The MENTOR Network

Prospective Mentor Connector

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

The MENTOR Network

Participant Packet

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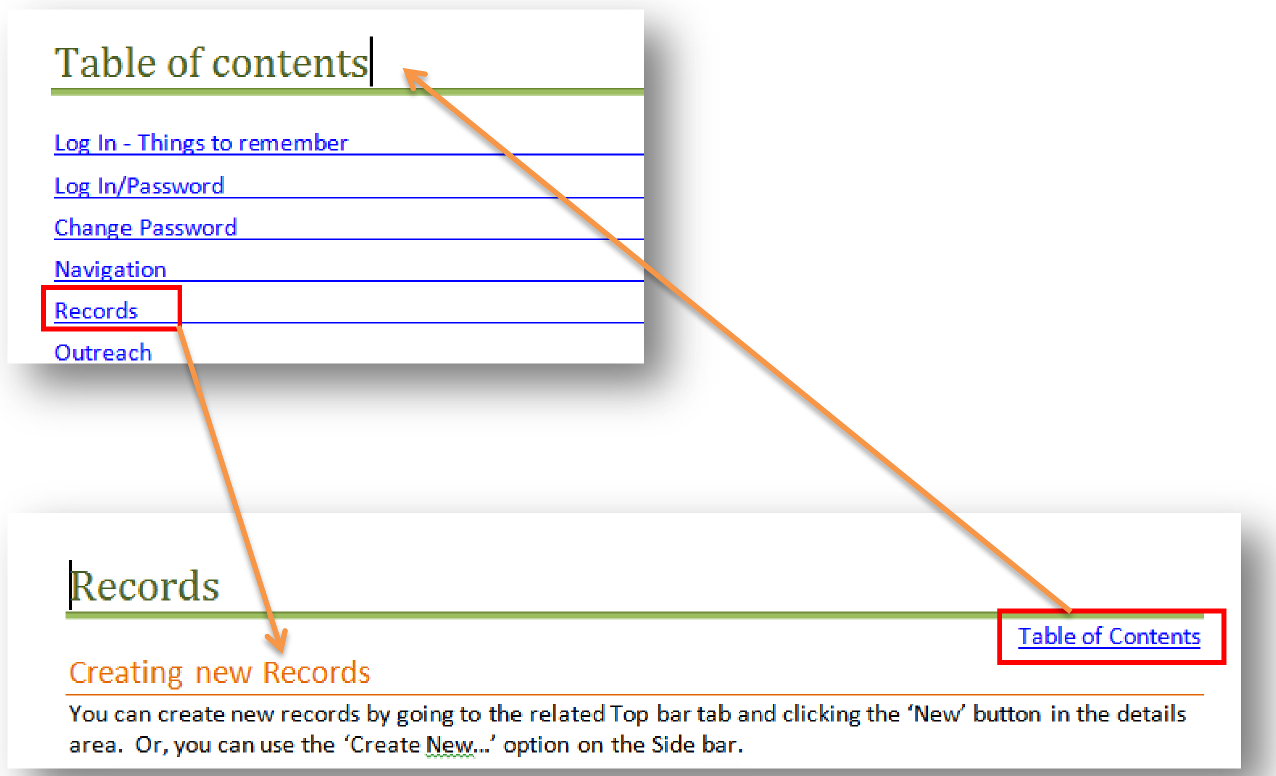
Navigating this Document

This document includes several sections and subsections of information. Major section headers are easily identified by large dark green text which is underlined in light 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 at the beginning 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 hyperlink back to the table of contents in the top right-hand corner of the page.



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About the Prospective Mentor Connector

The Prospective Mentor Connector (PMC) is a web-based system 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 is built on the Force.com technology platform, a product of Salesforce.com, one of the country's leading developers of client relationship management (CRM) software. Combined with The Network's Mentor Recruitment Website (www.makeadifferenceathome.com) PMC is designed to help recruiters identify, connect with, and track prospective Mentors from their first contact with the organization to their approval as a new Mentor. Recruiters will be able to use PMC to:

- Manage prospective Mentor information in a convenient web-based system
- Track the entire lifecycle of each prospect from first contact through becoming a Mentor
- Set up reminders for tasks and ongoing communication and marketing activities
- Measure the return on investment for various recruitment marketing strategies
- Measure results and track progress through real-time reporting capabilities

PMC Feedback & Development Process

The PMC is developed based on requirements and input from recruiters and recruiter managers as well as state and program leadership. In collaboration with the project management team, PMC users provide essential feedback to inform further development and changes to the existing system.

Launched earlier this year, PMC currently meets the basic set of Network-wide criteria for Host Home recruitment and is a required tracking tool for Mentor recruitment activities. As a flexible, web-based system PMC will be expanded and enhanced to meet other Network and state-specific criteria in the future. However, while the PMC remains in its early stages please continue to track information specific to your local program as you have in the past.

Through strategic direction from the project management team and continued feedback from recruiters, the PMC will continue to evolve to better meet users' needs. There are many possibilities for additional ways the PMC can assist recruiters in managing their relationships with prospective Mentors—including state-specific data requirements, additional automation options, mobile-friendly tools, enhanced reporting, and more!

Your feedback is vital to the continued success and future development of PMC which will assist The Network in growing its Host Home programs throughout the country. Please send your suggestions to PMCRequests@thementornetwork.com. After receiving your request, a representative from the project team will be in touch to gather additional information as necessary and communicate next steps. Some requests may require additional analysis prior to being added to the system's overall development plan.

System Requirements

PMC is a web-based application that can be accessed from anywhere you have an internet connection. Please note that you do not have to be connected to The MENTOR Network but there are a few ways to optimize your experience explained below.

Internet Explorer

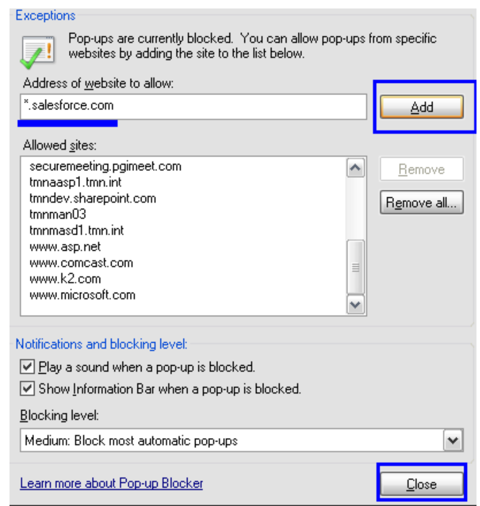
Internet Explorer 8 or above is required to access the Prospective Mentor Connector. If you do not currently have this web browser installed on your computer you will need to contact the Information Technology Service Center (ITSC) for installation assistance.

Allowing Pop-Up Windows

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-up windows in Internet Explorer:

1. Open Internet Explorer
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



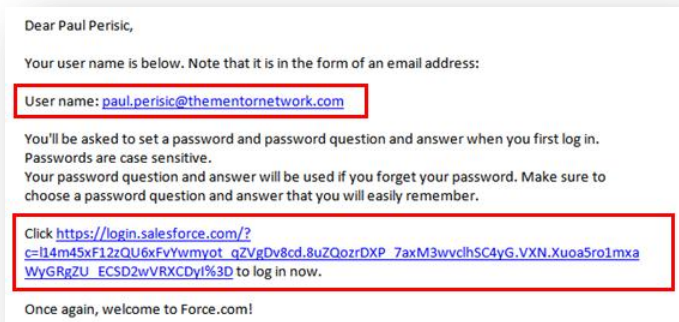
Account Administration

Account Setup

A PMC license must be requested by the Manager for each new user. To request the account, Managers can submit the request to PMCRequests@thementornetwork.com. When requesting access to PMC, please note the users Profile (Mentor or Mentor Recruiter Manager) as well as the area they cover which is called their "Role" in PMC. For a list of roles in PMC, please refer to Appendix C.

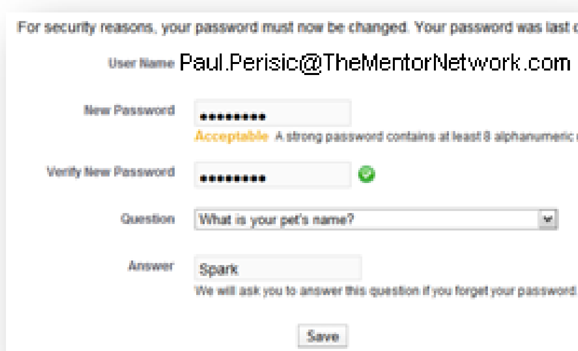
Account Validation

Once your account is created in PMC an email will automatically be generated and sent to your @thementornetwork.com email address 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 always be same as your 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 into your "Inbox" folder in order to click the link provided to validate your account. For assistance, please contact the ITSC.

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.).

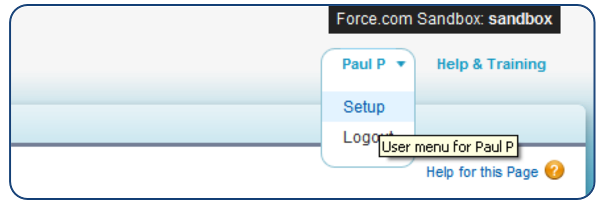
Changing your Password

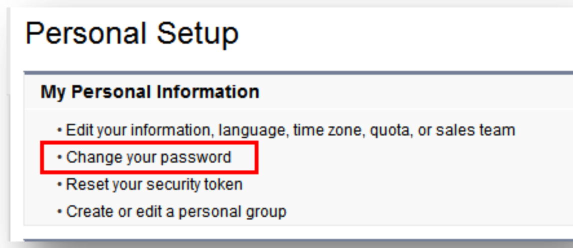
For security reasons you will be automatically prompted to change your password by the PMC system once every 90 days. You can also change your password at any time by following the instructions outlined below.

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





Passwords Recovery and Resets

To recover your password, click the “Forgot your password?” link on the login screen where you will be prompted to enter your username. Once entered, a temporary password will be sent to your email with a link to log in and reset your password.

⚠ **NOTE:** This email may be delivered to your “Junk E-Mail” folder in Outlook and you may need to move it into your “Inbox” folder in order to click the link provided to reset your password. For assistance with Outlook, please contact the ITSC

If your account becomes temporarily disabled because of too many failed login attempts, please contact PMCRequests@thementornetwork.com to have your password reset.

Logging in

After completing the one time account validation process, you can login to the application at any time using the following link:

https://login.salesforce.com

In addition, you may want to create a favorite in Internet Explorer and/or a shortcut on your desktop for quick access to the PMC.

To create a new favorite to the PMC:
1. Open Internet Explorer
2. Type “https://login.salesforce.com” into the “Address Bar” at the top of the Internet Explorer application window
3. Press the <ENTER> key

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4. Press <CTRL>+<D> to open the “Add a Favorite” window
5. Click the “Add” button to add the PMC system to the end of your favorites list

To access the PMC using the favorite link:

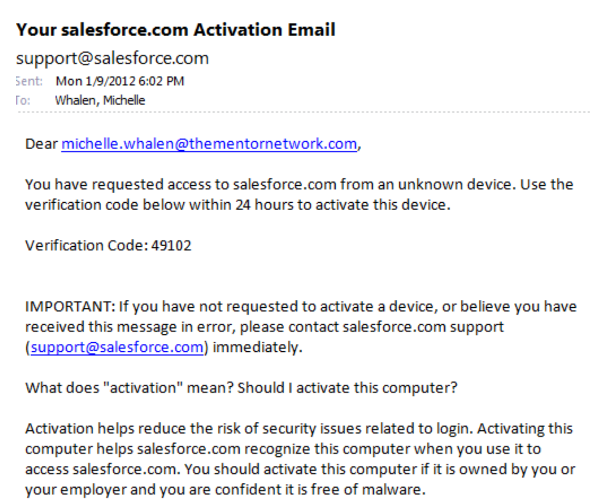
1. Open Internet Explorer
2. Select “Favorites” from the top menu bar
3. Select “salesforce.com – Customer Secure Login Page” from the drop-down menu that appears

To create a desktop shortcut to the PMC:

1. Right-click on any empty area of you desktop and select “New” -> “Shortcut” from the pop-up menu that appears.”
2. The “Create Shortcut” window opens. Type “https://login.salesforce.com” into the box under the heading “Type the location of the item”
3. Click the “Next” button in the lower right-hand corner of the window.
4. Type “PMC” into the box under the header labeled “Type a name for this shortcut:”
5. Click the “Finish” button in the lower right-hand corner of the window to close the “Create Shortcut” window and return to your desktop. A new shortcut icon to launch the PMC should now be visible on your desktop.

Logging In – From Multiple Computers

For security purposes, if you login to the PMC from multiple computers you may be required to revalidate your account information. The revalidation process is similar to the initial account setup process you completed the first time you logged into the PMC. You’ll receive an email from support@salesforce.com with a 5 character code that you’ll be asked to input the next time you attempt to login.



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.

NOTE: This email may be delivered to your “Junk E-Mail” folder in Outlook and you may need to move it into your “Inbox” folder in order to click the link provided to revalidate your account. For assistance with Outlook, please contact the ITSC .

