Prospective Mentor Connector

A new platform designed to assist Recruiters in tracking and managing prospects throughout their journey to become a Mentor

Participant Packet

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Navigating this Document

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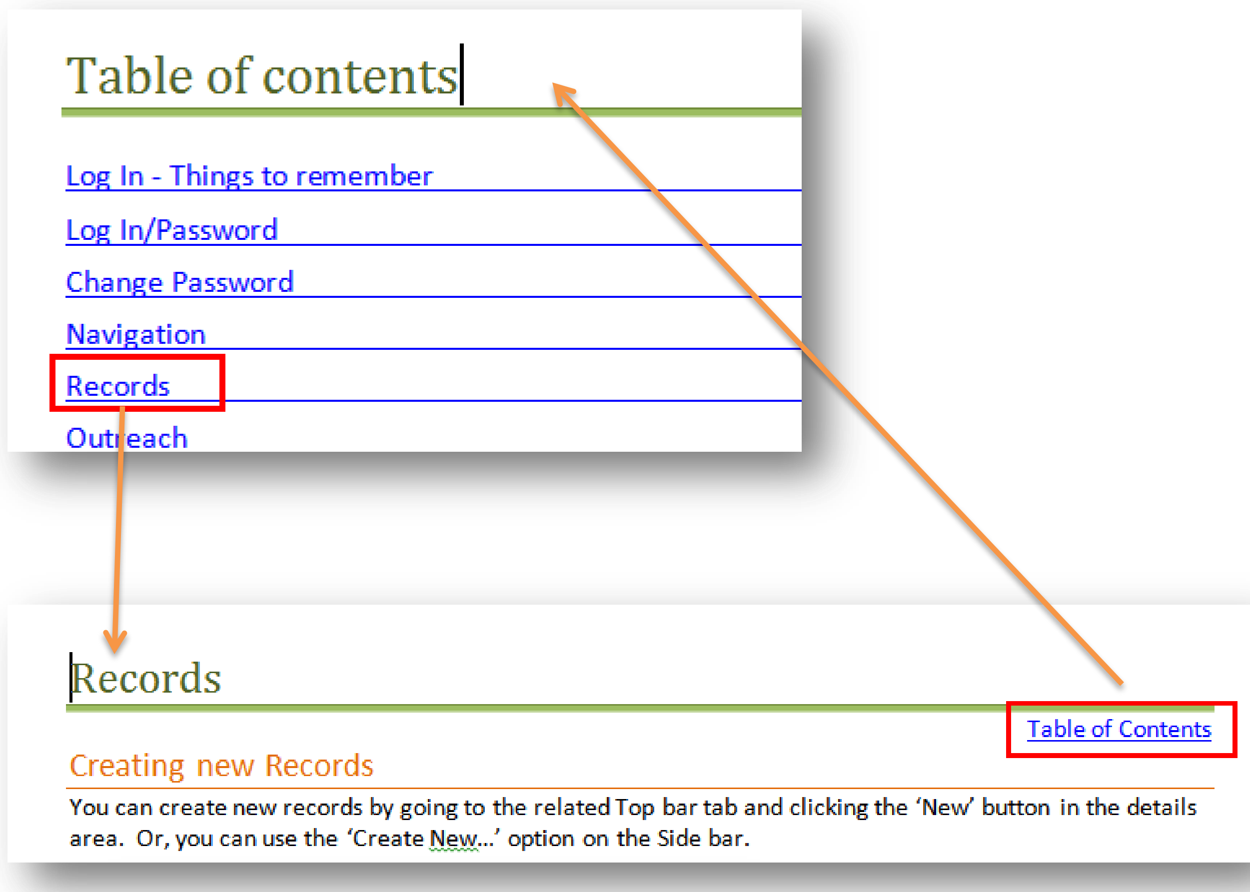
This document is made up of several sections and subsections of information. Major section headers are easily identified by large black text which is underlined in green, such as the "Navigating this Document" header above. Smaller subsections of information are easily identified by large orange text which is underlined in orange, such as the "Creating New Records" subsection of the "Records" section which is displayed in the example screenshot below.

For ease of use, a hyperlinked Table of Contents is provided as the first page of this document. Click on any link within this table to quickly navigate to any section of the document and learn more about the chosen topic. Each section also contains a quick hyperlink back to the table of contents in the top right-hand corner of the page.



About the Prospective Mentor Connector

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The Prospective Mentor Connector (PMC) is a web-based tool designed to assist Mentor Recruiters and Recruiter Managers in tracking and managing prospective Mentors (“**prospects**”) through their journey to becoming approved Mentors with The MENTOR Network.

The PMC relies on the Force.com technology platform, a product of Salesforce.com, one of the country’s leading developers of client relationship management (CRM) software. When combined with The Network’s new Mentor Recruitment Website during Phase I of implementation, the system will help recruiters identify, connect with and track prospective Mentors from first contact to approval. Recruiters will be able to use the system to:

- Manage prospective Mentor information in one centralized database
- Track the progress of each prospect through certain high-level “milestones”
- Set up reminders for tasks and outreach activities
- Measure the return on investment for activities and events
- Access robust, real-time reporting capabilities

The technology will be implemented in phases, and was designed with the flexibility to allow for additions and enhancements in the future. Even with all functionality available in Phase I, the system won’t meet all the needs of every program, particularly when it comes to tracking local milestones in the screening, selection and approval process. So, if there are milestones specific to your local program, it is it is important to continue to track those as you have in the past.

There are many possibilities for additional functionality in the future – additional automation options, development & tracking of local milestones, the addition of historical data, enhanced reporting capacity – and your suggestions will help inform future phases of its development.

Stage		
Inquiry	Screening and Selection	Approved Mentor
Prospect has inquired about MENTOR's services. MENTOR contacts them and provides an info packet. They are encouraged to attend an info session. The next goal is to have them submit an application to the local office	This stage takes the longest time, there are MENTOR and Local (Program/State) requirements. After the milestones are complete a manager will review the prospects information and approve them as a Mentor.	A Prospect has gone through screening and selection, a manager has reviewed the information and the prospect has signed the general provider agreement. Prospect has become approved.
Milestones		
Contact Prospect (Web leads)	**Attended Pre-Service Overview**	**Manager reviews and Approves Mentor**
Provide Info Packet	**Conduct Home Study**	
Attended Info Session	**Complete Background Check**	
Application Rec'd date	**Health Status Statement**	
Application Reviewed date	**Sign General Provider agreement**	

Internet Explorer 8 / Allowing Pop-up Windows

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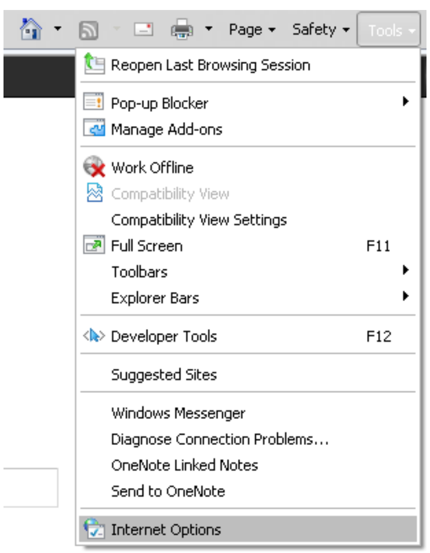
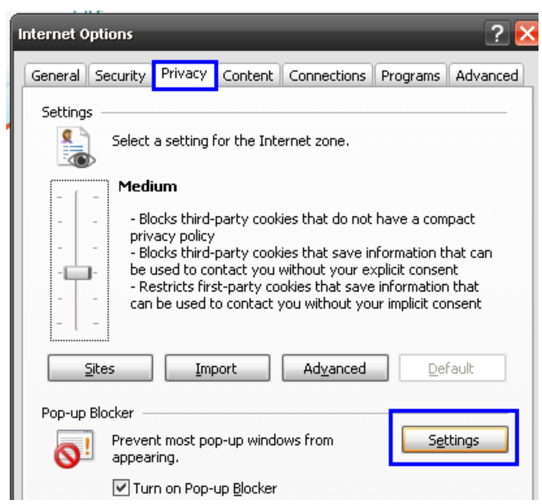
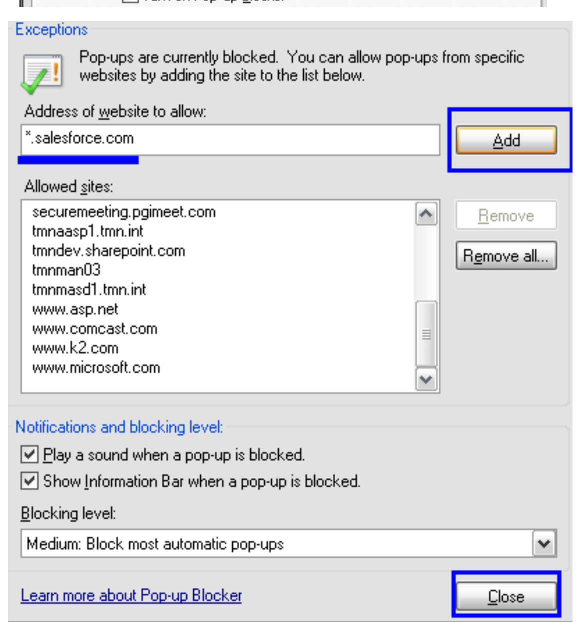
Internet Explorer 8 is needed to access the Prospective Mentor Connector. If you don not currently have this web browser installed on your computer you will need to contact the ITSC for upgrade assistance. Throughout the use of this application, pop-up windows may occur. Most notably this happens when you use reminders for custom tasks.

To allow pop-ups in Internet Explorer 8:

1. Open Internet Explorer 8
2. Select “Tools” -> “Internet Options” from the top menu bar
3. Click the “Privacy” tab
4. Click “Settings” in the section pop-up blocker
5. In the textbox for Address of website to allow
    a. Type ‘*.salesforce.com’
    b. Click the “Add” button
6. Click the “Close” button







Log In/Password Information

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Account Validation

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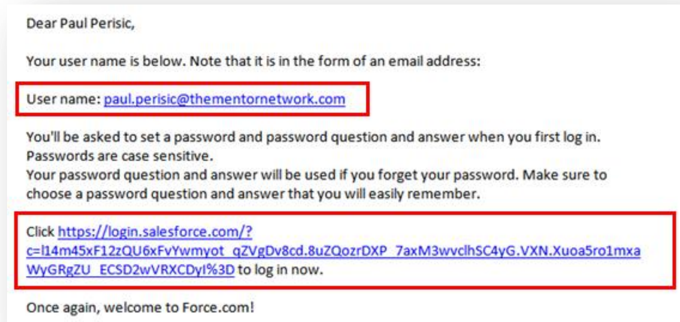
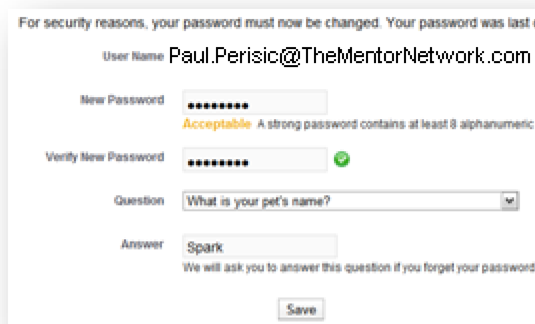
Once your account is created in the application an email will automatically be generated and sent from support@salesforce.com with the subject “Force.com Production: Salesforce.com password confirmation.” This email will contain your user name and instructions for validating your account.



Your user name will be same as your MENTOR Network email address: *FirstName.LastName@TheMentorNetwork.com*.



Once you receive the email, click on the hyperlink contained within, and follow the on-screen instructions to complete the initial setup process for your account, which includes setting a password and choosing a secret question and answer combination.

> ⚠ **NOTE:** This email may be delivered to your junk e-mail folder in Outlook and you may need to move it to your Inbox in order to be able to click the link provided to validate your account. For assistance with Outlook, please contact the Information Technology Service Center at: 1-888-774-4872 or email servicecenter@thementornetwork.com.

Passwords

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A password is a secret word or string of characters that is used for authentication, to prove identity or gain access to a resource.

