, program reports, affiliate annual reports, etc.

The most updated version of all required compliance documents should be stored in the appropriate field in the compliance section. You will see that some documents have a 'term' set for a particular period of time. When the term on a document is over, that document will become '**outstanding'** and you will need to **upload the updated version** to remain in compliance.   If you are missing a required document, work with your board of directors and regional director to make sure you have a plan to locate it and get it uploaded. For more detailed compliance information, visit the [ACE Tools site's compliance section.]

Board of Directors (BOD) Lists – Within the 'Manage Documents' section, you also have the ability to **upload and manage a current affiliate Board of Directors list**. Each affiliate must keep this section updated with any changes to their BOD soon after new members join and outgoing members leave. **This is the affiliate BOD list of record and is a required compliance item.**

To manage your list, go to "**Manage Affiliate**," and then "**Manage Documents**," and select "**Manage**" in the Board of Directors section. In the gray "**Add to Current List**" box, you will find the **BOD list template**. This is a pre-formatted .csv file that has all the required BOD list fields in the correct order. When you **fill in the BOD Template** with your board members' info and then select the blue "**upload**" button, your current BOD list will now appear in the dashboard.

When changes need to be made, you can either upload a new .csv template to overwrite or add to the exiting list or add/remove members one-at-a-time from the dashboard. You can also export your current BOD list at any time.



Keep in mind that this BOD list is **separate** from any of your BOD members who may have registered as volunteers. These records are not connected to volunteer profiles.

10 . Managing Teams

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
	Robert Juliet	Los Angeles	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	07-10-2018	Completed	
	Test Test	chicagoi	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	07-17-2018	Pending	
	Pauly D	Las Vegas	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	N/A	Pending	
	Johny Bravo	asdad	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	N/A	Pending	
	Andrew Johsin	jkhjkhlk	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	07-17-2018	Pending	
	Johny Bravo	Chicago	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	07-17-2018	Pending	
	Ted Tester	Chicago	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	07-11-2018	Completed	
	Chevy Chase	Las Vegas	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	N/A	Completed	
	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.