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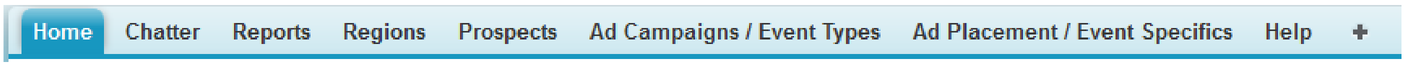
Navigation

The Top Navigation Bar

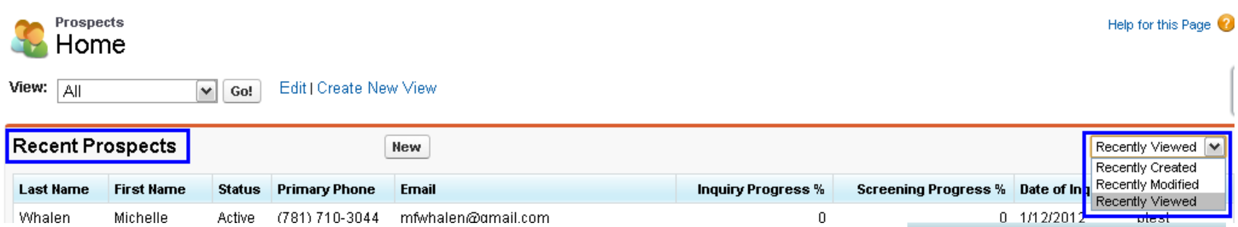


The top of each page contains a set of tabs which link to various areas of PMC. By default, each time you login, you will automatically be brought to the "Home" tab. You may also customize the tabs that appear at the top of your screen by clicking on the "+" button at the far right. There you may choose from other available tabs such as "People"—which will provide a convenient way to search for other PMC users that you can follow on Chatter.

Anytime that you click on a tab you will be brought to a list of recent items (the default view) that are related to that area of the PMC. Please note you can change your view at any time, see information below.

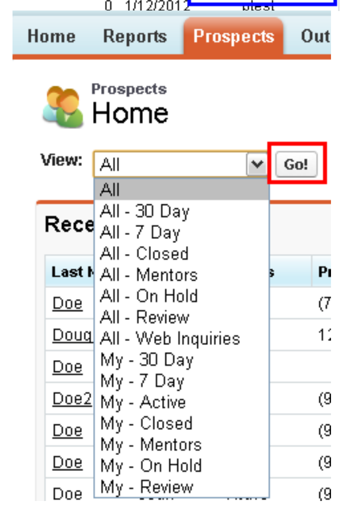
Views

You can change your default recent view by using the drop-down menu in the top right-hand corner of the screen. The available options are: "Recently Created," "Recently Modified," and "Recently Viewed" as shown below. 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 Region area it will be titled "Region."



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've selected the view you'd like, you <u>MUST</u> click the "Go!" button <u>to execute your selection.</u>



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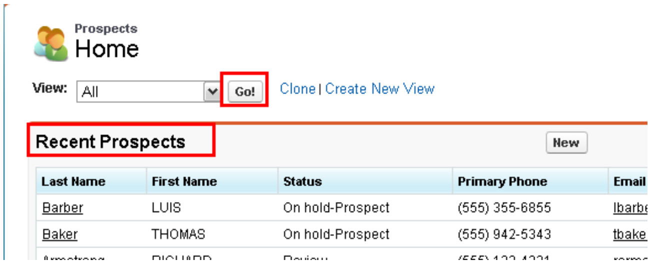
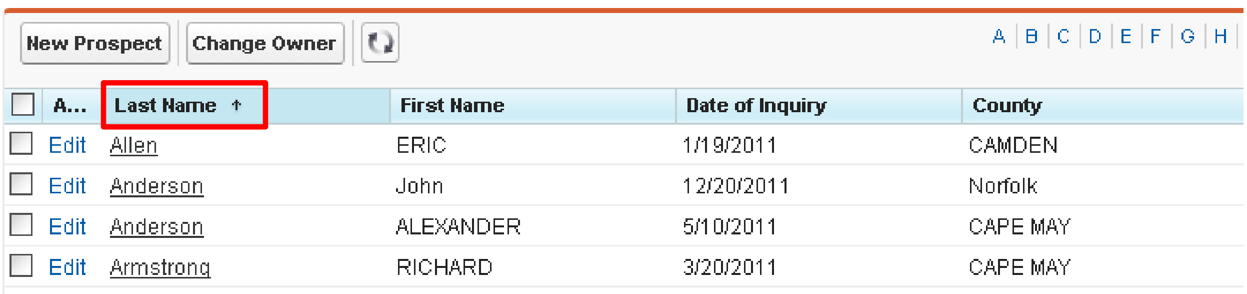
After you click the "GO!" button a record set containing the appropriate results will be returned in list format. Three new buttons will become visible at the top of this grid: "New Prospect," "Change Owner," and a "Refresh Record" icon.

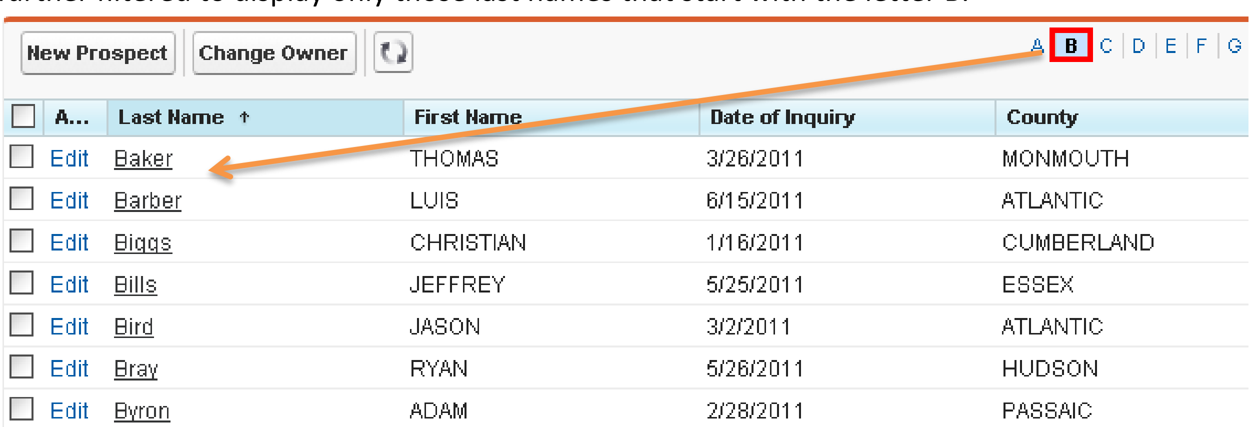


The column heading with a slightly darker color and an arrow next to its name is the column the grid is currently sorted by. An up arrow signifies ascending (A-Z) sorting while a down arrow signifies descending (Z-A) sorting. You can resort the records by simply clicking on any of the column headings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



When available, 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 records that were returned were sorted by the "Last Name" column and then were further filtered to display only those last names that start with the letter B.



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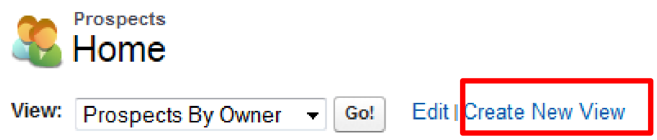
Creating Custom Views

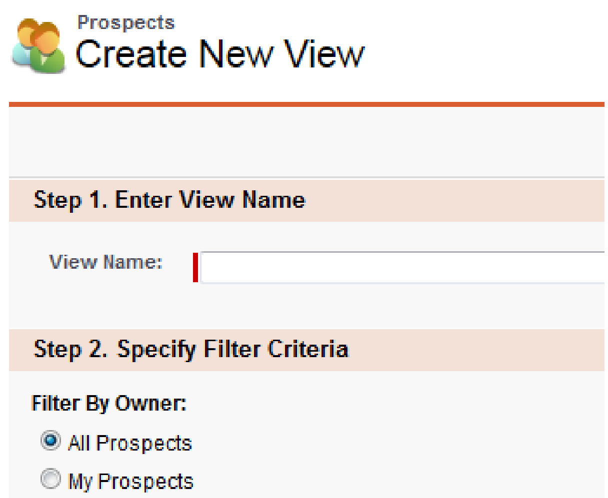
In PMC you can also choose to create your own custom views to quickly access and organize data that is important to you.

To create a custom view:

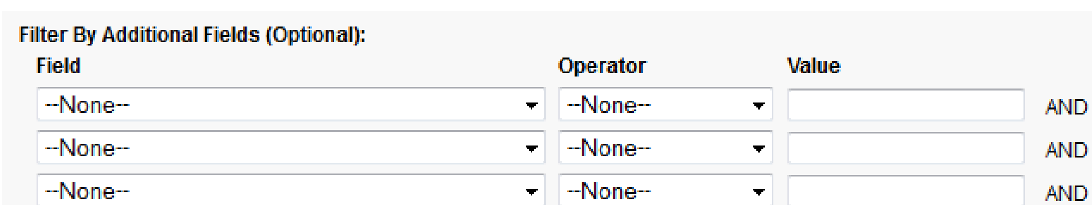
1. Click "create new view" to the right of the view drop down menu



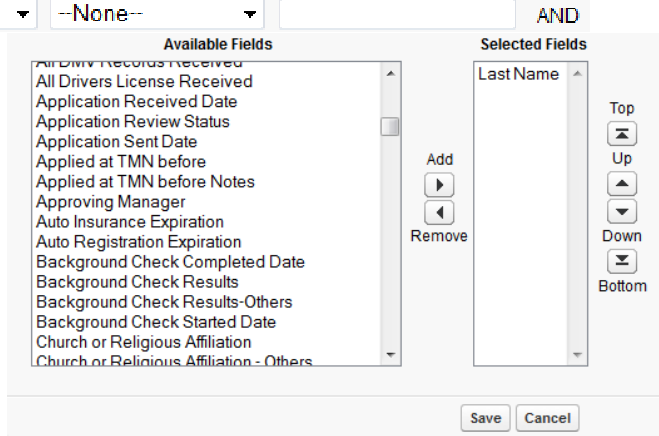
2. Enter a name for your view to help you easily identify it in the dropdown list. For example, "Active Inquiries" to list only those records whose status is set to active, "New Inquiries" to list those that have inquired in the last week or month, "On Hold" to list records with on hold status, etc.



3. Use the filter values to select the criteria you want to see.



4. Choose the fields that you want to display for each record in your view.



5. Save your view.

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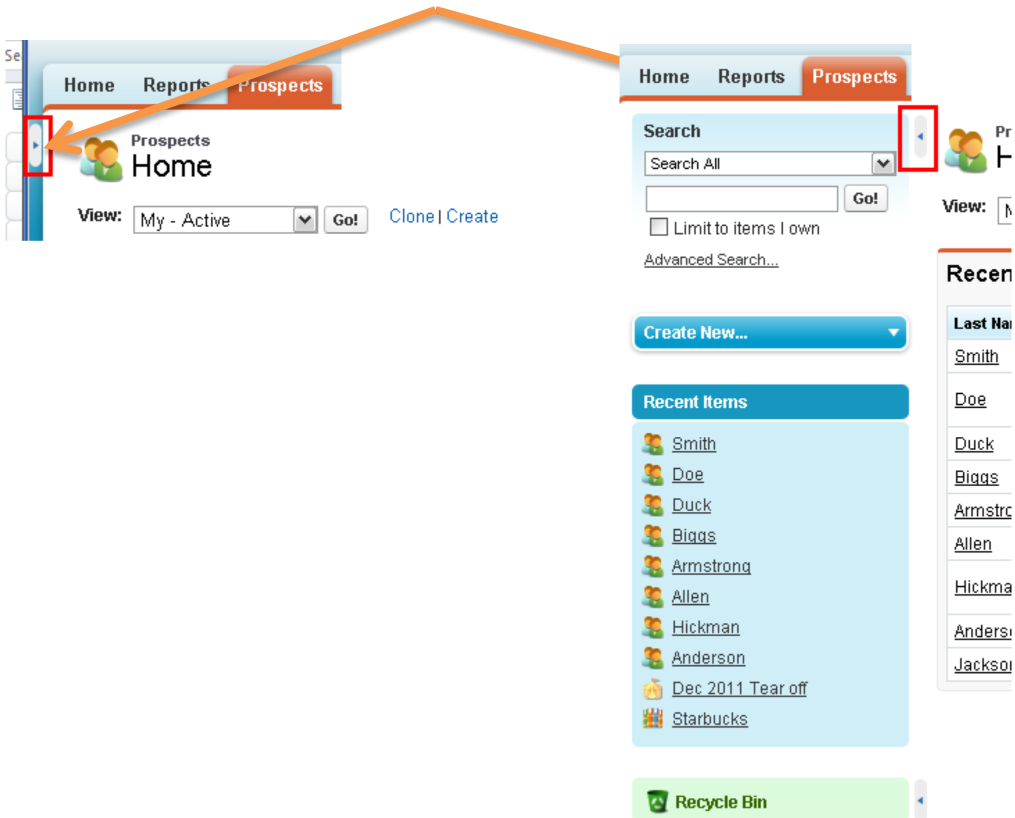
The Sidebar