- Use ***strong*** passwords
    - Strong passwords contain at least three of four of these elements:
        - Upper case letters
        - Lower case letters
        - Digits
        - Symbols (<space>!@#$%^&*()_+|~-=\`{}[]:";”<’?,./)
    - They are at least eight characters in length
    - They are not a word in any language, slang, dialect, jargon, etc., nor a simple “Leet” substitution (e.g., “Bro0klyn*Bridge”, “BaSe+BaLl07!”) for a word
    - They are not based on personal information, names of family members, friends or pets, significant dates (birth, anniversary, etc.), or related data
    - They do not contain any variant on “mentor", “network" or other common terms/knowledge related to our company or business

Important tips for creating and using passwords:

- Keep your password private. The sharing of user IDs or passwords to computing resources and information is prohibited.
- Passwords should never be written down.
- Passwords should be changed every 90 days.
- Privileged user passwords should be unique for each system.
- Passwords may not be stored on ANY computing resource (including BlackBerry devices, phones, etc.,) without password-protected access.
- Passwords must be immediately changed if they are compromised or disclosed, including situations where they are provided to members of the ITSC for support assistance.
- The same password may not be used for computing resources as well as for personal/public resources (e.g., personal email accounts, Facebook, etc.).

Logging in

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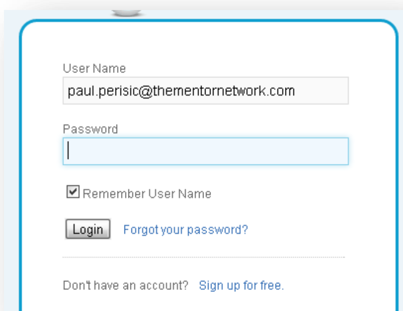
After you have completed the one time account validation process, you are ready to access the application using the following link:

https://login.salesforce.com

TIP: You may want to create a bookmark in Internet Explorer for the application so that you won't need to remember the web address each time you need to access it. You can do this quickly by pressing <CTRL>+<D> on your keyboard and then clicking the "OK" button in the bottom right-hand corner of the "Add to Favorites" dialog box that appears.



Changing your Password

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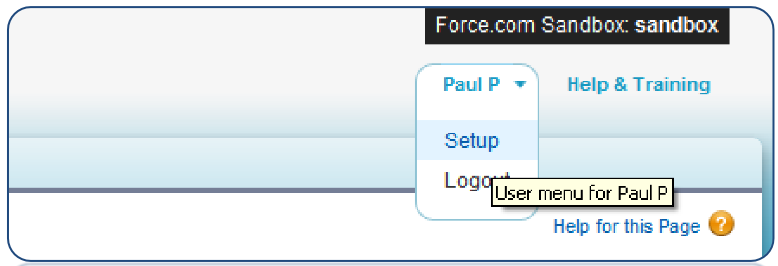
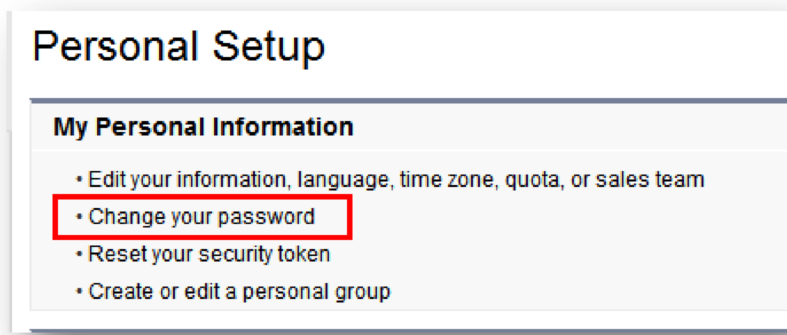
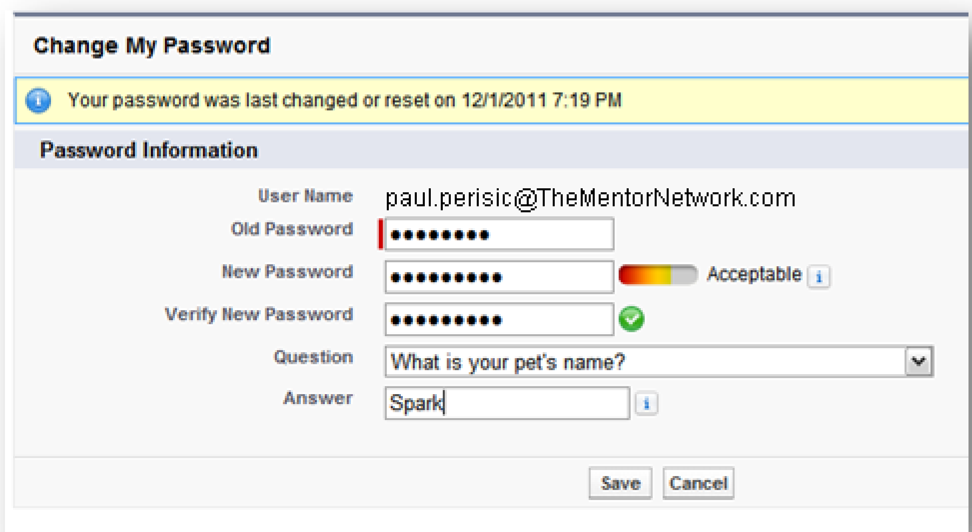
Once every ninety days you will automatically be prompted by the application to change your password. You can also change your password at any time by following the instructions outlined below.

To change your password:

1. Login to the application (see the “Logging In” section)
2. Click your name in the top right-hand corner of the screen
3. Select “Setup” from the drop-down menu that appears
4. Click the “Change your password” link under the “My Personal Information” heading
5. Enter your old password in the field provided
6. Enter your new password into the two fields provided
7. Click the “Save” button







Logging In – An Important Note

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If you're a user who will be logging into the system from multiple computers in different offices or locations you may need to revalidate your account the first time you try to connect to the application from a different location. This revalidation is based on the IP address of the router your computer is connected to.

The revalidation process works much like the initial account setup. You'll receive an email from Salesforce.com with a 5 character code that you'll be asked to input the next time you attempt to login. If you haven't received the email in a timely manner, be sure to check that it has not been delivered to your junk email folder in Outlook.

Your salesforce.com Activation Email

support@salesforce.com

Sent: Mon 1/9/2012 6:02 PM

To: Whalen, Michelle

Dear michelle.whalen@thementornetwork.com,

You have requested access to salesforce.com from an unknown device. Use the verification code below within 24 hours to activate this device.

Verification Code: 49102

IMPORTANT: If you have not requested to activate a device, or believe you have received this message in error, please contact salesforce.com support (support@salesforce.com) immediately.

What does "activation" mean? Should I activate this computer?

Activation helps reduce the risk of security issues related to login. Activating this computer helps salesforce.com recognize this computer when you use it to access salesforce.com. You should activate this computer if it is owned by you or your employer and you are confident it is free of malware.

Navigation

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The Top Navigation Bar

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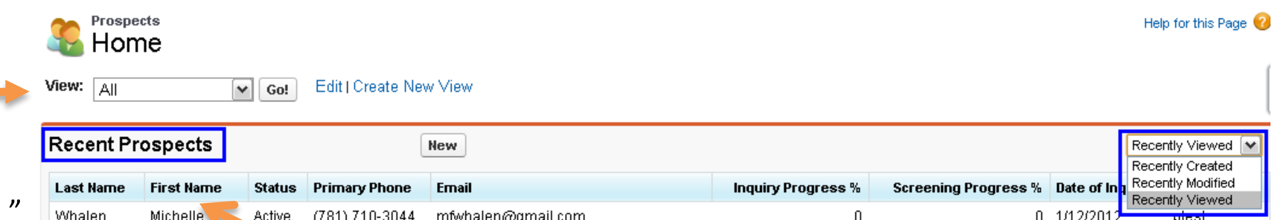
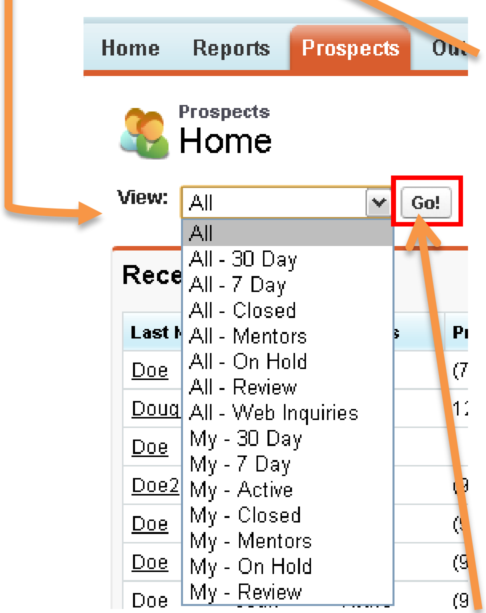
At the top of each page is a set of tabs which link to various areas of the application. By default, each time you login, you will automatically be brought to the "Home" tab.

Anytime you click on a tab you will be brought to a list of recent items. You can change your default recent view by using the drop-down menu in the top right-hand corner of the screen. The options are: "Recently Created," "Recently Modified," and "Recently Viewed."

”





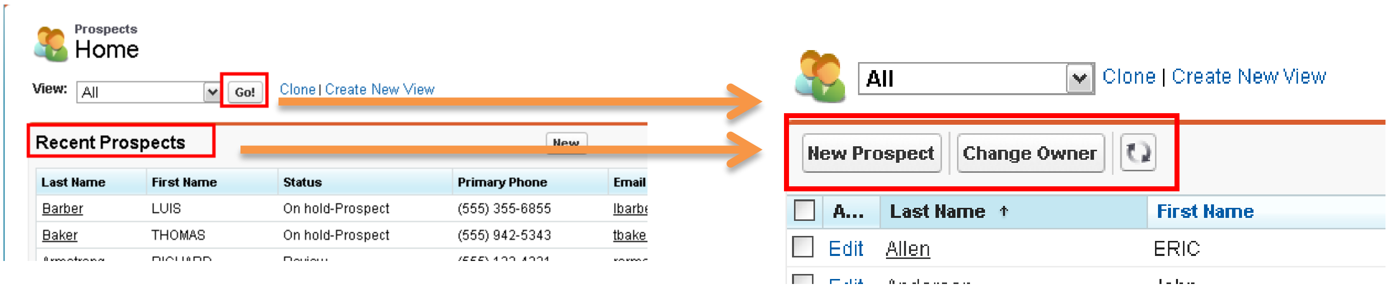
The example screenshots show the "Prospects" tab. Note the header at the top of the list Titled "Recent Prospects." In the Ad Campaigns/Event Types area, it will be titled "Recent Ad Campaigns/Event Types," in the Ad Placement/Event Specifics area it will be titled "Recent Ad Placement/Event Specifics."

The Reports area functions in a slightly different way. Reports are explained in more detail in the "Reports" section.

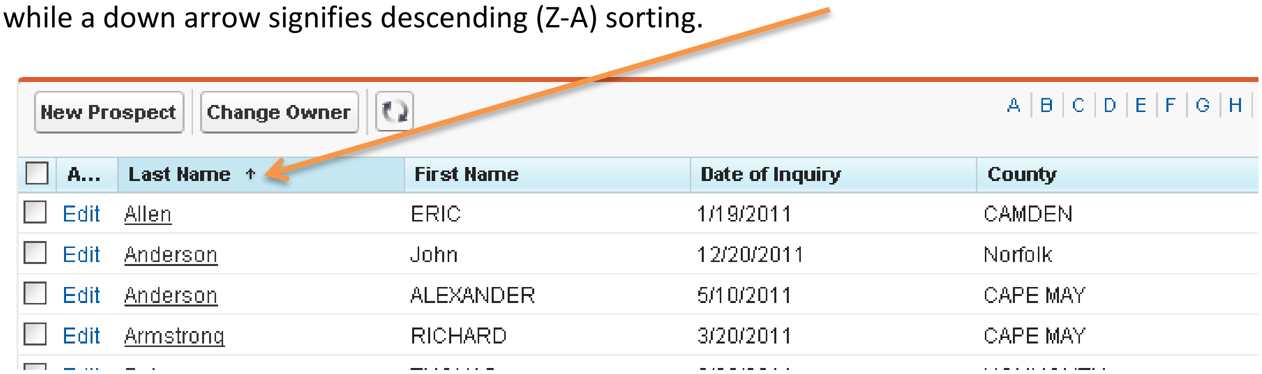
You may not want to view "All" records.
You can select a different view from the View drop-down in the top left-hand corner of the screen. Each view is explained in more detail in [Appendix A](#).

