

Affiliate Database Administrator Guide

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1. Intro

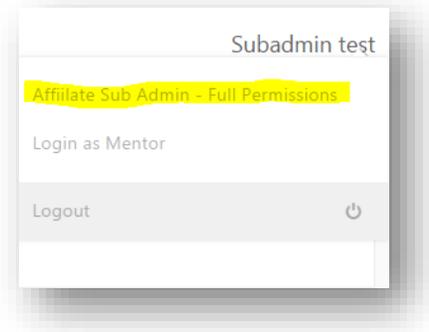
Every ACE affiliate should assign **at least one person to manage its database**. These individuals are responsible for managing registrations, creating and assigning teams, administering background check invitations, uploading affiliate compliance documents and more. The affiliate database administrator 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.

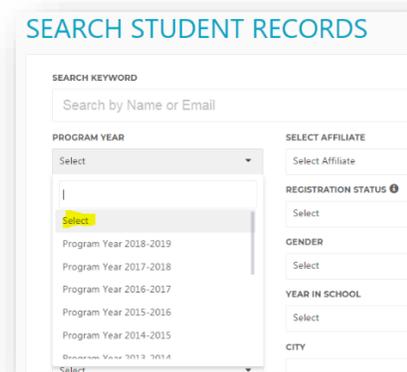
2. Register for the current program year as a mentor/volunteer. Select “database administrator” in the role section (along with all other relevant roles) of the registration and complete the mentor training.
3. Notify your regional director that you have successfully registered and he or she will invite 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 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.” You can also **search more than one selection** in the following fields: **Program Year, Program Status, and Volunteer Role** Info by selecting 2 or more options from the drop-down.



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 - In 2021, we added the column select feature to the search results area. This 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.



4. 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 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)
 - 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 (preferred) 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. Before the parent completes the form, the student's consent form status is "pending parent." The parent must then complete the fields on the form, sign and submit. When complete, the student's consent form status will update to "received."

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. This URL is unique to that student's profile and should not be shared with anyone else but that student's parent/guardian.

STUDENT PROGRAMS

PROGRAM YEAR 2018-2019

Registered On: 08-15-2018 13:29:34 EST | Student ID: 14-38208-81685

Registration Status: Complete ⓘ

Program Status: Pending ⓘ

ACTION ⓘ Select Option Apply

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.

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.

Medical/Allergy Info – The consent form collects important medical/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.

Please note that the **paper form upload option is NOT integrated with the database** like the digital form. Any crucial medical/emergency contact info must be manually entered by a team leader or affiliate admin. When a student submits a paper form, please review it carefully for any medical info you should be aware of. **To enter the info manually**, go to the top right corner of the student's profile where it says "ACTION," and click "select option." Select "edit user," and hit the blue "Apply" button. Now scroll down to the Emergency Contact and Medical Conditions fields and fill in the medical/emergency contact info in the appropriate fields. This info is now visible in the student profile and searchable and exportable.

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

ACE

SIGN IN TO YOUR ACCOUNT

LOGIN

Email

PASSWORD

Credentials

Keep Me Signed in [Forgot Password?](#)

Sign in

New to ACE? Register here

~~Register as Student~~

[Register as Mentor or Other Volunteer Role](#)

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. 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 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.

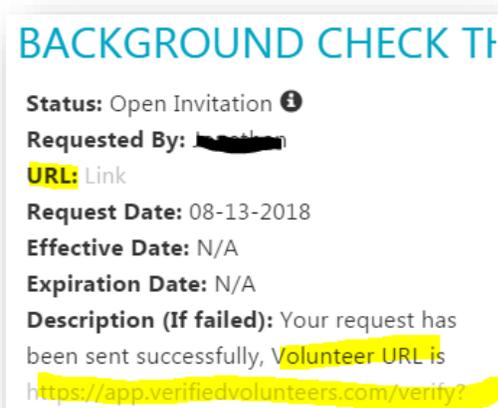
Now all volunteers you selected will receive an email invitation from Sterling Volunteers (not ACE) with a unique link to apply for a background check. Once completed, the background check application takes an average of one day to process (depending on jurisdictions checked). You can follow the mentor/volunteer's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

- **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.
- **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.