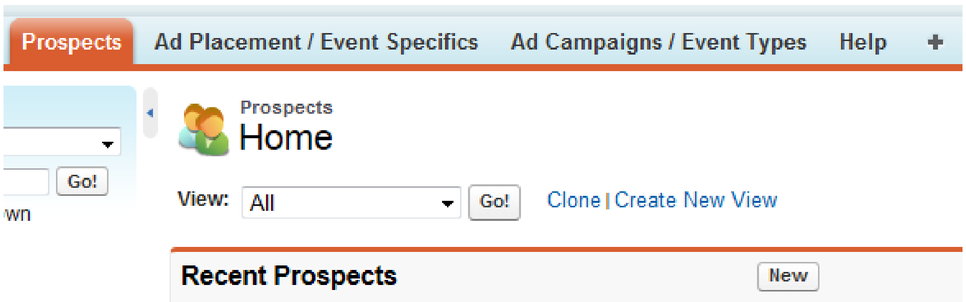
PMC also utilizes a sidebar which can be accessed from the left-hand side of the screen. This sidebar contains quick links the can be used to search, create new records, and list the records you recently viewed. The first time you login, the sidebar will be closed. You can click the arrow icon at any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

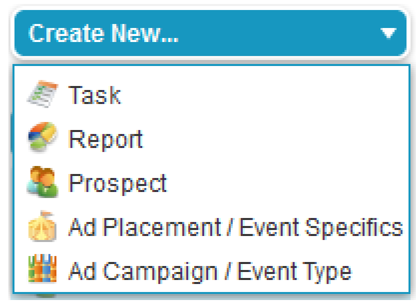


Records

Creating new Records

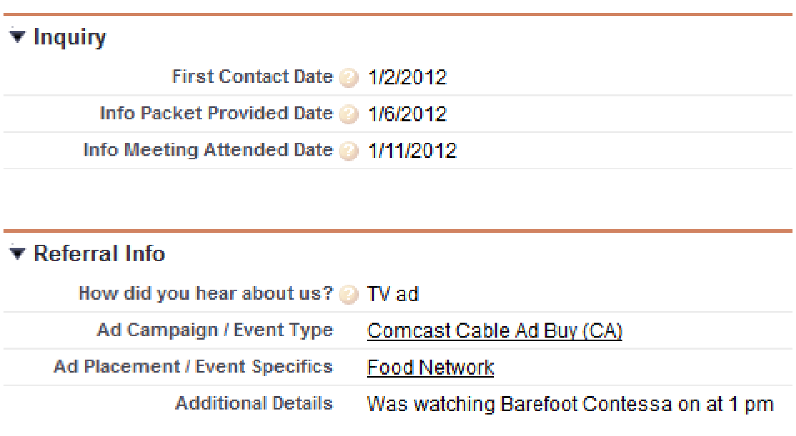
You can create a new record at any time by selecting the desired area of the application using the top navigation tabs, and then clicking the “New” button at the top of the section, **OR**, you can click the “Create New…” link on the sidebar to open a drop-down menu of options.

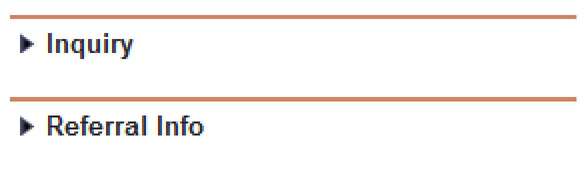




Record Sections

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.





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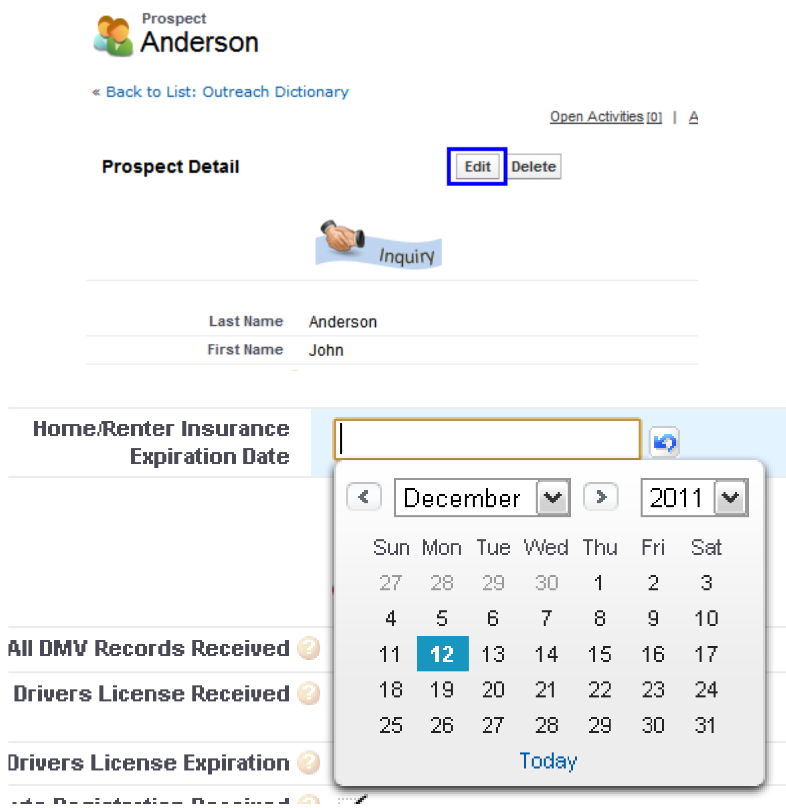
Editing Records

You have the ability to edit the information contained in all of the records that you own, both those that were created manually and those that were assigned to you via the PMC's automated routing feature. As each prospective Mentor progresses through the milestones (more information on milestones can be found in the "Screening" section) necessary in order to become an approved Mentor you will need to update their records to modify existing information or enter new information that you have received.

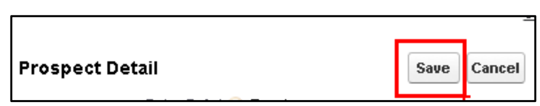
To edit an existing record:

Click on the "Edit" button at the top of the record. This will put the entire record into edit mode and all of the fields will become editable. It is best to use this method when you know that you'll be changing multiple fields of information, **OR**,

Double-click on the field you wish to edit and enter the information. This will put only the selected field into edit more. It is best to use this method when you know that you'll be changing a single field of information.



<u>**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.



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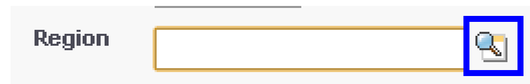
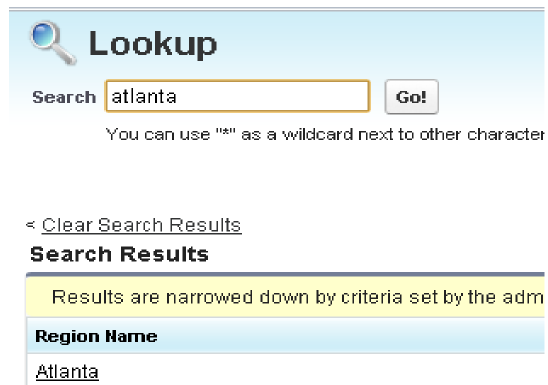
Lookup Fields

Lookup fields provide links to searchable, pre-populated lists of information that are maintained independent of the prospect records. Use of these fields allows the system to collect accurate, consistent information (such as a state name or a region name) without introducing the possibility of misspellings or other inaccuracies during the data entry process. These fields are easily identifiable by the "Search" icon (magnifying glass) to the right of the field.

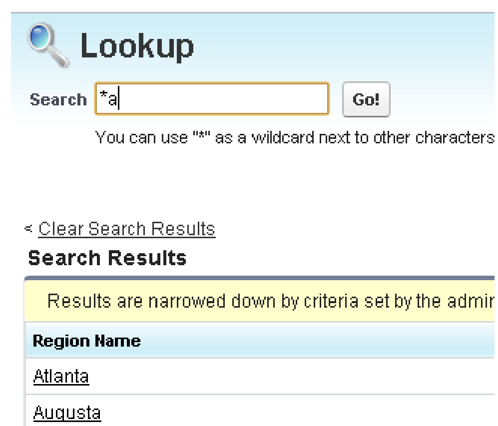
To perform a look up:

1. Click the "Search" icon (magnifying glass) to the right of the field. This will open a new "Search" window.
2. 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 character. Clicking the 'Go!' button with nothing typed in will not return any records. You can also type an asterisk (*) in after the search to find records that are similar to the search keyword. You must type at least one letter, for example, typing "a*" would return all of the records that start with the letter a. Typing only "*" will not return any results.



Changing Ownership of Records

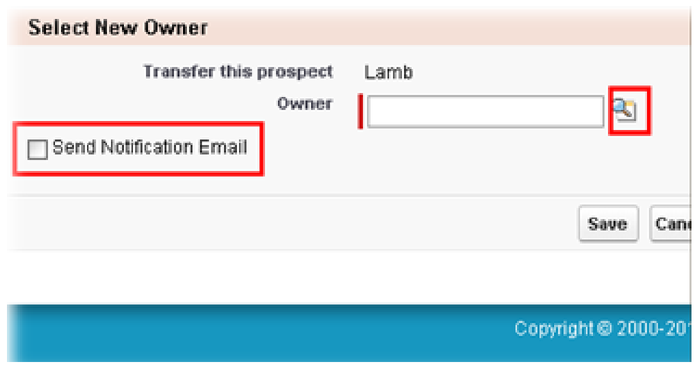
For tracking purposes, each record in the system can only be "owned" by a single user. This ownership is automatically defined either by routing that takes place when an inquiry arrives via the web or when a user manually creates a new record. **It is the responsibility of the owner to keep the information contained within the record accurate and up-to-date.**

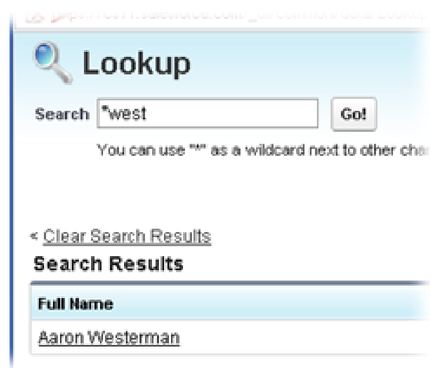
From time to time a record may need to be reassigned to a different owner. This can happen for several reasons with the most common being that the record was either routed improperly or the current owner of the record will be away from the office for an extended period of time.

To change the owner of a single 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. 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. Check the “Send Notification Email” box to send an automated email notification to the new owner of the record, informing them of the change.
5. Click the “Save” button to assign the record to the new owner.





NOTE: You can also type the asterisk wildcard (*) after the name you are entering to return all of the users that are similar to the name you are searching for. You must type at least one letter for example, typing “a*” would return all of the records that start with the letter a. Typing “*” will not return any results.

Changing Ownership of Multiple Records

Occasionally multiple records may need to be assigned to a new owner simultaneously. For example, if a recruiter moves to a new region or leaves the organization, a new recruiter must assume ownership of their prospects so they can continue to build and maintain the relationship with each prospect. When those instances occur you can transfer all of the prospects owned by one individual to another at the same time.

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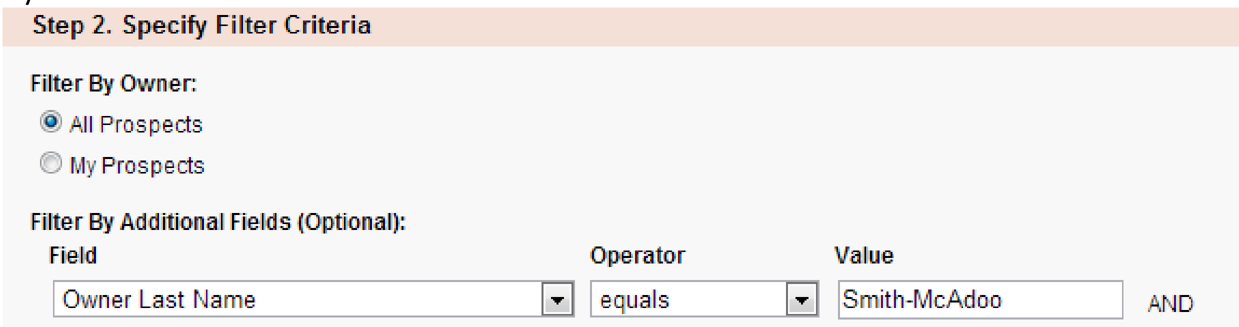
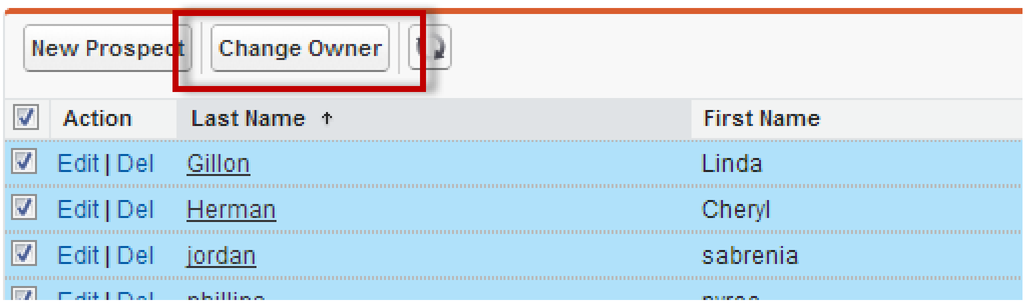
To change the owner of a multiple records:

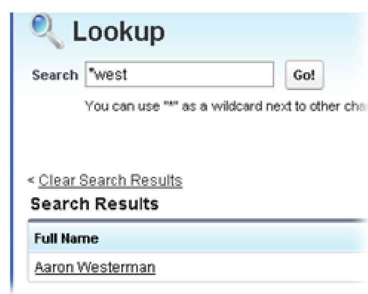
1. First, create a new view (see create new view section for more information) and use the "owner last name" as your filter. Then change the operator to "equals" and type in the last name of the owner you want to transfer records from.