After you select the view you want, <u>remember that you MUST click the "Go!" button.</u>

After you click the “GO!” button the view will change accordingly and the top of the list will now include three additional buttons: “New Prospect,” “Change Owner,” and a “Refresh Record” icon.

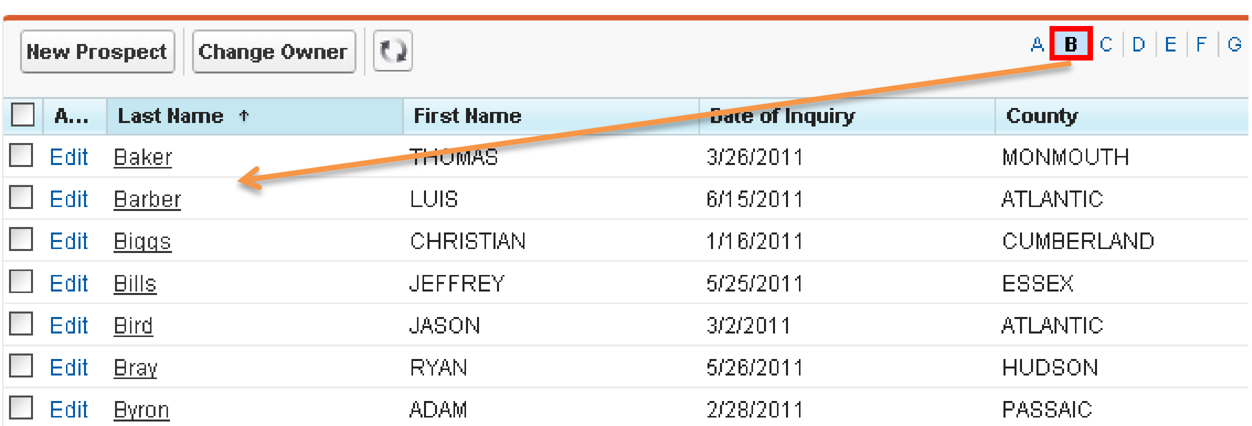


The record set that is returned is laid out in grid format. You can sort the records by simply clicking on any of the column headings at the top of the grid. The column heading with a slightly darker color and an arrow next to its name is the column the grid is currently sorted by. An up arrow signifies ascending (A-Z) sorting while a down arrow signifies descending (Z-A) sorting.



You can click on one of the letters in the top right-hand corner of the window to further filter the sorted column by first letter.

In the screenshot below, the “Last Name” field was clicked to sort the recording in ascending order, and then “B” was clicked to show only the prospects with a last name that starts with the letter B.



The Sidebar

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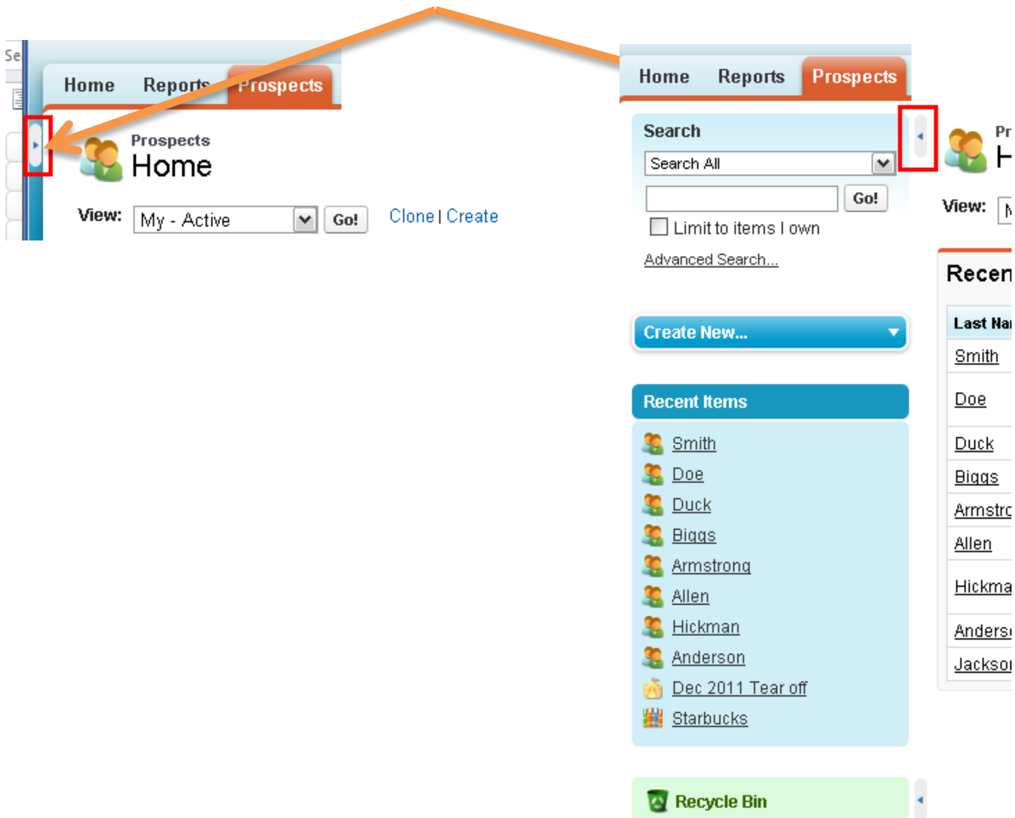
Most areas of the application also utilize a sidebar which can be accessed from the left-hand side of the window. This sidebar contains quick links the can be used to search, create new records, and list the records you recently viewed. The first time you login, the sidebar will be closed. You can click the arrow icon at any time to expand or collapse the sidebar. Once expanded, the sidebar will stay visible on subsequent logins until it is manually collapsed again.



Records

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Creating new Records

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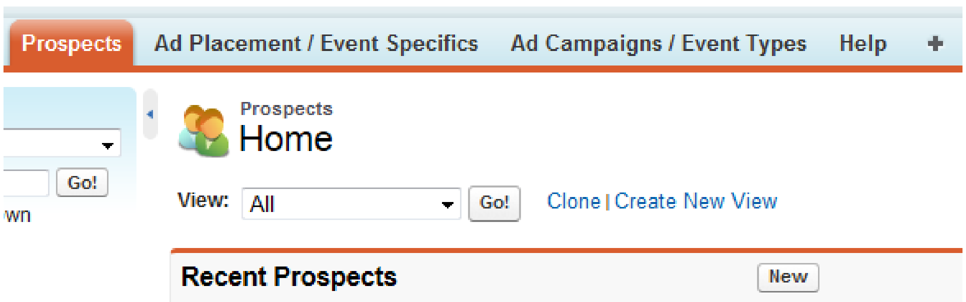
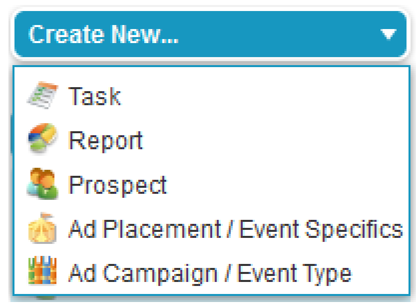
You can create a new record at any time by selecting the desired area of the application using the top navigation tabs, and then clicking the "New" button in the details area, **OR**, you can click on any of the options under the "Create New…" heading on the sidebar.





Record Sections

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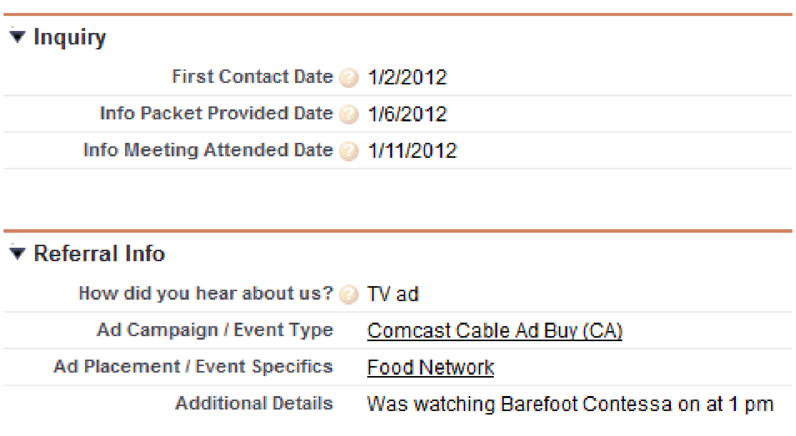
Some records will have sections that can be collapsed to hide information and save screen space or expanded to view information when needed. When a record section is expanded, an icon featuring a black arrow facing downward will be displayed. Click this arrow to collapse the record section. When a record section is collapsed, an icon featuring a right facing arrow will be displayed. Click this arrow to expand the record section. Record sections are always initially expanded by default.



Changing the Owner of a Record

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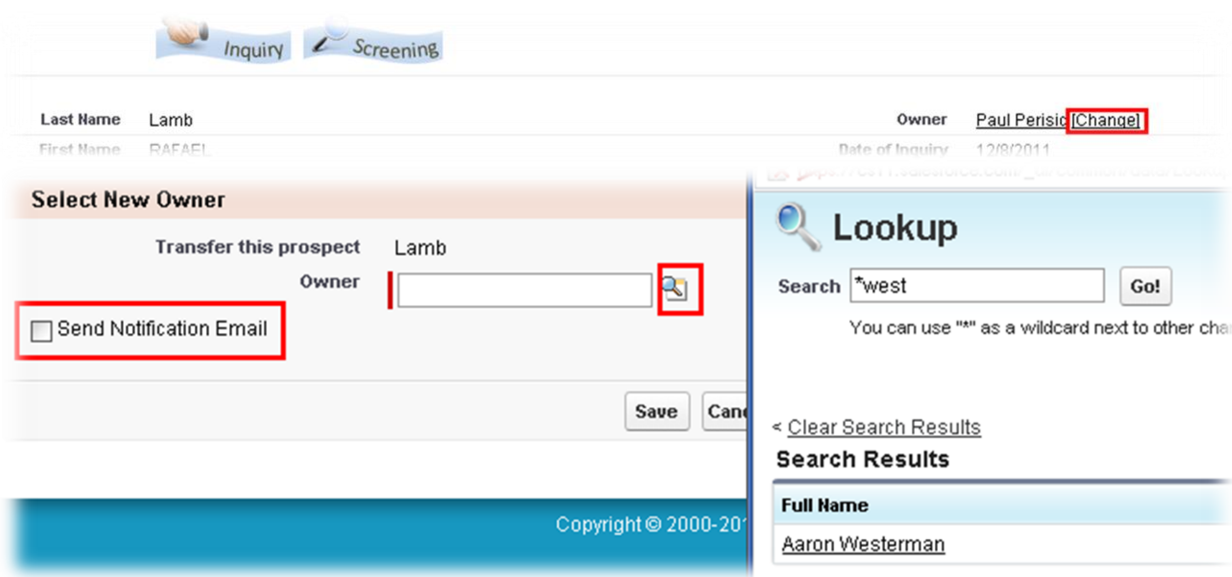
Each record in the system is "owned" by a single person. The owner of a record is responsible for keeping the information contained within it accurate and up-to-date. From time to time a record may need to be reassigned to a different owner because it was either routed improperly or the current owner will be away from the office for an extended period of time and someone else is taking ownership of it in their absence.

To change the owner of a record:

1. Click the "Change" link to the right of the "Owner" heading. This will bring you to a new page.
2. Under the "Select New Owner" heading, click the "Search" to the right of the "Owner" field (magnifying glass). This will open the "Search for a User" window.
3. Using your keyboard, type in the last name of the person you wish to assign the record to and then click the "Go!" button.
4. Under the "Search Results" heading, click on the person's name to make them the new owner of the record. This will close the "Search for a User" window and automatically place the selected user's name in the "Owner" field.
5. Please remember to check the "Send Notification Email" box to send an automated email notification to the new owner of the record, informing them of the change.
6. Click the "Save" button to assign the record to the new owner.