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

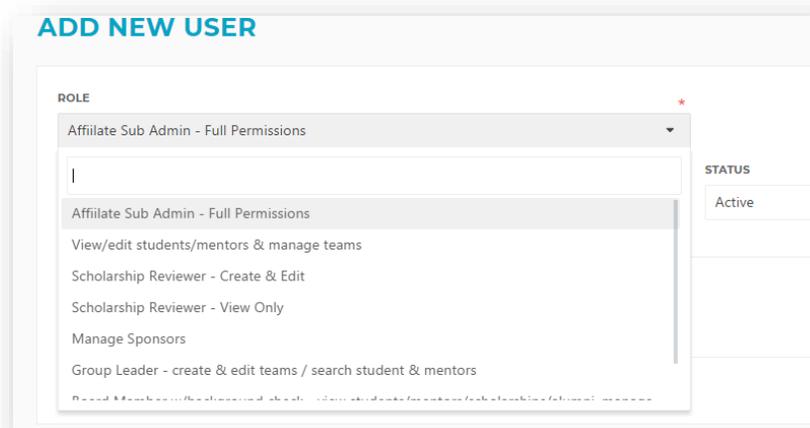
As the database administrator, you can assign various database sub-admin roles to anyone with an active mentor/volunteer profile in the database. This powerful feature allows us to protect sensitive student and mentor data while giving multiple users only the info they need to do their job. For example, 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.



The screenshot shows a web interface titled "ADD NEW USER". It features a "ROLE" dropdown menu with a search bar and a list of roles including "Affiliate Sub Admin - Full Permissions", "View/edit students/mentors & manage teams", "Scholarship Reviewer - Create & Edit", "Scholarship Reviewer - View Only", "Manage Sponsors", and "Group Leader - create & edit teams / search student & mentors". To the right of the dropdown is a "STATUS" section with an "Active" button.

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.** As of 2021, any sub-admin with an expired background check will no longer have access to participant profile data. Each user's background check status is now 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.

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:

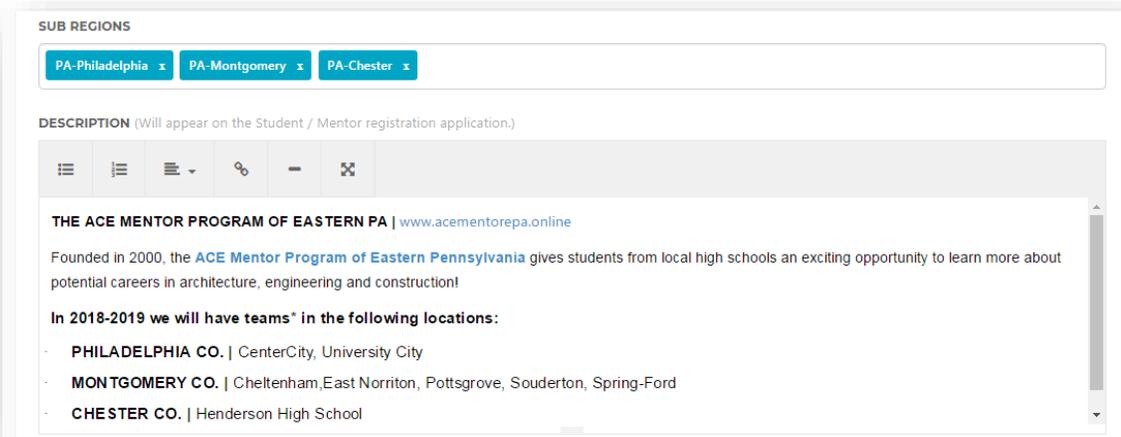
- PHILADELPHIA CO. | Center City, University City
- MONTGOMERY CO. | Cheltenham, East Norriton, Pottsgrove, Souderton, Spring-Ford
- CHESTER CO. | Henderson High School

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

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.



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 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

SCHEDULED (RECURRING) COMPLIANCE DOCUMENTS					
<small>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).</small>					
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					
<small>Documents under this group remains unchanged after the initial legal registration with the state, federal government, and ACE Mentor Program of America (ACE National).</small>					
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
501(c)3 Determination Letter (for the few affiliates not on the ACE group exemption)	N/A	N/A	Outstanding	0	Manage

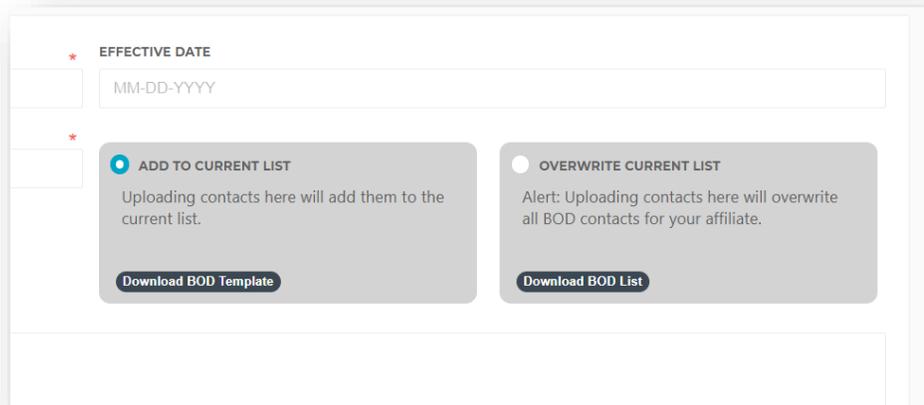
OTHER RELEVANT DOCUMENTS					
CATEGORY	EFFECTIVE DATE	TERM	STATUS	NO. OF DOCS	ACTION
Other Documents	01-01-2017	N/A	Current	1	Latest Doc Manage

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](#).