2. Once you select the fields you'd like to see in your view in the available fields section click save. This will return a list of all prospects that need to be transferred to the new owner.
3. Use the select all checkbox at the top of the list in the far left column which will highlight all the selected records.



4. Then click the "change owner" button to look up a new owner and transfer all records. 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.

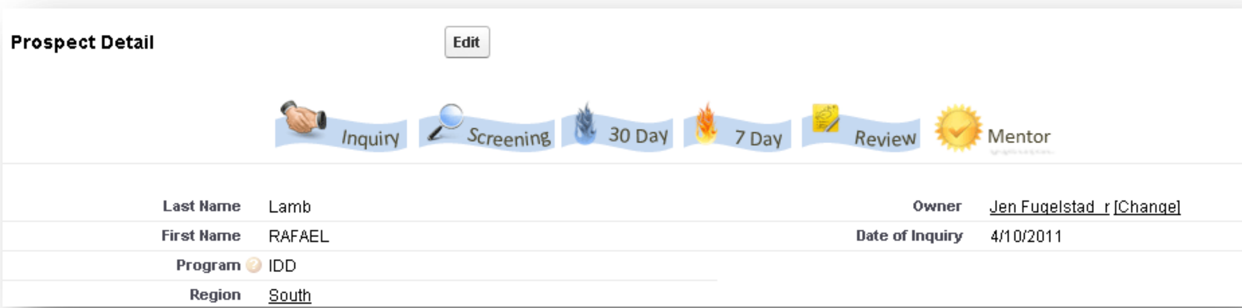


The Prospect Record

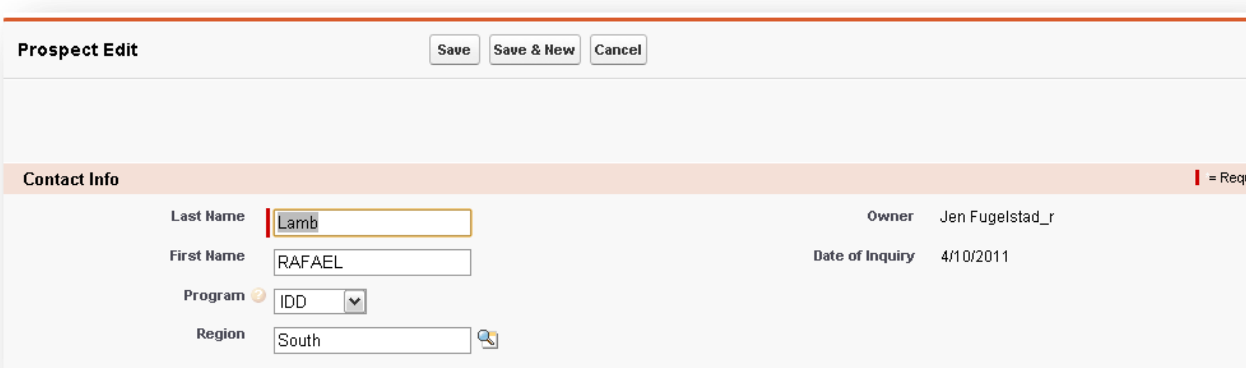
Every prospect record is organized into several sections which each contain multiple fields for capturing unique information about the prospective Mentor. While some are free form, such as typing in the prospect's name and address, many are drop-down menus containing options such as "Pass," "Fail," "Approved," "Rejected, " "Pending," or "Does Not Apply." You must actively select a value for each of these fields in order to move a prospect to the final stage of becoming an approved Mentor. For example, the PMC system will not allow the prospect's status to be set to "Mentor" unless the value of the "Pool Assessment" drop-down field is set to either "Pass" or "Does Not Apply."

When you view a record the prospect detail status bar (shown below) will appear at the top of the record (this is not displayed when you are editing a record). When you are editing a record you will see the "Save," "Save & New," and "Cancel" buttons (as shown in the second screen shot below.)

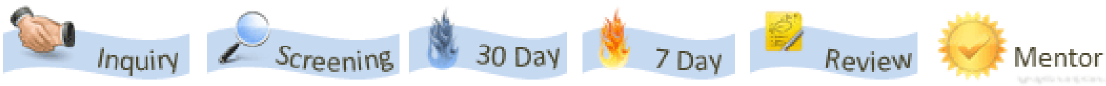
View (Prospect Detail):



Edit (Prospect Edit):



Prospect Stage



When viewing a record, a visual banner located at the top of the page will indicate which stage of the process a prospect is currently in.

Prospects move through stages based on various milestones and events that must be completed prior to becoming an approved Mentor. Currently, stage is determined by the prospect's status in all cases except when the status is "Active." While in the "active" status, prospects will move through the "Inquiry" and "Screening" stages based on various milestones in the system as outlined below.

If the status "30 day," "7 Day," "Review," or "Mentor" has been applied the stage will be the same as the status. Unlike Inquiry to Screening (explained above), you control when to apply these statuses to a prospect. The PMC system will not determine when to place a prospect into "30 day," "7 Day," "Review," or "Mentor" status. These are provided for you to help manage how close you feel a prospect is to completing the process of becoming an approved Mentor.

Please refer to the Status section for more information.

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**	

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Contact Info

Key contact information for the prospect, such as First and Last Name, Address, and Zipcode are entered and stored here. "Last Name", "Owner," "Region," "Program Type" and "State" are required fields. These fields MUST be populated before the PMC system will allow any prospect's "Status" to be set to "Mentor."

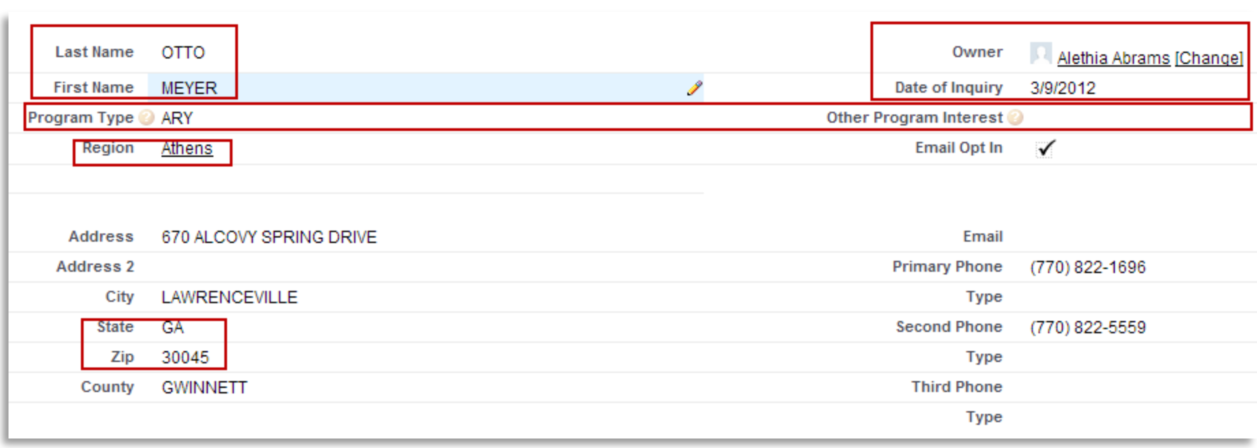
Confirming Program Selections for Web Prospects

If a prospect, comes from the web all of the required fields will be entered automatically based on the prospect's selections on the web inquiry form including their program interest. During initial conversations, with each prospect recruiters should confirm their selections to ensure they are accurate.

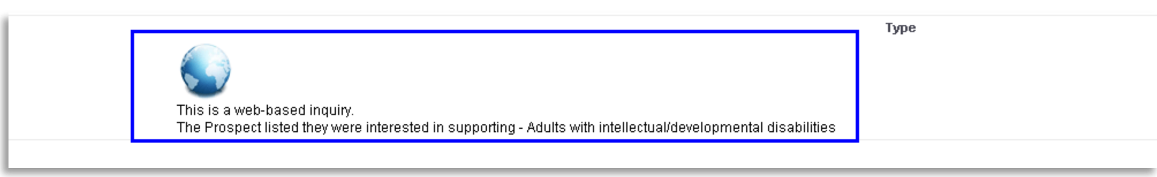
For example, a web prospect may indicate that they want to support children in foster care but the state may only offer adult I/DD programs. If that occurs, recruiters should pitch the IDD program that is currently offered. Assuming the prospect is willing to continue on in the IDD program the program type should be updated accordingly and the "other program interest" field should be used to indicate that the prospect had previously been interested in the ARY program. If the prospect, is not interested in the program offered in your state they should be moved to a "closed-prospect" status indicating that the "type of client was not available" for the closed reason.

Recruiters should also explain the program(s) offered in their state to prospects who list "undecided" and then update their program choice accordingly.

<u>IMPORTANT NOTE:</u> If a prospect's program is not entered accurately it can affect recrutier productivity data and other PMC reports. Please always ensure that a prospect's program type matches up to the program(s) offered in your state.



Last Name	OTTO	Owner	Alethia Abrams [Change]
First Name	MEYER	Date of Inquiry	3/9/2012
Program Type	ARY	Other Program Interest	
Region	Athens	Email Opt In	✓
Address	670 ALCOVY SPRING DRIVE	Email	
Address 2		Primary Phone	(770) 822-1696
City	LAWRENCEVILLE	Type	
State	GA	Second Phone	(770) 822-5559
Zip	30045	Type	
County	GWINNETT	Third Phone	
		Type	



This is a web-based inquiry.
The Prospect listed they were interested in supporting - Adults with intellectual/developmental disabilities

Type

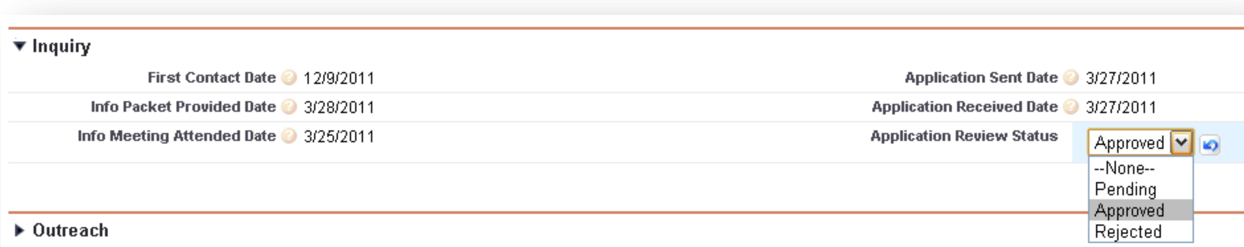
Have questions? Want to share your ideas? Contact us at: PMCRequests@thementornetwork.com or post your thoughts in the "Mentor Recruitment Strategies" group on Chatter.

Milestone/Field	Purpose/Standard of Use
Owner	Indicates the owner of the record. Ideally this is the recruiter who is currently working directly with the prospect.
Region	The local, state-based, region a prospect is assigned to e.g. North or South. Each state has a unquie set of regions.
Date of Inquiry	Displays the date the prospect first inquired about becoming a Mentor. Either the day the prospect provided their information via the web or the date they where entered into the system by a recruiter. If the prospect entered their information via the web a picture of the Earth, along with some text indicating which service line the they are interested in supporting will be displayed. The prospect has three options–from which to select: 1. Adults with intellectual/developmental disabilities 2. Children and Adolescents 3. Undecided
Program Type	The service line the prospect is interested in or approved for (either "Individuals with Developmental Disabilities - IDD" or "At Risk Youth-ARY".)
Other Program Interest	Field to indicate additional program interest. This may be used when a prospect initially selects a program that is not offered in your state but they are willing to move forward in the program that is offered.

Inquiry

Inquiry is the first stage in the prospective Mentor's process. During this stage a recruiter contacts the prospect and provides an informational packet to them as well as encourages them to attend an informational session. Following this step, the prospect should be asked to submit a Mentor 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 a prospect inquired on Monday the target date is Tuesday; if a prospect 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 or other in-person 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

Marketing Info

The fields in this section help determine how the prospect heard about opportunity to become a Mentor. This information is extremely valuable in determining which recruitment strategies and marketing campaigns are the most effective.

When a prospect enters the PMC via the web, the field 'How did you hear about us?' is automatically populated. For manual inquiries, recruiters should select the appropriate source based on their conversations with the prospect. More detailed information can be found in the ROI section.

Field	Purpose
How did you hear about us?	A drop down field found on the self-entry web-form or completed by the recruiter for manual inquires that identifies the source through which the prospect heard about us (tv, newspaper, personal referral, 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.)