NOTE: You can also type an asterisk (*) before the name you are entering to find records that are similar to the name. You must type at least one letter. For example, just typing "*" will not display anything.



Editing Records

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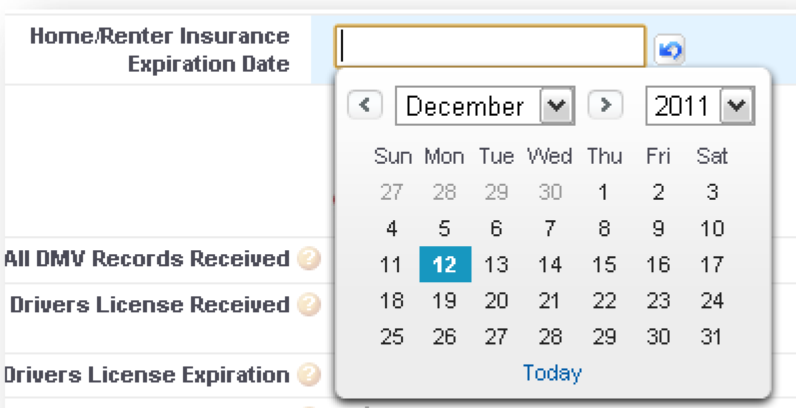
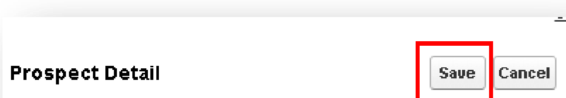
After creating a new record or one has been assigned to you via the application's routing system, you have the ability to edit the information that it contains. As you progress through the process milestones – Inquiry, Screening and Selection, or Approved Mentor – you will need to edit the prospect's details to modify existing information or enter new information that you have received (more information on process milestones can be found in the Screening section). There are two ways in which you can do this:

1. Click on the "Edit" button at the top of the record. It is best to use this method when you know that you'll be editing multiple fields of information.

2. Double-click on the field you wish to edit and enter the information. It is best to use this method when you know that you'll be editing a single field of information.



<u>IMPORTANT NOTE:</u> Both methods require you to save the record after you make an update to any field. A "Save" button is located at both the top and bottom of the page.



Lookup Fields

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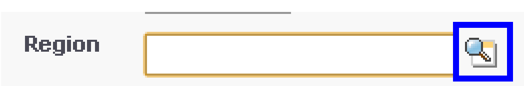
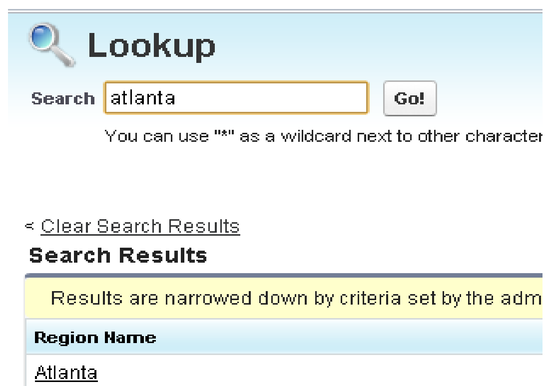
Some fields within a record are linked to other records where a list of appropriate information is stored. These fields are easily identifiable by the "Search" icon (magnifying glass) to the right of the field. For example, within a prospect record there is a field titled "Region" that is a look up to the "Region" records.

To perform a look up:

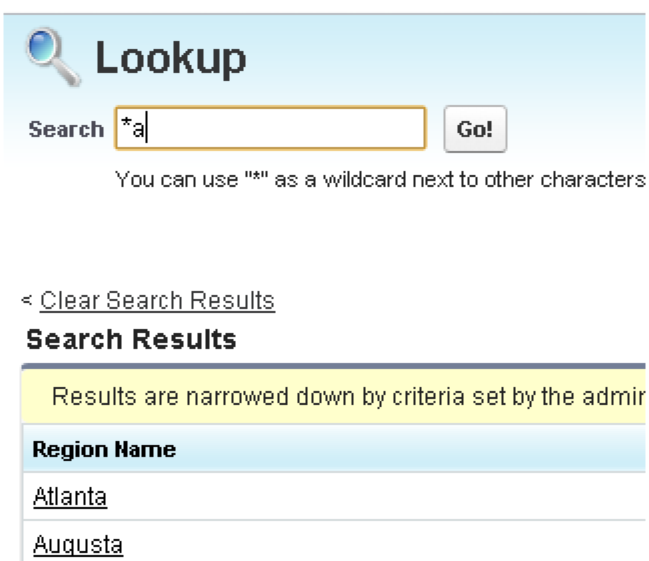
1. Click the "Search" icon (magnifying glass) to the right of the field. This will open a new "Search" window.
2. Using your keyboard, type in the name of the record you wish to find and then click the "Go!" button. (In the example screenshots below, the "Region" titled "Atlanta" is being looked up.)
3. Under the "Search Results" heading, click on the record's name to select it. This will close the "Search" window and automatically place the selected record's name in the lookup field.
4. Remember to click the "Save" button to save your changes when you are done editing the record.

Note – When searching you must enter at least one charter. Clicking the 'Go!' button with nothing typed in will not return any records.





NOTE: You can also type an asterisk (*) in before the search to find records that are similar to the search keyword. You must type at least one letter. For example, just typing "*" will not display anything.



Prospect

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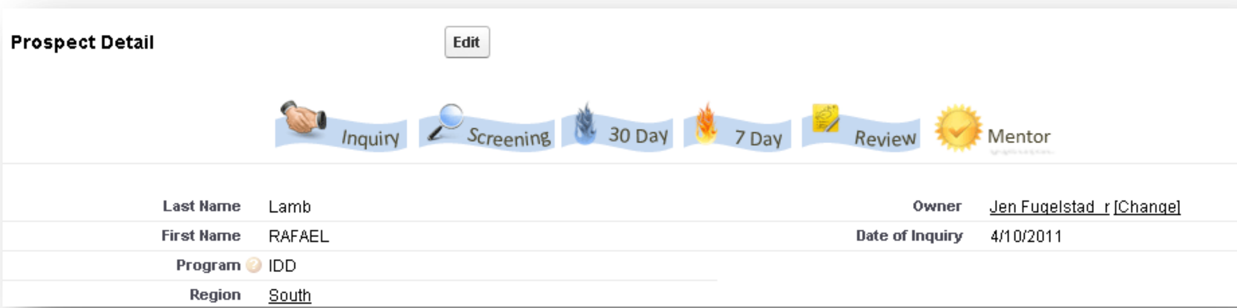
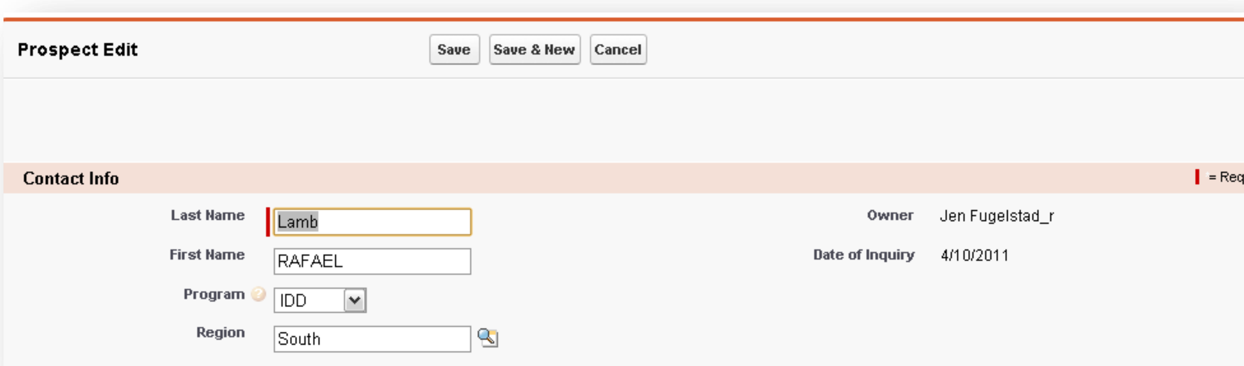
A large amount of data is captured in each prospect's record. This record is organized into several sections which contain many drop-downs, each capturing unique pieces of information. Most contain options like Pass/Fail or Approved/Rejected along with a Pending option (use this value to indicate that you are in the process of completing the milestone.) Some dropdowns such as "Pool Assessment" have a "Does not apply" value. You must actively select this value when it does not apply. For example, the application will not allow a prospect to be set as a Mentor unless the value of pool assessment equals either "Pass" or "Does not apply."

When you view a record you see more information than when you are editing it. For example, the prospect detail status bar (shown below) at the top of the record is not displayed when you are editing a record, instead the "Save," "Save & New," and "Cancel" buttons are visible (also shown below.)

View (Prospect Detail):



Edit (Prospect Edit):



Prospect Stage

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When viewing a record, the very top of the page will indicate what stage a prospect is in.

Stage is determined by the prospect's status in all cases except when the status is "Active." For this status, the stage will start at "Inquiry" and move the "Screening" after the field Application Review has been marked Approved.

If the status "30 day," "7 Day," "Review," or "Mentor" has been applied the stage will be the same as the status. You control when to use these statuses - unlike inquiry to screening (explained in the previous paragraph), the system will not determine when to place a prospect into "30 day," "7 Day," "Review," or "Mentor" status. Use these to help manage how close a prospect is to completing the process of becoming a Mentor.

If the status "Closed-Prospect," "Closed-Agency," or "Closed-Permanent" has been applied the stage will be 'Closed'.

If the status "On hold-Agency" or "On hold-Prospect" has been applied the stage will be "On hold".

Contact Info

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Key contact information for the prospect, such as First and Last Name, Address, and Zipcode are entered and stored here.

"Owner," "Region," and "Program" are required fields. These fields MUST be populated before the application will allow any prospect's status to be set to "Mentor."

"Owner" is the recruiter who is currently working with the prospect.

"Region" is the local, State-based, region a prospect is assigned to e.g. North or South. Each state has a unquie set of regions.

Program is the service line the prospect is interested in or approved for (either Individuals with Developmental Disabilities-IDD or At Risk Youth-ARY.)

The "Date of Inquiry" field displays the date the prospect first inquired about becoming a Mentor. Either the day they (the Prospect) provided their information via the form on the Mentor recruitment website or the date they where enterd into the system by a recruiter or supervisor.

If the Prospect entered their information through the Mentor recruitment website there will be a picture of the earth and some text at the end of this section. The text will indicate that this is a web-based inquiry and on the next line it will tell state what the prospect selected as what they are interested in supporting. They will have chosen one of three options -

1. Adults with intellectual/developmental disabilities
2. Children and Adolescents
3. Undecided

Inquiry

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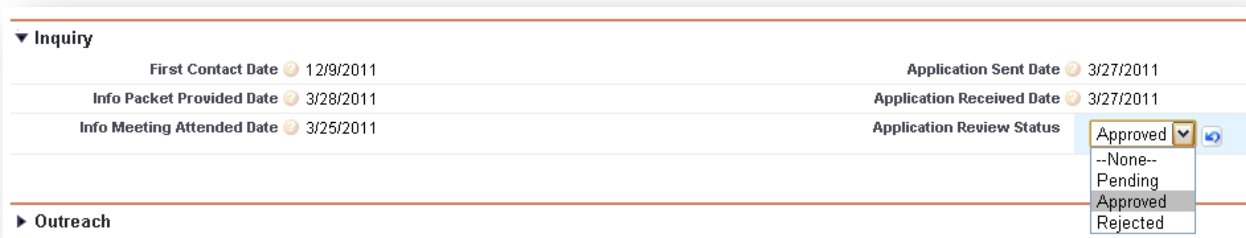
Inquiry is the first stage in the process. A Prospect has inquired about becoming a Mentor. A recruiter contacts them and provides and informational packet and they are encouraged to attend an informational session. The next step is to have them submit an application to their local office.

The goal is to contact a prospect within one business day (no more than three days) of their original Date of Inquiry. For example, if someone inquired on Monday the target date is Tuesday; if someone inquired on Friday the target date is Monday.