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 existing list or add/remove members one-at-a-time from the dashboard. You can also export your current BOD list at any time.



The screenshot shows a web interface for managing the Board of Directors (BOD) list. At the top, there is a field labeled "EFFECTIVE DATE" with a red asterisk and a placeholder "MM-DD-YYYY". Below this, there are two main options, each with a radio button and a "Download BOD [Template/List]" button. The first option, "ADD TO CURRENT LIST", is selected and includes the text "Uploading contacts here will add them to the current list." The second option, "OVERWRITE CURRENT LIST", is unselected and includes the text "Alert: Uploading contacts here will overwrite all BOD contacts for your affiliate."

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

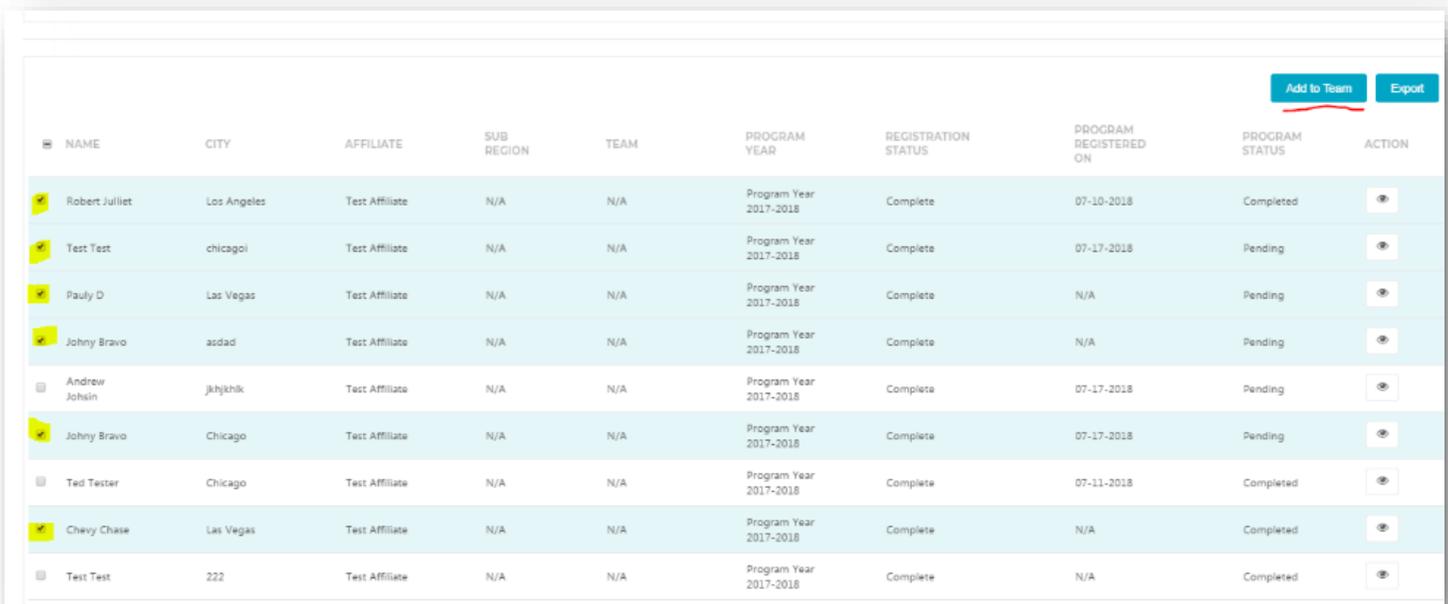
Because team leaders can only see members already assigned to their team, only sub-admins with access to all student and volunteer profiles can create and assign members to teams. Therefore, it is very important that your affiliate has a system in place for identifying which students and volunteers should 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.



	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"/>	Johny Bravo	asdad	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	N/A	Pending	
<input type="checkbox"/>	Andrew Johns	jkjkhk	Test Affiliate	N/A	N/A	Program Year 2017-2018	Complete	07-17-2018	Pending	
<input checked="" type="checkbox"/>	Johny 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](#).