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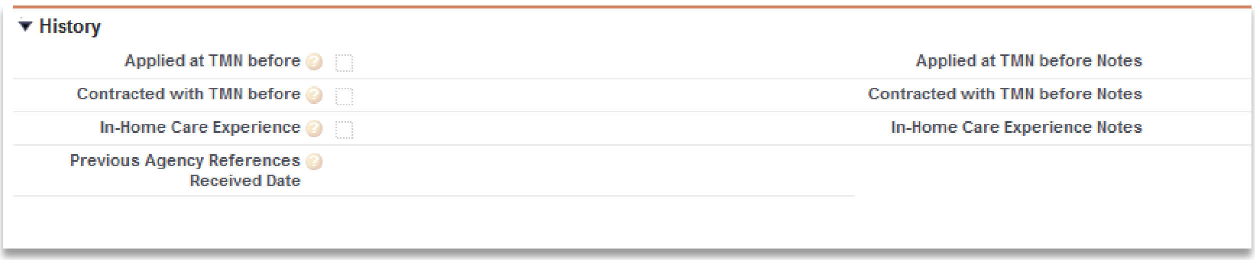
History

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



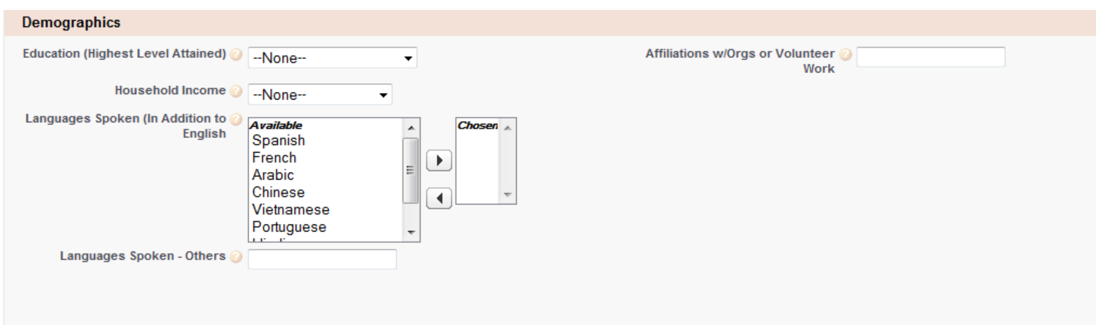
Field	Purpose	Notes
Applied at TMN before	Check this box if the prospect has previously completed a Mentor application at TMN before	
Contracted with TMN before	Check this box if the prospect has previously been a Mentor at TMN	Notes are required if this box is checked
In-Home Care Experience	Check this box if the prospect has been a Mentor at another agency	Notes 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

These fields will help us better understand the different types of people that are attracted to becoming a Mentor and the characteristics of prospects that successfully complete the application process. In some cases, Recruiters may opt to enter the information into PMC system based on the Mentor Contract Application submitted and their interview with the prospect.

There are two classes of demographic information: Protected and Non-protected. Non-protected classes may be collected at any time but protected classes may only be collected after the Mentor is approved.

Non-Protected (may be collected at any time)	Protected (may only be collected after the home is approved)
Education	Ethnicity/Race
Income	Church Affiliation
Languages	Gender
Volunteer Orgs	Age
	Relationship Status



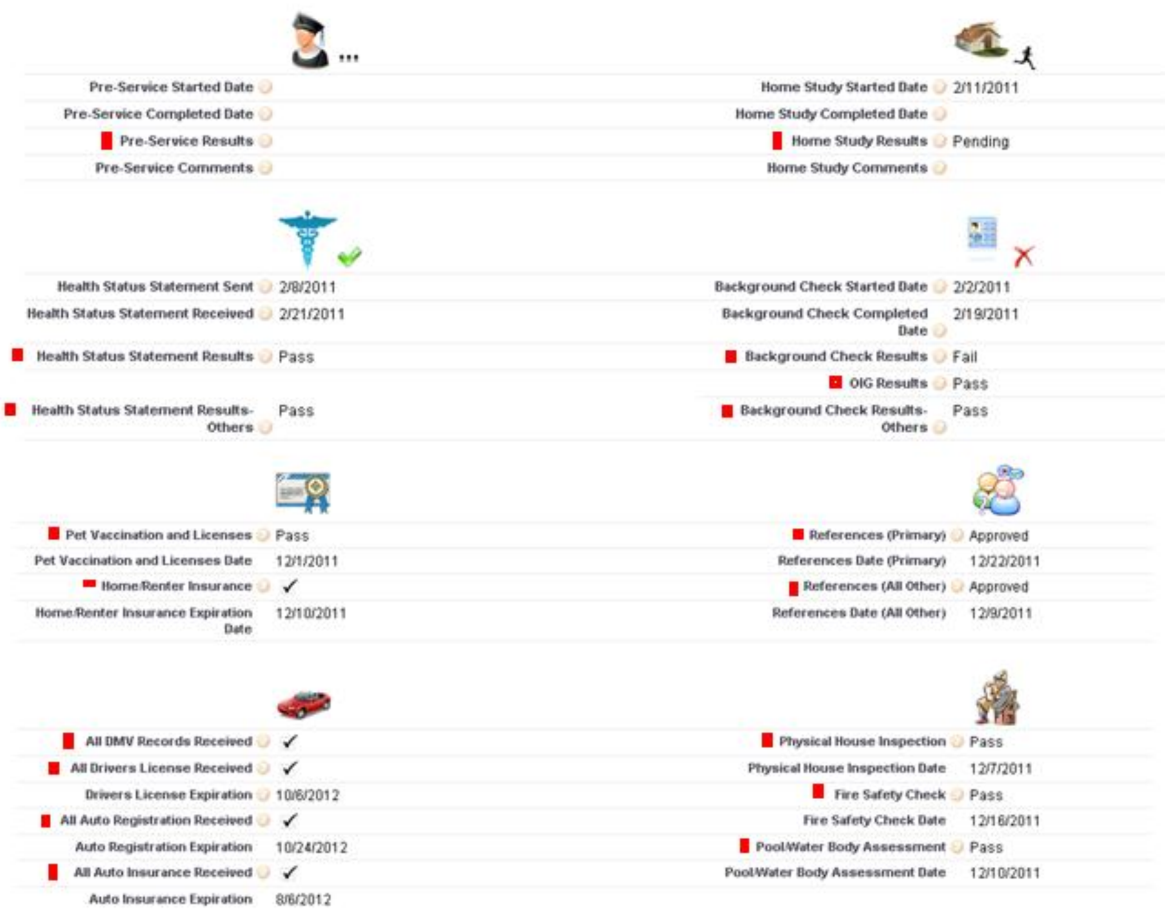
Demographic Fields	Purpose
Education	Highest education level attained by the prospective Mentor. Prospective Mentors provide this information on the Mentor Contract Application. A drop-down list is provided for this field
Household Income	Household income for the prospective Mentor. A drop-down with 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

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 "Review" and each milestone has associated date fields attached to it. Most of the milestones are drop-down items which indicate Pass/Fail or Approved/Rejected as each is completed.

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 milestones. The other fields are supplemental.



Pre-Service Started Date		Home Study Started Date	2/11/2011
Pre-Service Completed Date		Home Study Completed Date	
Pre-Service Results		Home Study Results	Pending
Pre-Service Comments		Home Study Comments	
Health Status Statement Sent	2/8/2011	Background Check Started Date	2/2/2011
Health Status Statement Received	2/21/2011	Background Check Completed Date	2/19/2011
Health Status Statement Results	Pass	Background Check Results	Fail
		OIG Results	Pass
Health Status Statement Results-Others	Pass	Background Check Results-Others	Pass
Pet Vaccination and Licenses	Pass	References (Primary)	Approved
Pet Vaccination and Licenses Date	12/1/2011	References Date (Primary)	12/22/2011
Home/Renter Insurance	✓	References (All Other)	Approved
Home/Renter Insurance Expiration Date	12/10/2011	References Date (All Other)	12/9/2011
All DMV Records Received	✓	Physical House Inspection	Pass
All Drivers License Received	✓	Physical House Inspection Date	12/7/2011
Drivers License Expiration	10/6/2012	Fire Safety Check	Pass
All Auto Registration Received	✓	Fire Safety Check Date	12/16/2011
Auto Registration Expiration	10/24/2012	Pool/Water Body Assessment	Pass
All Auto Insurance Received	✓	Pool/Water Body Assessment Date	12/10/2011
Auto Insurance Expiration	8/6/2012		

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."

Have questions? Want to share your ideas? Contact us at: PMCRequests@thementornetwork.com or post your thoughts in the "Mentor Recruitment Strategies" group on Chatter.

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

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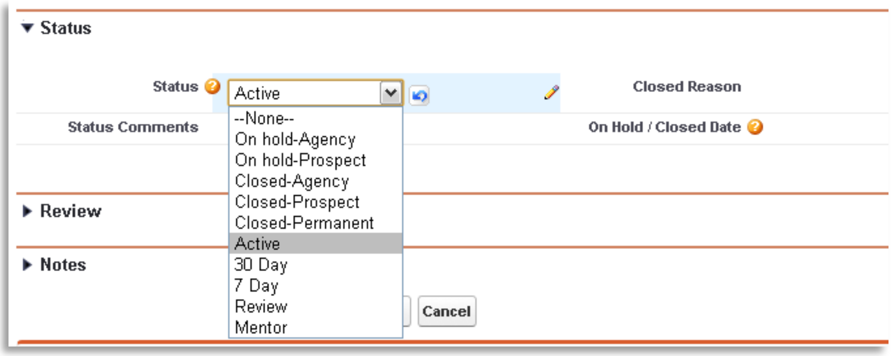
Status

The “Status” field identifies the current status 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 a manager can approve a prospect as a Mentor.

Note: You control what status to give a prospect; the system does not determine when to change the status field other than setting the prospect to “active” when they enter PMC via the web or are created manually by a recruiter.



Prospect Status Definitions

Status	Use this Status when…	*Notes*
Active	The active status is assigned to prospects who are in the inquiry and screening stages. In some cases, an active status will indicate that a prospect has recently inquired and recruiters have made or are trying to make contact with the prospect. An active status can also represent prospects that are moving through the steps in the screening stage.	*New prospect will be at this stage by default*
30-day	Prospects may be moved to the 30-day status at the discretion of the recruiter but should indicate prospects that are approximately 30 days from becoming an approved Mentor. 30-day prospects should be in the final stages of screening, have a final home walk-through scheduled and be close to completing any remaining documentation.	*Used at the discretion of recruiters*
7 –day	Prospects may be moved to the 7-day status at the discretion of the recruiter but should indicate prospects that are approximately 7 days from becoming an approved Mentor. Recruiters should use the 7-day status once they have completed the written assessment/recommendation for approval and all of the screening milestones have been completed so the file can be sent in for review.	*Used at the discretion of recruiters*

Review	Once a prospect has completed all screening steps required to be a Mentor, they may be moved to the Review stage. During this stage, their file will be reviewed by a recruiter's manager who will determine if they will be an approved Mentor. If a prospect is ready for review, recruiters should use the notification function in PMC to send their manager an email indicating they have a prospect ready for review.	*May only be used once prospect has completed all screening milestones.*
Mentor	Once a manager has marked the review field as approved and filled in the provider agreement signature date the status may be set to Mentor.	*May only be used once the review is marked as approved by the manager. Indicates the process is complete; will be used for recruiter productivity data.*
On Hold	The On Hold status may be used once a prospect has completed the inquiry stage but is temporarily unable to continue on in the screening & selection process. By placing a prospect in the On Hold status it indicates they have formed an initial relationship with the organization and will likely continue on in the process at a later date. a. **On Hold - Prospect –** Use this status when a prospect has not returned calls (post inquiry stage), indicates they need more time, has a medical/family issue that will be resolved, etc. b. **On Hold - Agency –** Use this status when a prospect does not currently meet requirements but may do so in the future, their area is not currently served, etc.	*Status comments and date are required*
Closed	When communication between recruiter and prospect has been unsuccessful, the agency determines the prospect is not appropriate or other situations that prohibit moving forward, the prospect may be moved to closed status. a. **Closed - Prospect (at prospect's decision) –** Use this status when a prospect has not returned any of the contact attempts, prospect indicated that they were no longer interested, or selected another agency, etc. b. **Closed – Agency (at agency's decision) –**Use	*Closed reason and date are required*

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	this status when a prospect does not meet Network or state requirements, services are no longer offered in their area, etc.

Review

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.