Milestone	Purpose
First Contact Date	The date first contact was made with the prospect
Info Packet Provided Date	The date the prospect was provided an Information Packet
Info Meeting Attended Date	The date the prospect attended an information meeting This is an important milestone which some reports are based on Do NOT use this field as a ‘Scheduled Date’ (use the “Notes” field at the end of the form instead. This system assumes when this field is populated that the prospect has attended an information meeting
Application Sent date	The date the prospect was sent the application
Application Received Date	The date the completed application was received
Application Review Status	Indicate the status of the application review in this field

Referral Info

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The fields in this section help determine how the prospect heard about The MENTOR Network. This information is extremely valuable in determining what advertising campaigns are the most effective.

The field 'How did you hear about us?' is automatically populated when a prospect enters their information into the form on the Mentor recruitment website.

More detailed information can be found later in this document – starting at ROI section

Field	Purpose
How did you hear about us?	A drop down field found on the self-entry web-form that identifies the medium through which the prospect heard about us (tv, newspaper, radio, event, etc.)
Ad Campaign / Event Type	A field that will identify a particular ad campaign, type of event or other marketing activity category (i.e. Comcast Ad Buy, PTA meeting, Atlanta Journal Constitution, etc.).
Ad Placement / Event Specifics	A field that will identify additional detail such as where an ad was placed or an event held (i.e. Food Network, Smith Middle School, front page metro section, etc.)
Additional Details	A text field to add specific detail about each campaign (i.e., ad during Sunday morning news show at 9 am, print display ad with "earn money" message, etc.)

History

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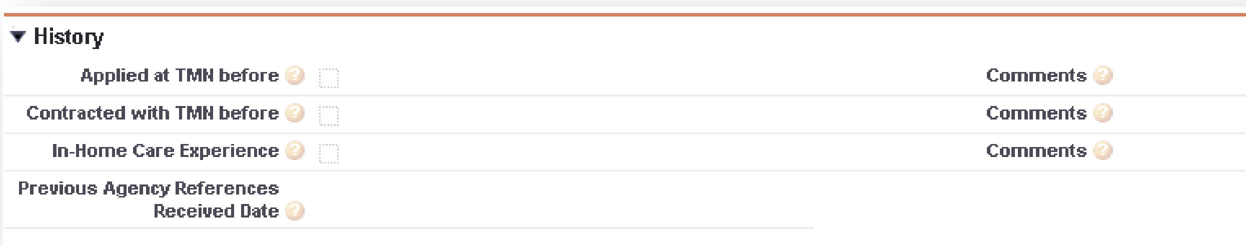
This section will capture the historical information about a prospect via a series of checkboxes combined with comment fields. Anytime a checkbox is marked a comment is automatically required.



Field	Purpose	Notes
Applied at TMN before	Check this box if the prospect has previously applied to be a Mentor at TMN before	
Contracted with TMN before	Check this box if the prospect has previously been a Mentor at TMN	Comments are required if this box is checked
In-Home Care Experience	Check this box if the prospect has been a Mentor at another agency	Comments are required if this box is checked
Previous Agency References Received Date	If applicable put the date you received referrals from the previous agency the prospect was a Mentor at	

Demographics

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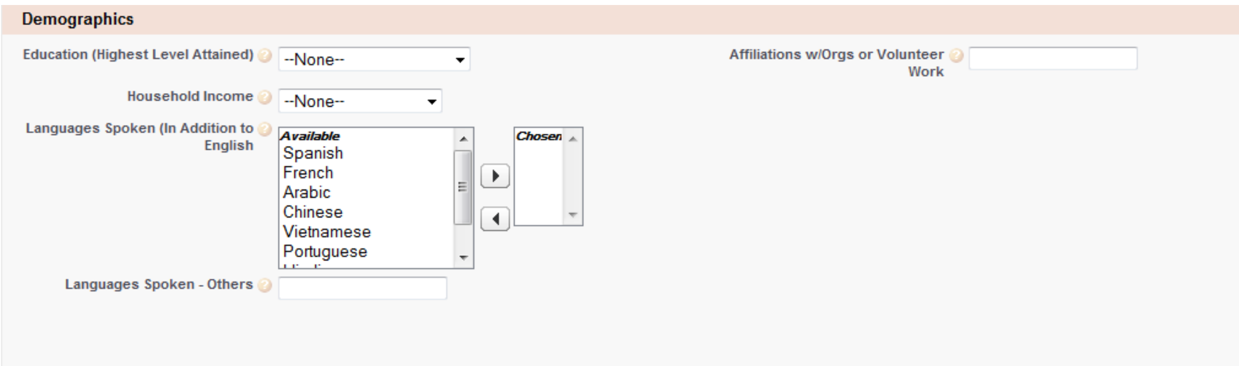
These fields will help us better understand the type of people that are attracted to becoming a Mentor and the characteristics of prospects that successfully complete the application process. This information can be collected at any time during the process based on the discretion of the recruiter. In some cases, recruiters may opt to enter the information into PMC based on the Mentor Contract Application submitted and the interview with the prospect.



Demographic Fields	Purpose
Education	Highest education level attained by the prospective Mentor. Prospective Mentors provide this information on the Mentor Contract Application. A drop-down list is provided for this field.
Household Income	Household income for the prospective Mentor. A drop-down with income ranges is provided for this field.
Languages Spoken	Languages spoken by the prospective Mentor in addition to English. Prospective Mentors provide this information on the Mentor Contract Application. A drop-down list of languages and a field for “Other” languages is provided for this field.
Affiliation with Orgs or Volunteer Works	Open text field where involvement with volunteer organizations can be listed.

Screening

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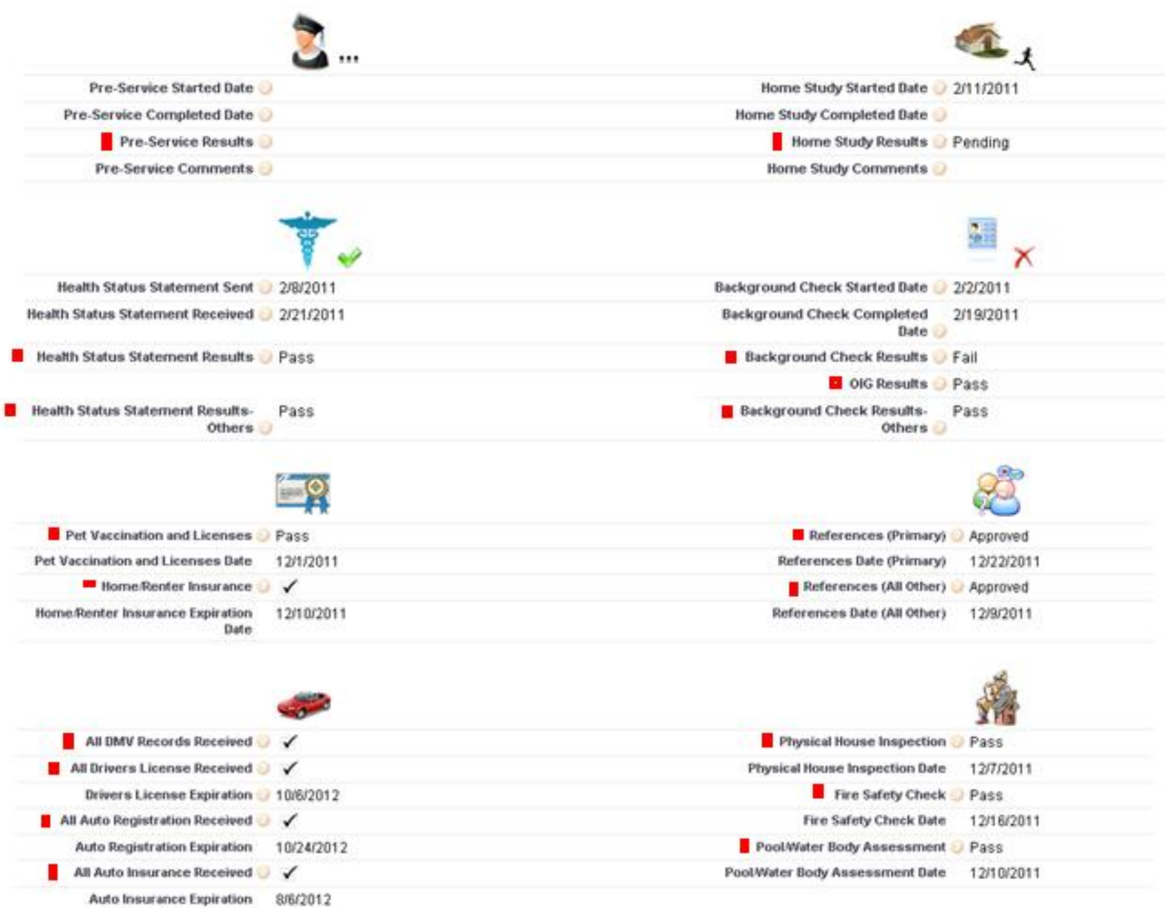
This stage takes the longest time to complete due to The MENTOR Network and local program/state requirements.

There are many milestones that are required before the status of a prospect can be set to “Mentor” and each milestone has associated date fields. Most of the milestones are drop-down items which indicate Pass/Fail or Approved/Rejected as each is completed. The vehicle related and Home/Renter insurance milestones are checkboxes that get marked when each milestone is complete.

In the example screenshot below, “Pre-Service,” “Home Study,” “Health Status Statement,” and “Background Check” have indicators next to the picture above the milestones. “Pre-Service” has not started, “Home Study” is pending, “Health Status Statement” has passed all of the milestones and “Background Check” has failed. Even though some of the milestones have been marked as pass, one of them failed so the overall category has failed and this prospect cannot become a Mentor.
The fields with red boxes next to them are the millstones. The other fields are supplemental.



Use the related Start/Sent dates fields to indicate when each milestone began.

Use the Received/Completed date fields to indicate when a milestone was completed. These fields are required if the related dropdown value is marked as “Pass,” “Fail,” “Approved,” or “Rejected.”

Milestone	Purpose
Pre-Service Results	Indicate the results of Pre-Service
Home study	Indicate the results of the of the home study
Health status statement results	Indicate the results of the health status statement for the prospect
Health status statement results- Others	Indicate the results for ALL other persons, use ‘Does not apply’ if there are no other people that this applies to
Background check results	Indicate the results of the background check for the prospect
OIG results	Indicate the results of the OIG check for the prospect
Background check results –Others	Indicate the results for ALL other persons, use ‘Does not apply’ if there are no other people that this applies to
Pet Vaccination and Licenses	Indicate ‘Pass’ when this is complete; use ‘Does not apply’ as necessary
Home/Renters Insurance	Check this box after you have validated the home/renters insurance
References (Primary)	Indicate the results of the references for the prospect
References (All Others)	Indicate the results for ALL other persons, use ‘Does not apply’ if there are no other people that this applies to
All Auto Insurance Received	Check this box after you have received ALL applicable auto insurance
All Auto Registration Received	Check this box after you have received ALL applicable auto registration
All DMV Records Received	Check this box after you have received ALL applicable DMV records
All Drivers License Received	Check this box after you have received ALL applicable driver’s licenses
Physical House Inspection	Indicate the results of the house inspection
Fire Safety Check	Indicate the results of the fire safety check
Pool/Water body assessment	Indicate the results for the pool or water body assessment; use ‘Does not apply’ as necessary

Status

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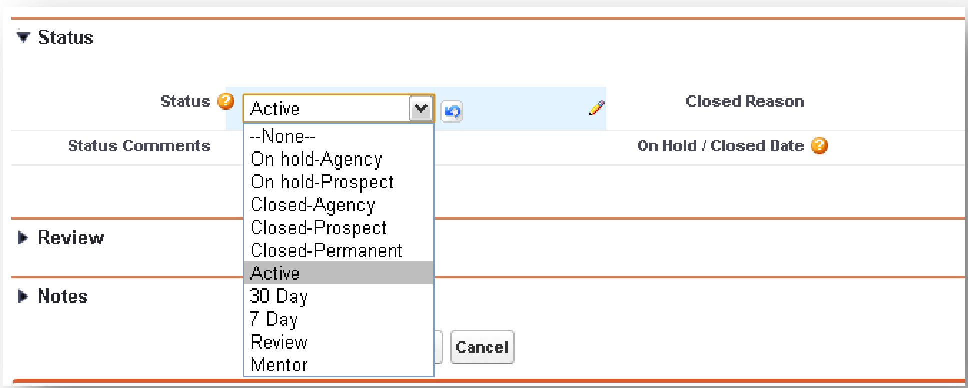
The “Status” field identifies the current position of the Prospect as it relates to the overall process. A Prospect can be switched to “On Hold” or “Close” status at any time during the process. There is a progression from “Active” -> “30 Day” -> “7 Day” -> “Review” -> “Mentor.” All milestones in each stage need to be completed before the manager approves the prospect as a Mentor.