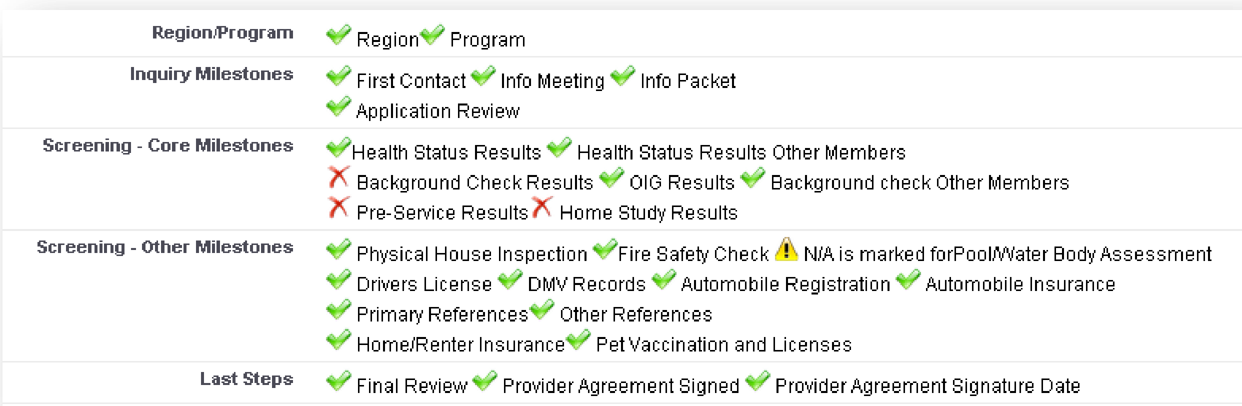
Acceptable:

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

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

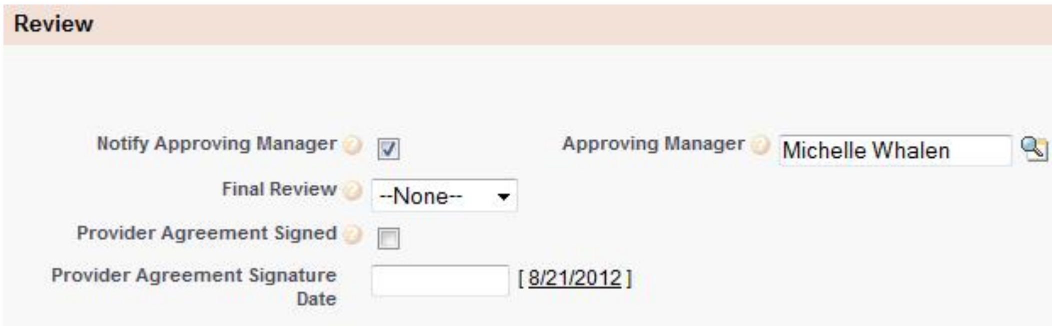
Unacceptable:

- Red X’s indicate that the field is blank or an unacceptable value (like “Fail”) has been selected.



Manager Notification

The PMC allows a recruiter to enter the name of an approving manager to a prospect record and then notify that manager when they have a Mentor ready for final review/sign-off. This is intended to reduce concerns over potential lag time in the approval process.

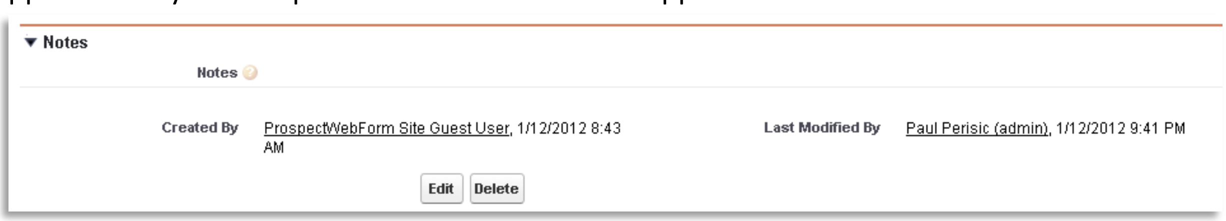


Field	Purpose
Final Review	Manager must indicate approved when a prospects record has been reviewed and approved. **Only Managers/Supervisors have the ability to change this field.**
Provider agreement signed	Check this box after the prospect has signed the general provider agreement. **Once this contract has been signed the status can be set to Mentor.**
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.

Notes

Use this section to add any overall notes to a prospect's record (you will also find notes fields specific to other sections of the prospect's record). If the inquiry was web-based, you will see a visual indicator here. The creator of the record, the user who last modified the record, and the date and time of the last status change will all be displayed here.

CAUTION: It is important to keep in mind privacy concerns with regards to sensitive health information. As recruiters regularly act as back-ups for other recruiters and recruiters in the same regions will have access to each other's information, any privacy data about a prospect should not be documented. This same rule applies for any of the open notes fields within the application.



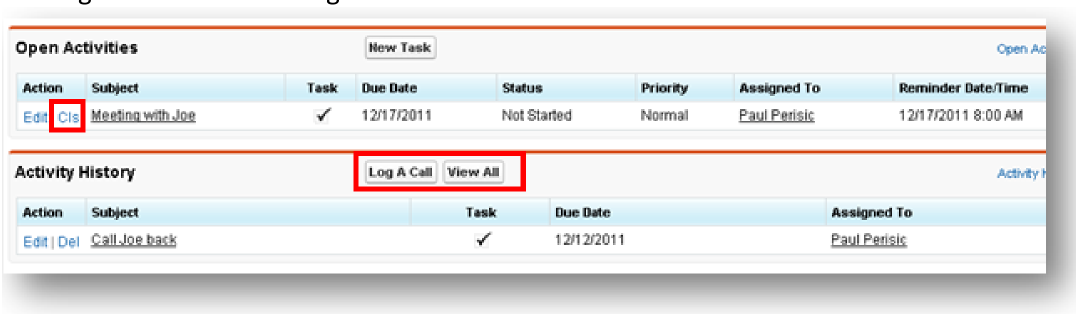
Have questions? Want to share your ideas? Contact us at: PMCRequests@thementornetwork.com or post your thoughts in the "Mentor Recruitment Strategies" group on Chatter.

Tasks

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.

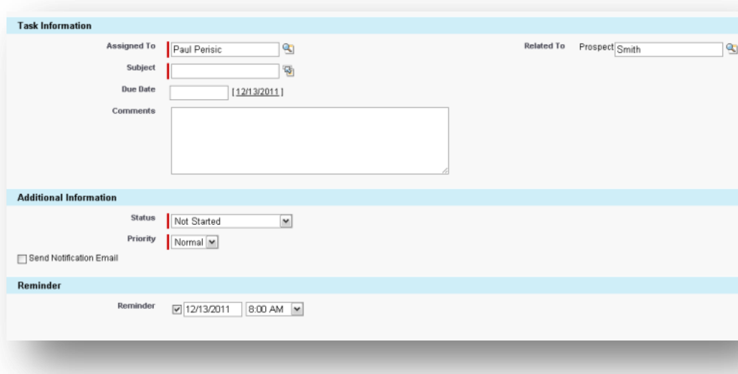
The "Open Activities" area shows a list of tasks that are incomplete.
The "Activity History" area shows a list of tasks that have been completed.

- 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

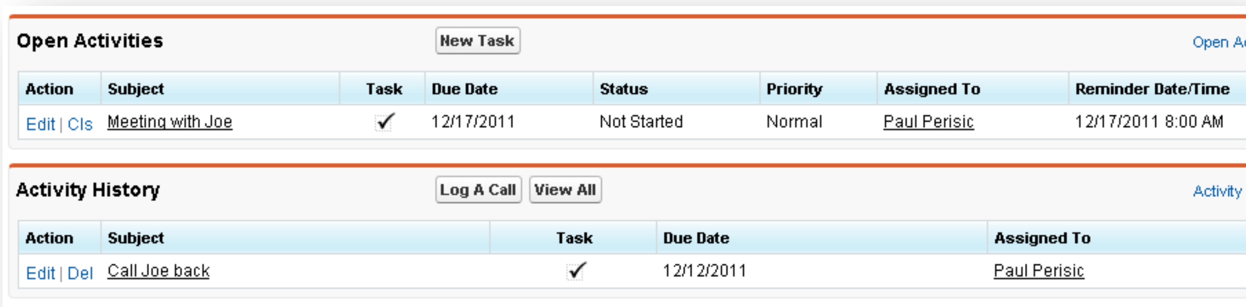
To create a new task:



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.

Logging a Call

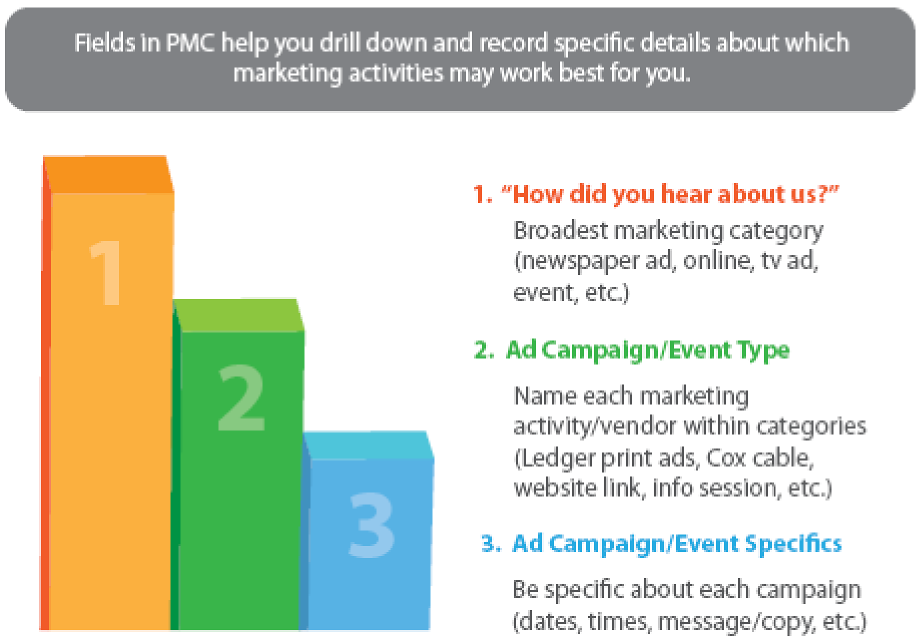
Logging a call is a quick and easy way to document that you had a conversation with a prospect on a certain date and time and it allows you to also enter some brief notes about the discussion. To log a call, simply click on the "Log A Call" button under the "Activity History" header and then follow the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



Return on Investment (ROI)

A critical step in Mentor recruitment is collecting data on where our prospects are coming from and what marketing strategies work best to attract prospective Mentors. Using the PMC you can also capture the return on investment (ROI) for each activity in your recruitment marketing plan which can assist you in refining your marketing strategies.

Recruiters should collect this data by asking the prospect a series of questions designed to obtain specific details about how each prospect heard about the opportunity. Below is an overview of the fields in PMC designed to help you gather ROI data:

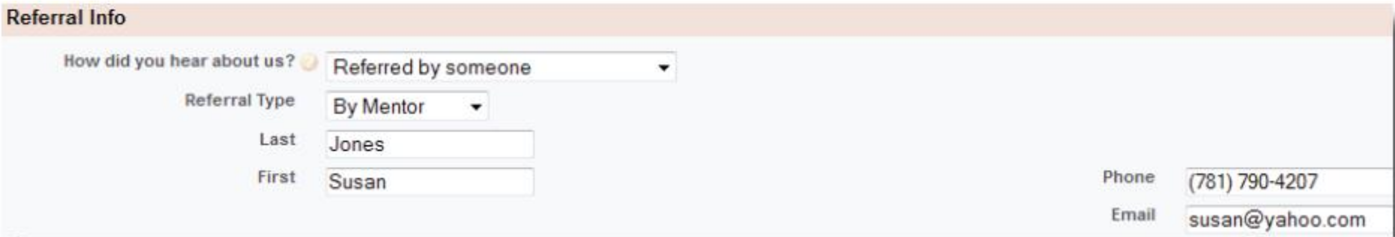


:

To capture ROI information:

1. **Ask "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 however recruiters should always ask the prospect again to ensure they accurately chose from the drop-down menu online. If they do not come through the website, this field must be populated manually when the recruiter first has contact with the prospect. **Be sure to ask how they heard about us.**

   If the prospect indicates that they were referred by someone, you will need to fill out additional fields – including the referring party's name and contact information—which will assist us in tracking the effectiveness of The Network's Mentor Referral program.

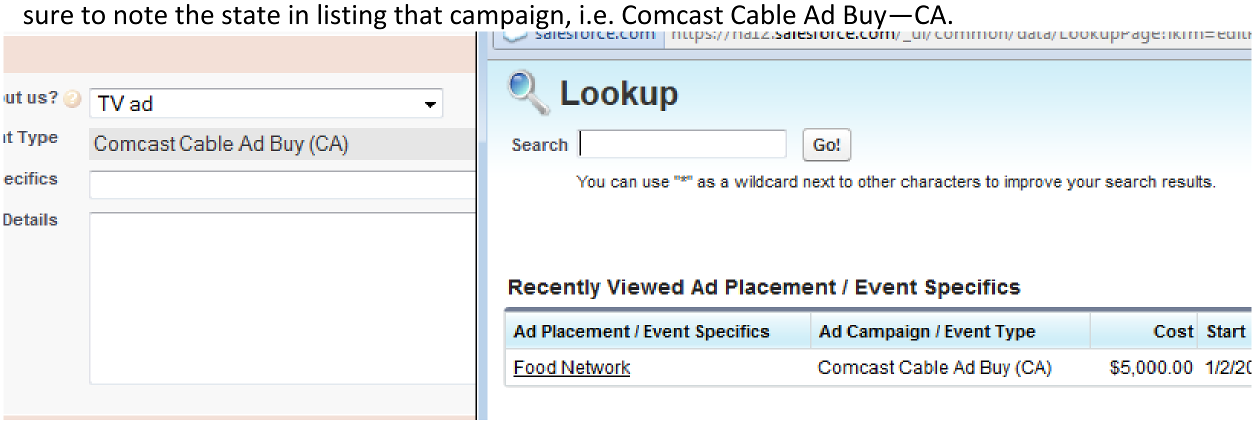


2. **Identify Ad Campaign/Event Type**. This is the specific information about the advertising buy, event type or other marketing activity. Examples of an advertising buy would be a statewide TV ad buy from Charter Communications or a newspaper ad in the Atlanta Journal Constitution. Examples of an event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

   This field is dependent on the "How did you hear about us?" 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. In addition, some national campaigns, such as the recent Mentor and employee mailers, are already set up in the PMC so you can select them from a pick list if the prospect tells you that was how they heard about us. If the campaign you are looking for 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 include 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 above). 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.

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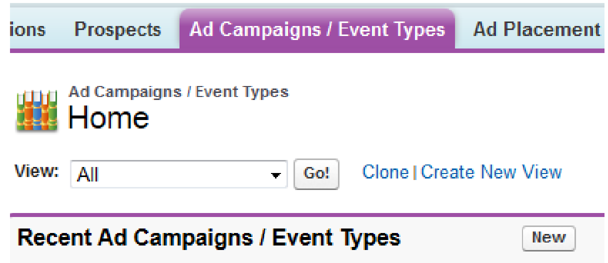
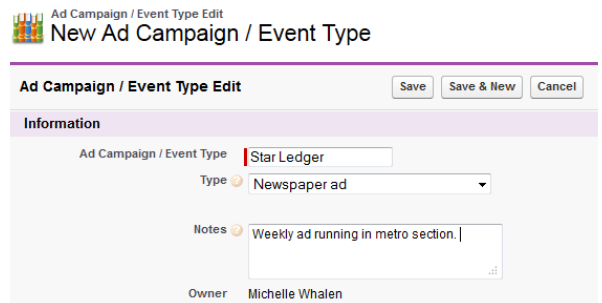
Creating Campaigns

To create a new Ad Campaign / Event Type:

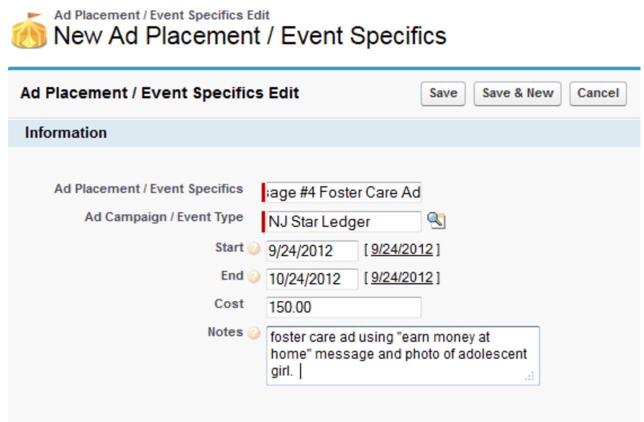
1. Click the “Ad Campaign / Event Type” tab.
2. Click the “New” button.
3. Enter a name for the “Add Campaign / Event Type.”
4. Select a type from the drop-down menu. This categorization helps define when the “Add Campaign / Event Type” will appear as a selectable option.
5. Enter any additional notes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





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”

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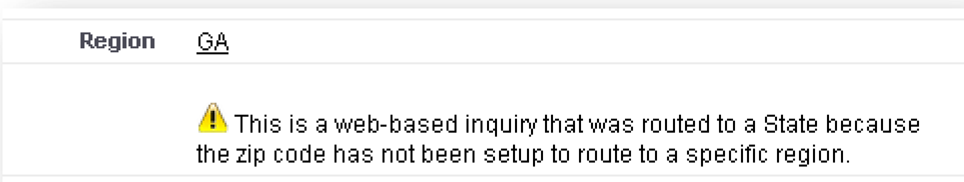
Routing

Automatic routing will occur for prospects entering the PMC system via the web. The routing of the prospect information is determined by the zip code they enter. Each zip code will route to a specific region and each region will have recruiter(s) assigned. To see what region a zip code routes to, search the zip from the Search box located to the right of the TMN logo. If a zip code is not entered into PMC 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: In these cases, the prospect will be assigned to the "state administrator" who should update the prospect's region to the closest local region as quickly as possible. Once that is complete, the prospect will be assigned to the recruiter in that region. In addition, 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.

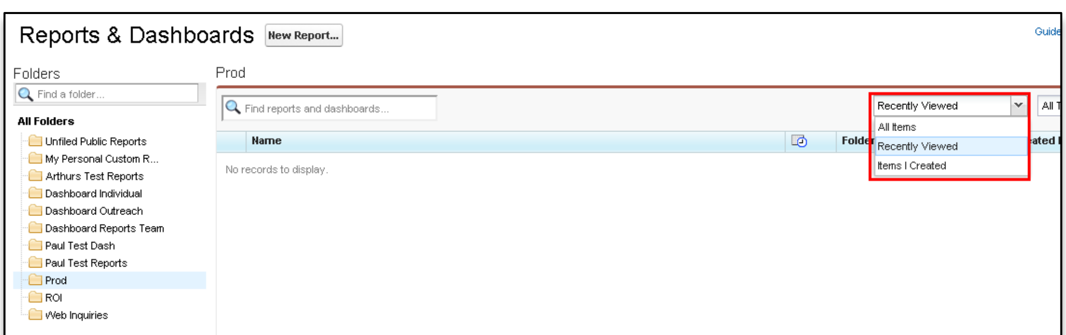


Reports

The “Reports” area in PMC allows you to run real-time reports on the data that has been entered into the system to track and analyze trends. PMC includes standard reports that are accessible by all PMC users. In addition, users can choose to customize existing reports below or create their own.

Report Title	In Folder	Summary	Intended Audience
Closed by Reason	Closed/OnHold	Shows reasons why prospect was moved to closed status.	Recruiters/Recruiter Managers
Monthly Prospect Development	Productivity	Shows the number of prospects for each recruiter by stage grouped by the month the prospect was entered into PMC	Recruiters/Recruiter Managers
Prospect Pipeline	Productivity	Shows the number of prospects that have completed various milestones and the percentage of total prospects that have reached each milestone. This report is grouped by state/program.	Recruiters/Recruiter Managers
Recruiter Productivity YTD by State/Program	Productivity	Shows the number of new inquiries, approved Mentors and conversion rates grouped by state and program.	Recruiters/Recruiter Managers/Program Managers
Count of Inquiries by Source	ROI	Shows the count of inquiries associated with each Ad Campaign / Event Type Source by month	Recruiters/Recruiter Managers/Program Managers
Operating Groups & Regions	Reference Reports	Shows the response email template used for prospects by region including the business name and phone number referenced in the email	State Administrators
State Administrator List	Reference Reports	A list of users with "state administrator" privileges who are responsible for changing Route To information	Recruiters/Recruiter Managers

NOTE: The view in the “Reports” area will always default to recent items. Also it is important to remember that simply clicking on a report name does not show the up-to-date information. You must click the “run report” button to see real-time data.

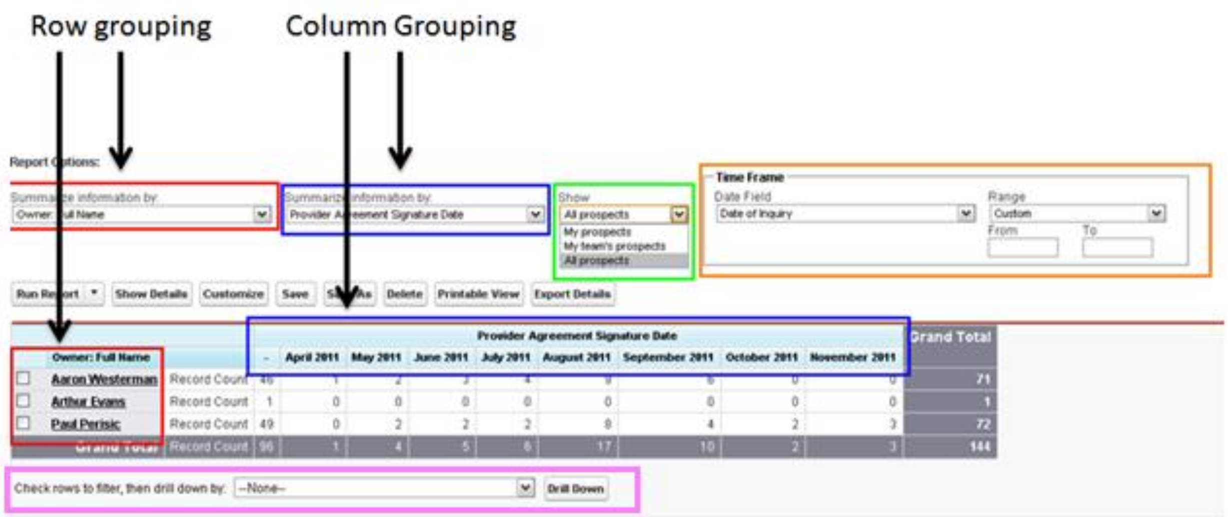


Have questions? Want to share your ideas? Contact us at: PMCRequests@thementornetwork.com or post your thoughts in the “Mentor Recruitment Strategies” group on Chatter.

Adjusting Reports

Every report in PMC provides additional options to organize and filter information as needed—so you see only the data you want. Before running 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



Customizing Reports

In addition to adjusting the report using the fields above you can also customize the report to meet your specific needs by adding and/or removing fields, changing the order of fields displayed, adding filters, etc. To customize a report click the "customize" button and drag and drop fields as necessary. You can also choose to add a chart to visually display the information contained in the report.

Once you've customized the report to meet your needs you can then save it in your own "personal custom reports" folder so that it's ready for you to run anytime.

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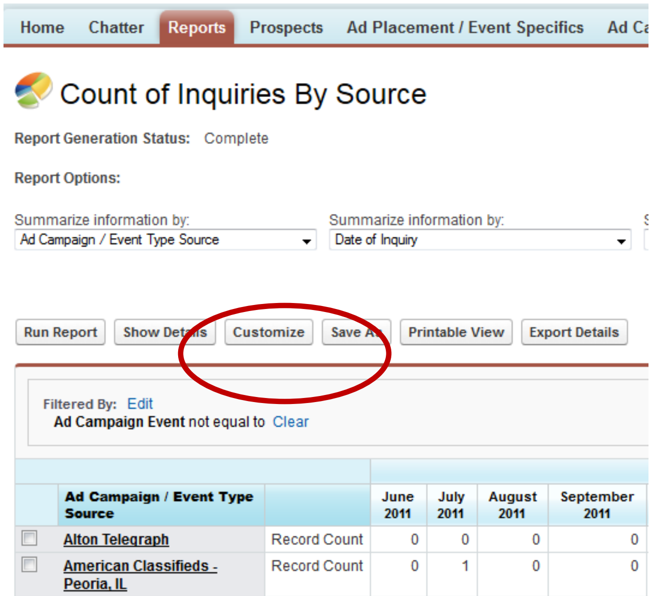

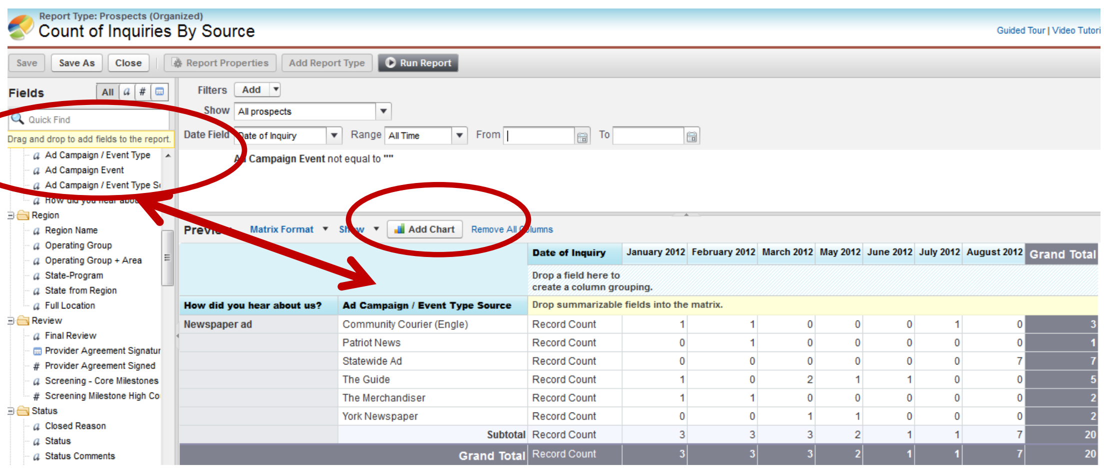

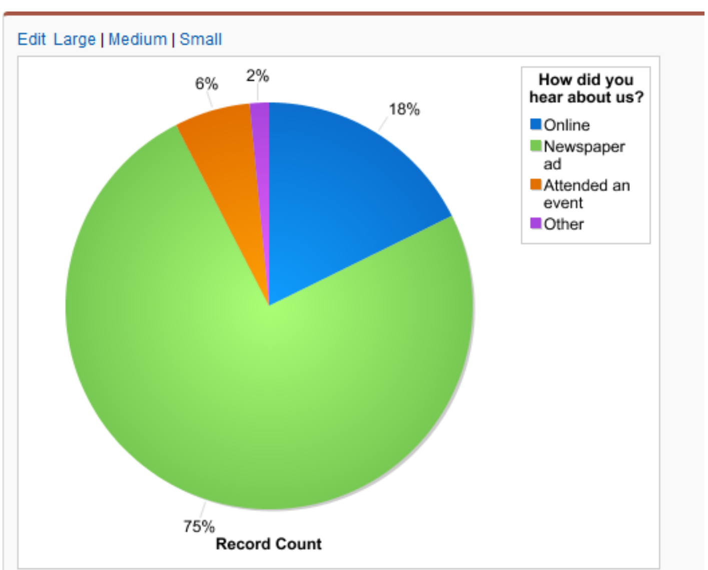

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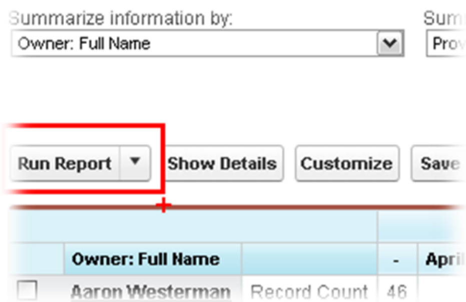
Examples of Making Report Changes