Note: You control what status to give a prospect; the system does not determine when to change the status field.



Status	Use this status when…	Notes
On hold-Agency	You are placing a prospect on hold at The MENTOR Network’s decision	Status comments and date are required
On hold-Prospect	You are placing a prospect on hold at the prospect’s decision	
Closed-Agency	You are closing a prospect at The MENTOR Network’s decision	Closed reason and date are required
Closed-Prospect	You are closing a prospect at the prospect’s decision	
Closed-Permanent	You are permanently closing a prospect	
Active	The prospect is actively pursuing becoming a Mentor	*New prospect will be at this stage by default*
30 Day	The prospect is 30 days away from becoming a Mentor	
7 Day	The prospect is 7 days away from becoming a Mentor	
Review	The prospect is at the final stages and a Manager/Supervisor should be reviewing the record	
Mentor	The prospect is a Mentor	The process is complete; you can use the record as reference.

Review

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This section provides a quick, visual display of each of the fields that are required before the status of a Prospect can be changed to “Mentor.”

These indicators are NOT displayed when editing a record – only when viewing it.

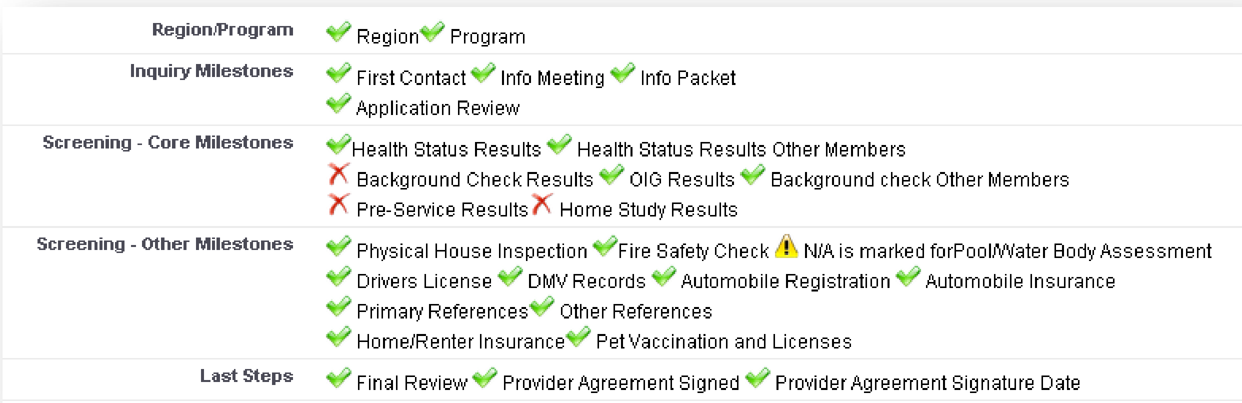
Acceptable -

– Green checks indicate that the field is Pass/Approved/Checked

Yellow exclamation marks (!) indicate that the field has been marked as “Does not apply”

Unacceptable -

– Red X’s indicate that the field is blank or an unacceptable value (like fail) has been marked



Field	Purpose
Final Review	Indicate approved when a prospects record has been reviewed and they are now Mentor. Only Managers/Supervisors have the ability to change this field
Provider agreement signed	Check this box after the prospect has signed the general provider agreement
Provider Agreement Signature date	Indicate the date the prospect signed the general provider agreement. This date will be used to determine when a prospect became a Mentor on reports.

Acceptable Values for fields

Milestone	Acceptable Values
Region	Any, cannot be blank
Program	Any, cannot be blank
Pre-Service Results	Pass
Home study	Pass
Health status statement results	Pass
Health status statement results-Others	Pass/Does not apply
Background check results	Pass
OIG results	Pass
Background check results –Others	Pass/Does not apply
Pet Vaccination and Licenses	Pass/Does not apply
Home/Renters Insurance	Checked
References (Primary)	Approved
References (All Others)	Approved/Does not apply
All Auto Insurance Received	Checked
All Auto Registration Received	Checked
All DMV Records Received	Checked
All Drivers License Received	Checked
Physical House Inspection	Pass
Fire Safety Check	Pass
Pool/Water body assessment	Pass/Does not apply
Provider agreement signed	Checked
Provider Agreement Signature date	Any, cannot be blank
Final Review	Approved

Notes

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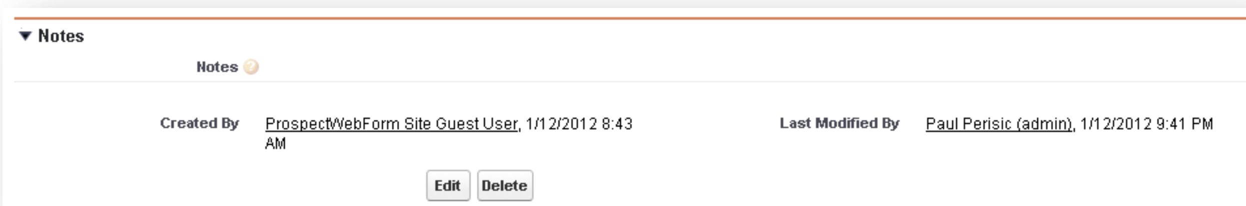
Use this section to add any notes to the prospect record. If the inquiry was web-based, you will see an indicator here. The date the last time the status was changed will be shown here as well as who created and last modified the record.

CAUTION: It is important to keep in mind privacy concerns with regards to sensitive health information. As recruiters regularly back up for other recruiters, and recruiters in all regions will have access to other recruiters information, any privacy data about a Prospect should not be documented. This same rule applies for any of the open comment fields within the application.



Logging a Call

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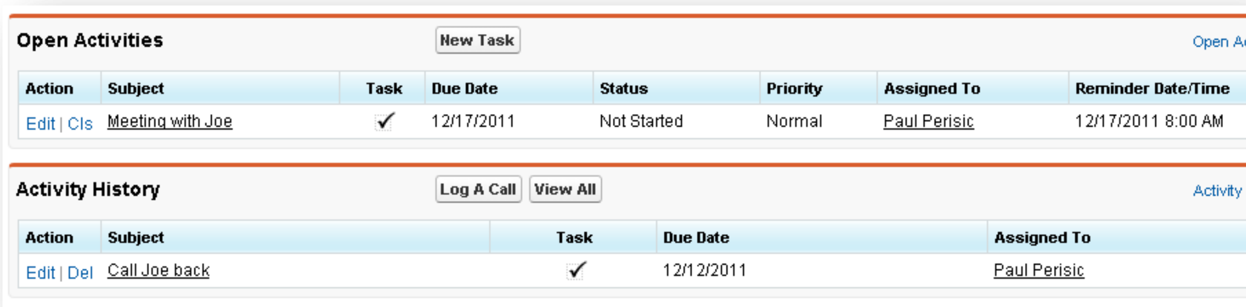
Logging a call is a quick and easy way to document that you had a conversation with a Prospect on a certain date and time and it allows you to also enter some brief notes about the discussion. To log a call, simply click on the "Log A Call" button under the "Active History" header and then follow the simple on screen instructions.



Tasks

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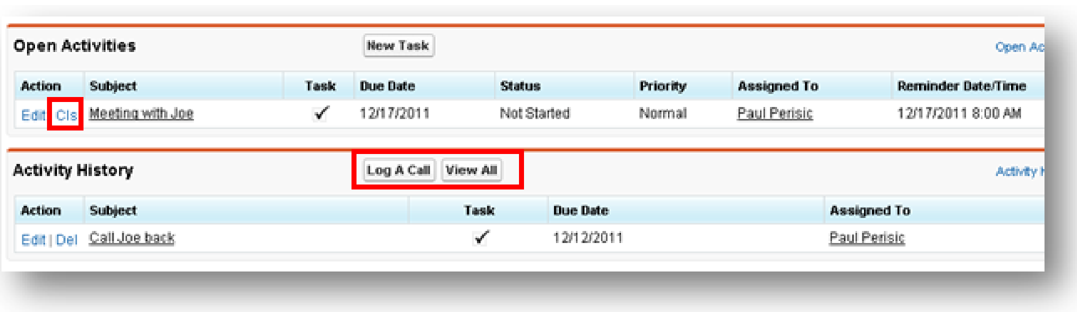
Tasks are an easy way to setup reminders, both visual pop-ups within the application and email notifications, for any activities which require follow-up action on specific date and time.

The “Open Activities” area shows a list of tasks that are incomplete.
The “Activity History” area shows a list of tasks that have been completed.

- Use the “Cls” (close) link to complete the task
- Use the “View All” button to see a list of all the completed tasks
- Use the “Log A Call button” to log a call.



Creating New Tasks

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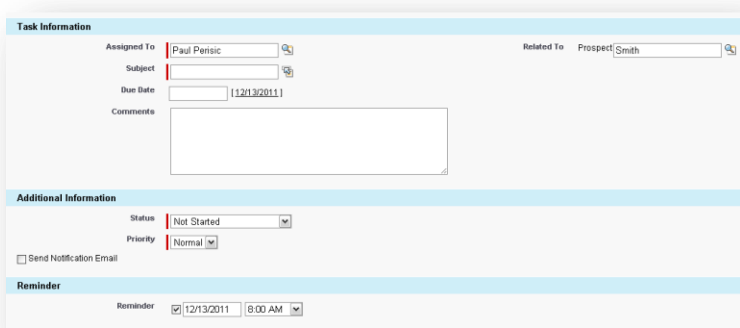
To create a new task:

1. Click the “New Task” button. Note that the “Assigned to” field has been pre-populated with your user name and that the “Related to” field has been pre-populated with the prospect.
2. Enter a subject.
3. Select a due date.
4. Select a status.
5. Select a priority.
6. If you are assigning a task to someone else its recommended that you send them a notification, by checking the “Send Notification Email” box.
7. Optionally, you can choose to setup a reminder.
8. Click the “Save” Button.



Return on Investment (ROI)

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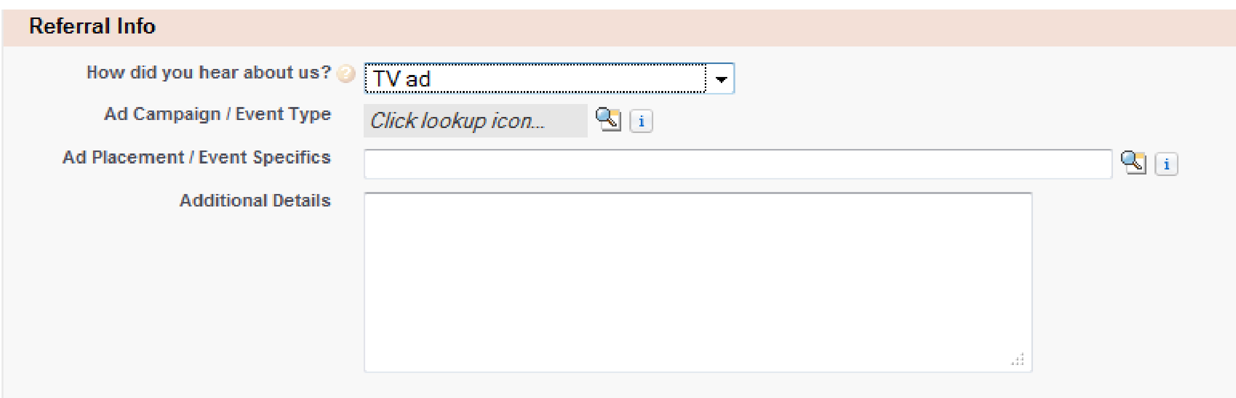
Capturing return on investment (ROI) data will help us to track:

- How people hear about us—TV, radio, attending an event, etc.
- What advertising campaign or type of event they saw/attended
- Specifically what ad did they see or what event did they attend
- Any additional details that help us better understand who our audience is, what they are watching/listening to and what messages resonate with them.

To capture ROI information:

1. **How did you hear about us?** This is the medium (TV, radio, or newspaper ad; referral; attended an event, etc.) that leads the prospect to The Network. If the prospect comes through the Mentor recruitment website this information is automatically passed through from the inquiry form into the PMC. If they do not come through the website, it must be populated manually when the Recruiter first has contact with the prospect. **Be sure to ask how they heard about us.**



2. **Identify Ad Campaign/Event Type**. This is the specific information about the advertising buy or the event type. Examples of an advertising buy would be a statewide TV ad buy from Charter Communications or a newspaper ad in the Atlanta Journal Constitution.

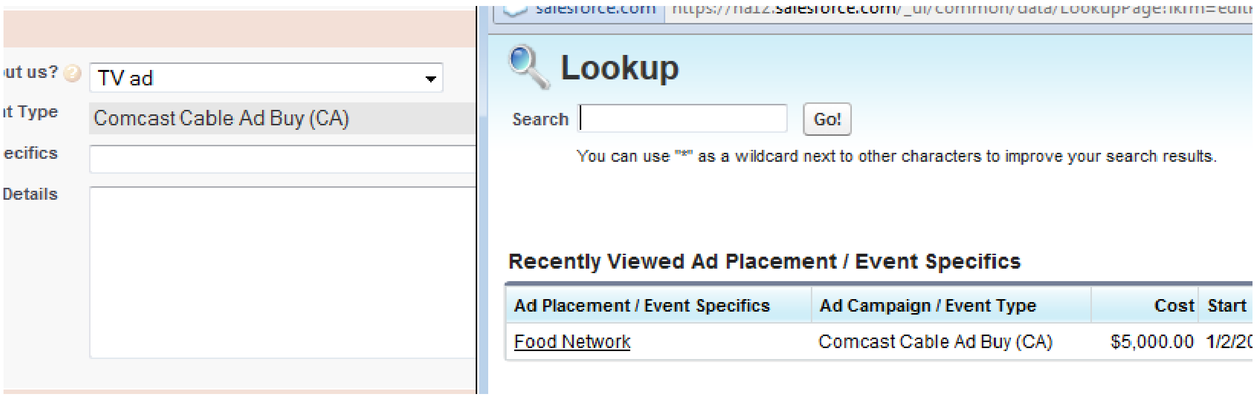
   This field is dependent on the Source dropdown above. So, you can't select a newspaper as the campaign if how you heard about us says it was a TV ad.

   Ad Campaign/Event types are stored in the PMC and available through a look up field (shown below). Before entering a new Ad Campaign or Event Type, click the lookup icon and make sure that your ad campaign isn't already listed. If it is listed, click on that campaign. If it is not, you'll need to create it from the ad campaign or event type tab (see next section for more information on how to create ad campaigns/event types.

   For Ad Campaigns with national organizations—for example, if you bought a series of ads from Comcast, be sure to note the state in listing that campaign, i.e. Comcast Cable Ad Buy—CA.

3. Include information about the **Ad Placement or Event Specifics.** This is the specific information about the ad placement or event. Examples of ad placement would the TV ad aired on Food Network or the ad in the Atlanta Journal Constitution was on the front page of the Metro section.

   Ad Campaign/Event types are stored in the PMC and available through a look up field (shown below). Before entering new Ad Placement or Event Specifics, click the lookup icon and make sure that the information isn't already listed. If it is listed, click on that campaign or event. If it is not, you'll need to create it from the ad placement or event specifics tab (see next section for more information on how to create ad placement/event specifics.



Ad Campaign / Event Type

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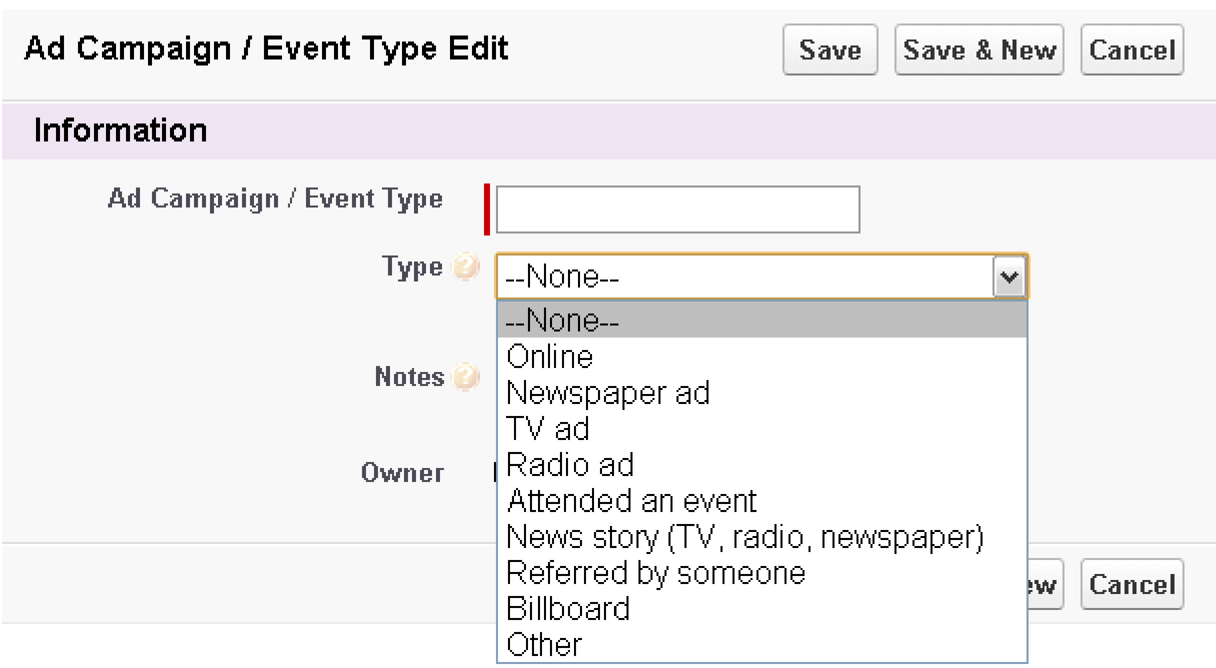
"Ad Campaign / Event Type" is specific information about the advertising buy or the event type. Examples of an advertising buy would be a statewide TV ad buy from Charter Communications or a newspaper ad in the Atlanta Journal Constitution.

To create a new Ad Campaign / Event Type:

1. Click the "Ad Campaign / Event Type" tab.
2. Click the "New" button.
3. Enter a name for the "Add Campaign / Event Type."
4. Select a type from the drop-down menu. This categorization helps define when the "Add Campaign / Event Type" will appear as a selectable option.
5. Enter any additional notes into the "Notes" field.
6. Click the "Save" Button.



Field	Purpose
Ad Campaign / Event Type	The name of the Ad Campaign / Event Type
Type	The type
Notes	Additional notes may be added here

Ad Placement / Event Specifics

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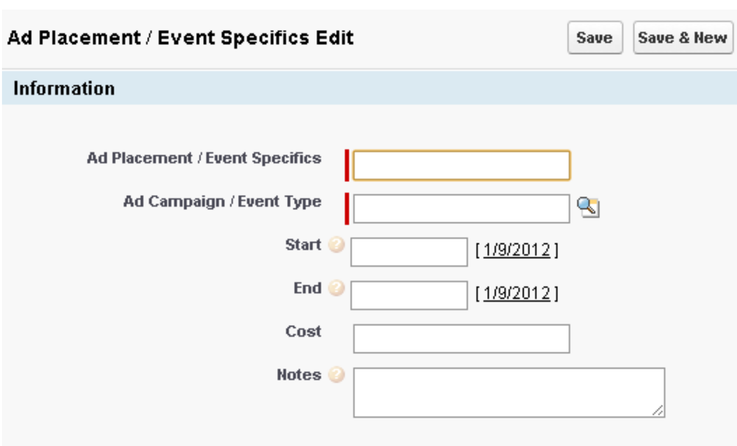
"Ad Placement / Event Specifics" provides specific information about an ad placement or event. Examples of ad placement would be the TV ad aired on Food Network or the ad in the Atlanta Journal Constitution that was on the front page of the Metro section.

To create a new Ad Placement / Event Specifics:

1. Click the "Ad Placement / Event Specifics" tab.
2. Click the "New" button.
3. Enter a name for the "Ad Placement / Event Specifics."
4. Choose the appropriate "Ad Campaign / Event Type" using the lookup field.
5. Enter both a "Start Date" and "End Date" for the "Ad Placement / Event Specifics."
6. Enter the cost of the "Ad Placement / Event Specifics."
7. Enter any additional notes into the "Notes" field.
8. Click the "Save" Button.



Field	Purpose
Ad Placement / Event Specifics	The name of the "Ad Placement / Event Specifics"
Ad Campaign / Event Type	The associated type of "Ad Campaign / Event Type"
Start Date	The start date for the "Ad Placement / Event Specifics"
End Date	The start date for the "Ad Placement / Event Specifics"
Cost	The associated cost of the "Ad Placement / Event Specifics"

Routing

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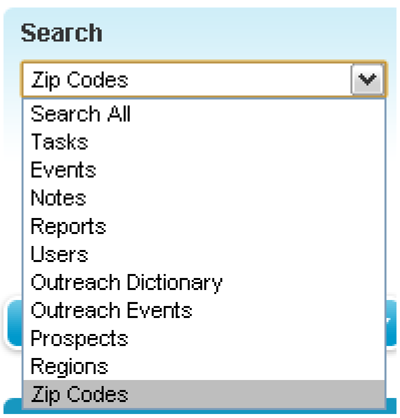
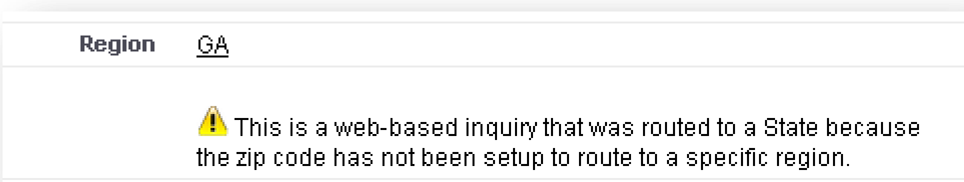
Automatic routing will occur for prospects entering their contact info in through the web-form on the Mentor recruitment website. The routing of the prospect information is determined by the zip code they enter. Each zip code will route to a specific region. To see what region a zip code routes to, search the zip from the Side bar. If a zip code is not entered into the backend system the search will display no results and instead of the prospect routing to a region it will be routed to a state.

As routing occurs the prospect region will be automatically updated. In the event that a prospect was routed to a state, the region will reflect that state and the system will provide a warning below the region field. The warning indicates that routing has not been setup for the zip code entered on the web-form. Note: The prospects region should be updated to a local region as quickly as possible. Some reports are based on this field. So even if the prospects record is being closed or put on hold – you should still update this field to provide accurate reporting.





Reports

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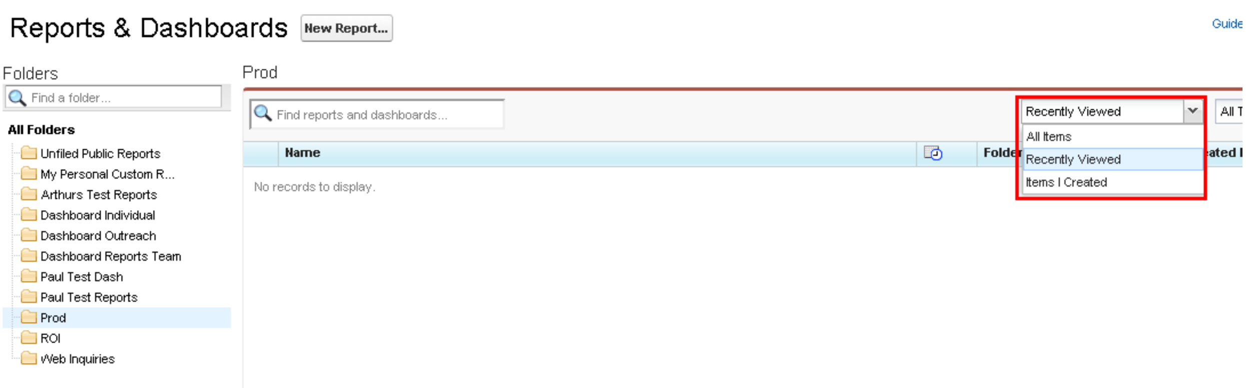
The “Reports” area allows you to run real-time reports on the data that has been entered into the system to track and analyze trends.

NOTE: The view in the “Reports” area will always default to recent items.



Making Ad Hoc Changes to Reports

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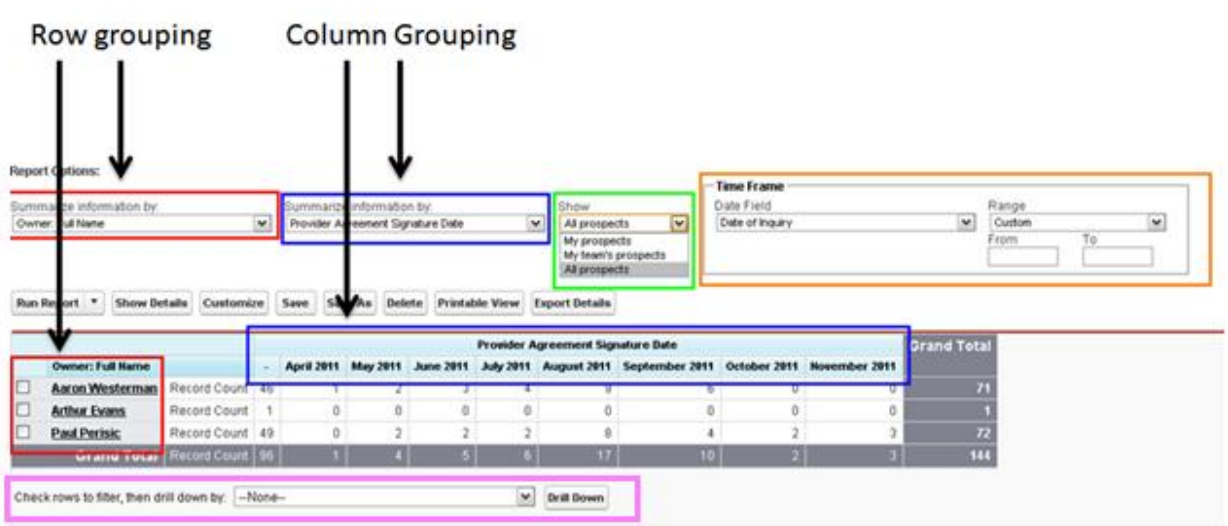
As you run a report you can:
-Group Rows and Columns
-Filter for prospects owned by you or the region(s) you belong to
-Adjust the timeframe
-Drill into the data



Examples of Making Report Changes

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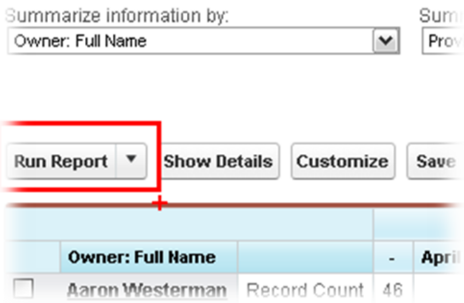
After you adjust the filter/grouping click the “Run Report” button.

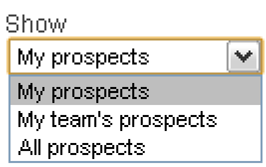


Report used in the examples -

	Owner: Full Name		Provider Agreement Signature Date									Grand Total
			-	April 2011	May 2011	June 2011	July 2011	August 2011	September 2011	October 2011	November 2011	
☐	Aaron Westerman	Record Count	46	1	2	3	4	9	6	0	0	71
☐	Arthur Evans	Record Count	1	0	0	0	0	0	0	0	0	1
☐	Paul Perisic	Record Count	49	0	2	2	2	8	4	2	3	72
	Grand Total	Record Count	96	1	4	5	6	17	10	2	3	144

--Show--

The report current lists approved Mentors by recruiter. Changing the Show filter to My prospects will filter out Mentors that are owned by other recruiters

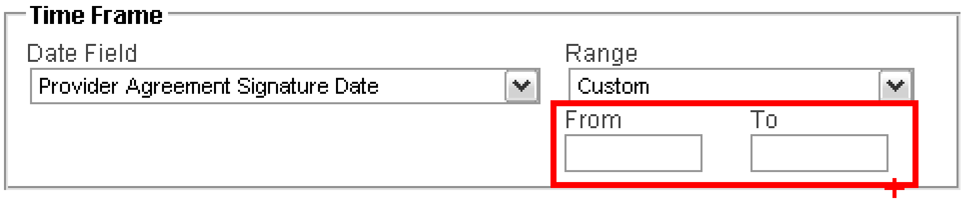


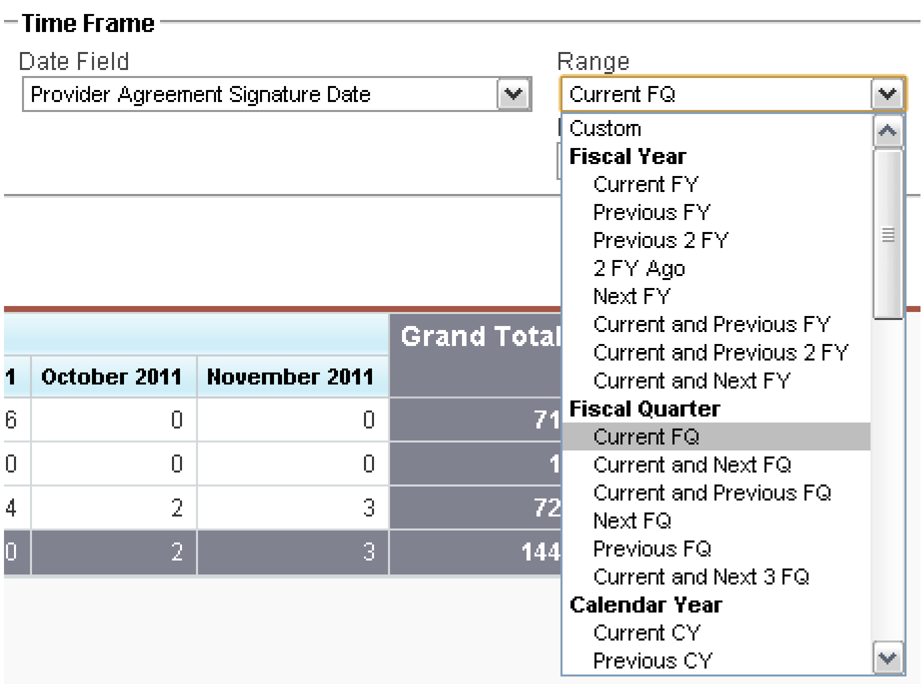
Result -

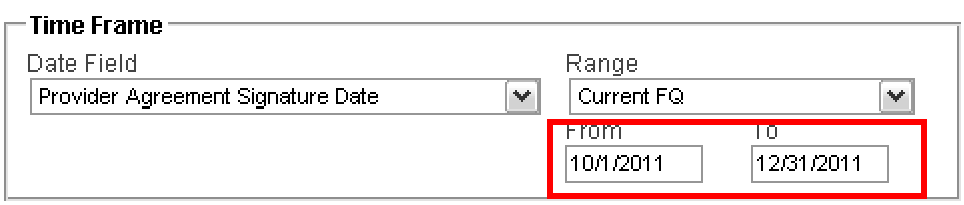
	Owner: Full Name		Provider Agreement Signature Date								Grand Total
			-	May 2011	June 2011	July 2011	August 2011	September 2011	October 2011	November 2011	
☐	Paul Perisic	Record Count	48	2	2	2	8	4	2	3	71
	Grand Total	Record Count	48	2	2	2	8	4	2	3	71

--Timeframe--

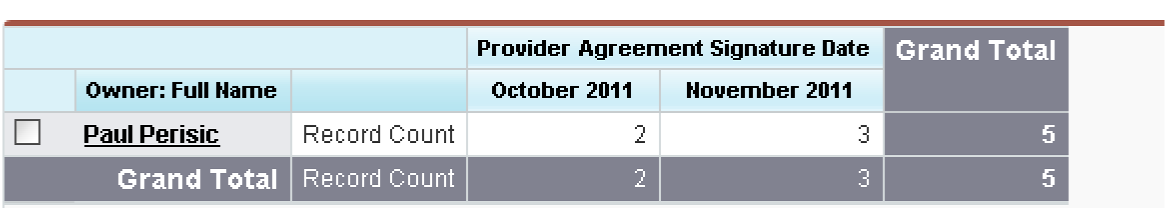
The report currently lists approved Mentors for all time. Changing the Timeframe can filter out months you don't wish to see. You can either input a custom date range or select one from the list. If you select one from the list, the application will populate the date range based on what you select.







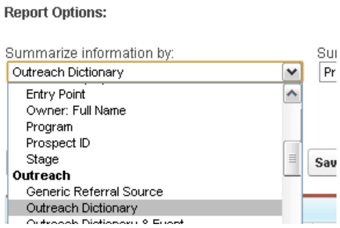
Result -



	Owner: Full Name		Provider Agreement Signature Date: October 2011	November 2011	Grand Total
☐	Paul Perisic	Record Count	2	3	5
	Grand Total	Record Count	2	3	5

--Row and Column Grouping--

The report current lists approved Mentors by recruiter. This example adjusts it to see the same information by Outreach Source rather than recruiter. Then it will show you how to drill into the data.



Result - there are two prospects that do not have any Outreach info. Let's drill in and see who those prospects are!

			Provider Agreement Signature Date									Grand Total
	Outreach Dictionary		-	April 2011	May 2011	June 2011	July 2011	August 2011	September 2011	October 2011	November 2011	
☐		Record Count	2	0	0	0	0	0	0	0	0	2
☐	101.3	Record Count	22	0	1	0	2	4	0	1	2	32
☐	NBC	Record Count	42	1	2	2	2	8	10	1	1	69
☐	Star Tribune	Record Count	30	0	1	3	2	5	0	0	0	41
	Grand Total	Record Count	96	1	4	5	6	17	10	2	3	144

--Drill Down--

Check the box next to the empty row, drill down by Last Name and press the Drill Down button.

			Provider Agreement Signature Date									Grand Total
	Outreach Dictionary		-	April 2011	May 2011	June 2011	July 2011	August 2011	September 2011	October 2011	November 2011	
☑		Record Count	2	0	0	0	0	0	0	0	0	2
☐	101.3	Record Count	22	0	1	0	2	4	0	1	2	32
☐	NBC	Record Count	42	1	2	2	2	8	10	1	1	69
☐	Star Tribune	Record Count	30	0	1	3	2	5	0	0	0	41
	Grand Total	Record Count	96	1	4	5	6	17	10	2	3	144

Check rows to filter, then drill down by: Last Name [Drill Down]

Results -

Filtered By: Edit
Outreach Dictionary equals Clear

			Provider Agreement Signature Date	Grand Total
	Last Name		-	
☐	Evans	Record Count	1	1
☐	Smith	Record Count	1	1
	Grand Total	Record Count	2	2

Check rows to filter, then drill down by: --None-- [Drill Down]

Appendix A: Views

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Prospects	
The following view will be label as All or My for example "All – 30 day" or "My – 30 Day" When using the 'All' version you will see a list of all Prospects you can access. For most people this will be all the prospects in assigned in their region. When using the 'My' version you will see a list of Prospects you own	
View Name	**What you see**
All	A list of all prospect without any filter
30 day	A list of prospects with the status '30 Day'
7 Day	A list of prospects with the status '70 Day'
Closed	A list of prospects with all of the three (3) closed statuses – Closed-Prospect, Closed-Agency, Closed-Permanent
Mentors	A list of prospects with the status 'Mentor'
On Hold	A list of prospect with any of the two (2) On hold statuses – On hold-Agency or On hold-Prospect
Review	A list of prospects with the status 'Review'
All Web Inquiries	Displays a list of inquiries that came from the web-site

Appendix B: Process Flows

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The standard process was created by several individuals from the Mentor Recruiting business. The process flow is separated out by stages within the process.

mentor recruiting
process phase I ver2.