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

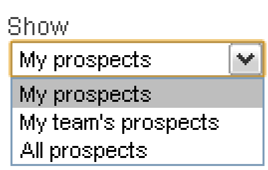


Report used in the examples -

			Provider Agreement Signature Date									Grand Total
	Owner: Full Name		-	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 -

			Provider Agreement Signature Date								Grand Total
	Owner: Full Name		-	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

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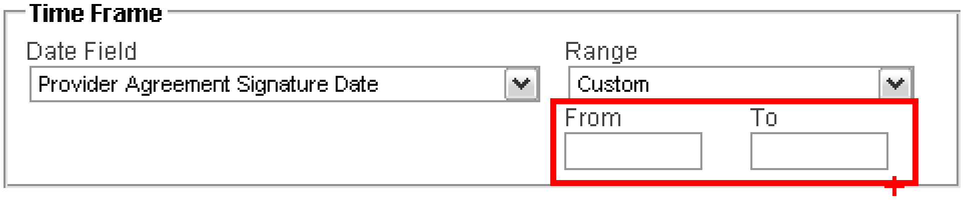
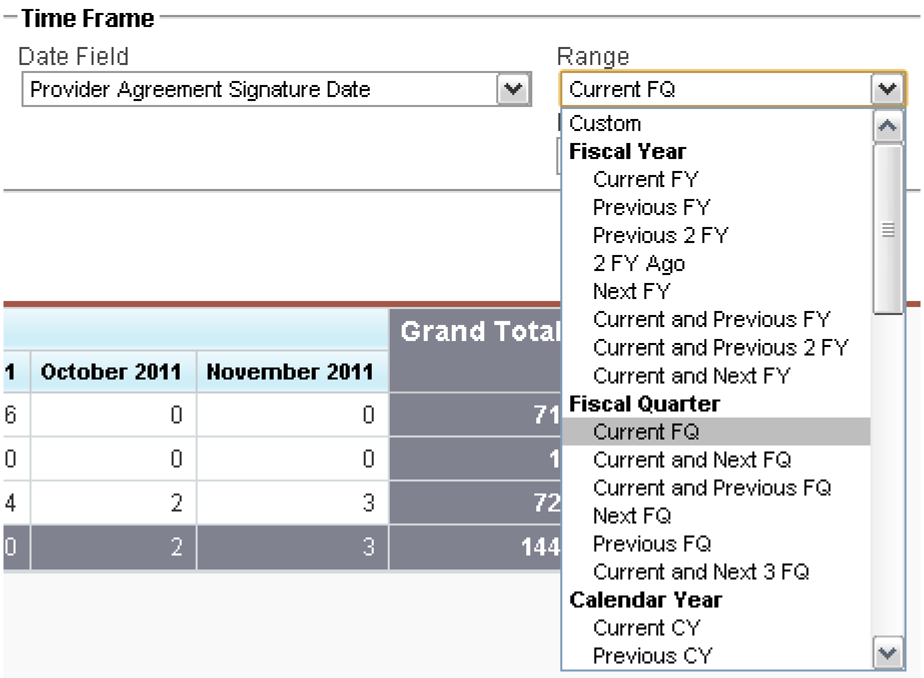
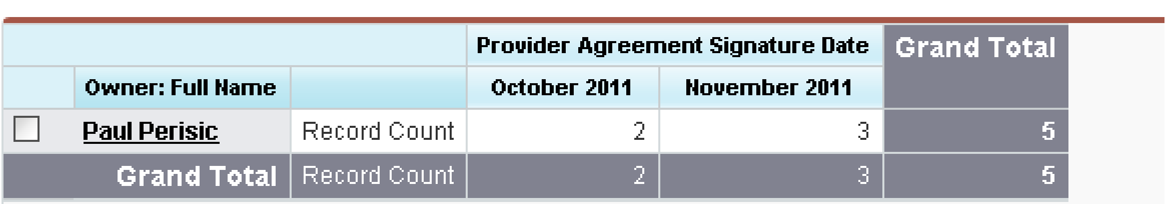
--Timeframe--

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 -



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

Have questions? Want to share your ideas? Contact us at: PMCRequests@thementornetwork.com or post your thoughts in the "Mentor Recruitment Strategies" group on Chatter.

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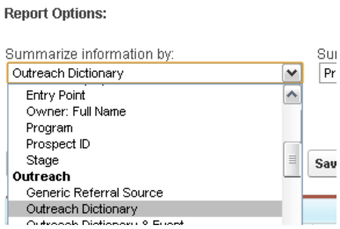
--Row and Column Grouping--

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]

Have questions? Want to share your ideas? Contact us at: PMCRequests@thementornetwork.com or post your thoughts in the "Mentor Recruitment Strategies" group on Chatter.

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Scheduled Reports in SSRS

In addition to the reports available on-demand in PMC, reports are also distributed by email to various stakeholders through a Standard Sequel Reports Server (SSRS). SSRS reports are used by PMC users as well as state, regional and operating group leadership to analyze recruitment data and measure progress. Below is an overview of the key reports built in SSRS and who they are distributed to.

Report Title	Purpose	Schedule	Recipients
Prospect Pipeline	Tracks status of inquiries across the organization and enables conversion rate tracking and forecasting. Reports for operating group, region, state and recruiter detail levels.	Weekly	All Levels
Recruiter Productivity	Tracks recruiters productivity and conversion rates	Monthly	All Levels
Day 3 Inquiries	Notifies recruiters and managers of new inquiries that have not received a response in 3 business days	3X Per Week	Recruiters
Day 5 Inquiries	Notifies managers of new inquiries that have not received a response in 5 business days	Weekly	Managers
Day 10 Inquiries	Notifies state directors of new inquiries that have not received a response in 5 business days	Bi-Weekly	State Directors
Duplicate Inquiries	Notifies recruiters & managers of duplicate inquiries. Recruiters may then request that managers delete record no longer needed.	Weekly	Recruiters & Managers
Data Clean Up – State Administrators	Shows prospects with inactive owners which can be assigned to new recruiters and regions with inactive route-to's to update routing table.	Weekly	State Administrators

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Appendix A: Views

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

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Appendix B: Contacting the ITSC

When to Contact the ITSC

Based in North Andover, the ITSC is a fully staffed service center that handles over 3,000 calls a month and supports over 6,000 computers on our company's network. They support the following functions for the PMC:

- Password Issues / Account Lockouts
- New User Requests
- Account Deactivation Requests

All other feedback, questions, or ideas related to the PMC should instead be directed to PMCRequests@thementornetwork.com. Also when contacting the ITSC for PMC issues please copy the PMCRequests mailbox.

How to Contact the ITSC

The hours of operation for the ITSC are Monday thru Friday, 8am – 8pm EST and they can be reached two ways:

- Email: ServiceCenter@TheMentorNetwork.com (Service Center in the Outlook global address book). This option should be used for non-urgent issues only. All emails requests will be responded to within 48 hours. For the PMC issues stated above going to the service center please also cc' PMCRequests@thementornetwork.com
- Phone: 888-774-4872 This option should be used for urgent issues.

When contacting the ITSC for support, please be ready to:

- Be at the problem computer or device
- On a follow-up call, provide your incident ticket # (if applicable)
- Provide Your Name, Location (office, city, state) & Contact Information
- Provide a secondary contact number if you will be out of the office, but your problem is time sensitive
- Provide the name of the problem application (Prospective Mentor Connector-PMC)
- Provide any error messages which may have appeared.

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Appendix C: Roles

Roles allow users to view data sets based on system hierarchy and area of responsibility. Users may access all data within their own role and any lower roles. Lower roles are indicated by colon/indent and contain their parent role name. When requesting a new account for PMC please select the appropriate role from the list below:

Role	Reports To
TMN	
Cambridge	TMN
CB North	Cambridge
CT	CB North
DE	CB North
IL - ARY	CB North
IL - ARY : Marion	IL - ARY
IL - ARY : Matteson	IL - ARY
IL - ARY : O'Fallon	IL - ARY
IL - ARY : Peoria	IL - ARY
IL - ARY : Rockford	IL - ARY
IN - ARY	CB North
IN - ARY : Fort Wayne	IN - ARY
IN - ARY : Indianapolis	IN - ARY
IN - ARY : Lake County	IN - ARY
IN - ARY : Marion County	IN - ARY
IN - ARY : Merrillville	IN - ARY
MA	CB North
MA : Boston	MA
MA : Hyannis	MA
MA : Lawrence	MA
MA : New Bedford	MA
MA : Pittsfield	MA

MA : Springfield	MA
MA : Taunton	MA
MA : Worcester	MA
NC	CB North
NC : East	NC
NC : Jacksonville	NC : East
NC : Raleigh	NC : East
NC : Rockingham	NC : East
NC : Wilmington	NC : East
NC : West	NC
NC : Charlotte	NC : West
NC : Greensboro	NC : West
NC : Hendersonville	NC : West
NJ	CB North
NJ : North	NJ
NJ : South	NJ
OH - ARY	CB North
OH - ARY : Akron-Canton	OH - ARY
OH - ARY : Cincinnati-Dayton	OH - ARY
OH - ARY : Cincinnati	OH - ARY : Cincinnati-Dayton
OH - ARY : Dayton	OH - ARY : Cincinnati-Dayton
OH - ARY : Cleveland	OH - ARY
OH - ARY : Columbus	OH - ARY
PA	CB North
PA : Central	PA
PA : Northeast	PA

PA : Southeast	PA
PA : West	PA
RI	CB North
CB South	Cambridge
AL	CB South
AL : Attala	AL
AL : Auburn	AL
AL : Birmingham	AL
AL : Florence	AL
AL : Madison	AL
AL : Mobile	AL
AL : Montgomery	AL
AL : Tuscaloosa	AL
FL	CB South
FL : A	FL
FL : A : Sarasota	FL : A
FL : A : Suncoast	FL : A
FL : Broward/Plantation	FL
FL : Central	FL
FL : Ft. Myers	FL
FL : Gainesville	FL
FL : Jacksonville	FL
FL : Lakeland	FL
FL : Miami Dade	FL
FL : Northeast	FL
FL : Ocala	FL
FL : Orlando/Maitland	FL
FL : Southeast	FL
FL : Stuart/Port St Lucie	FL

FL : Tampa	FL
GA	CB South
GA : Albany	GA
GA : Athens	GA
GA : Atlanta	GA
GA : Augusta	GA
GA : Macon	GA
GA : Savannah	GA
LA TX	CB South
LA	LA TX
LA : Alexandria	LA
LA : Baton Rouge	LA
LA : Lafayette	LA
LA : Monroe	LA
LA : Shrevesport	LA
TX	LA TX
TX : Arlington	TX
TX : Austin	TX
TX : Dallas	TX
TX : Houston	TX
TX : Killeen	TX
TX : San Antonio	TX
TX : Sulphur Springs	TX
MD	CB South
MD : Baltimore	MD
MD : Easton	MD
MD : ECS	MD
MD : FAS	MD
MD : Lanham	MD

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MD : LCS	MD
MD : Salisbury	MD
MD : STIT	MD
MO	CB South
MO : Central	MO
MO : Columbia	MO
MO : Southwest	MO
MO : Springfield	MO
MO : St Louis	MO
SC	CB South
SC : Columbia	SC
SC : Greenville	SC
SC : IDD	SC
SC : North Charleston	SC
SC : Pawley's Island	SC
SC : Rock Hill	SC
VA	CB South
Redwood	TMN
RW North	Redwood
IA	RW North
IL - IDD	RW North
IL - IDD : Marion	IL - IDD
IL - IDD : Matteson	IL - IDD
IL - IDD : O'Fallon	IL - IDD
IL - IDD : Peoria	IL - IDD
IL - IDD : Rockford	IL - IDD
MN	RW North
MN - Connie	MN
MN - Chrissy Tauber	MN - Connie

MN - David Wilson	MN - Connie
MN - Eileen Holm	MN - Connie
MN - Lori Larson	MN - Connie
MN - Paul Jaeger	MN - Connie
MN - Scott Rodwell	MN - Connie
MN - Development	MN
MN - Nita	MN
MN - Karina Schmitz	MN - Nita
MN - Lisa Thelen	MN - Nita
MN - Lori Wirtzfeld	MN - Nita
MN - Pat	MN
MN - Jean Feia	MN - Pat
MN - Mary Braun-Kapsner	MN - Pat
MN - Peg Dallman	MN - Pat
MN - Stephanie Kalbach	MN - Pat
ND	RW North
WI	RW North
RW South	Redwood
AZ	RW South
IN - IDD	RW South
OH - IDD	RW South
RW West	Redwood
CA	RW West
CA : 1	CA
CA : 1 : A	CA : 1
CA : 1 : A : B	CA : 1 : A
CA : 1 : Alta	CA : 1
CA : 1 : Eastern LA	CA : 1
CA : 1 : Inland	CA : 1

CA : 1 : Orange	CA : 1
CA : 1 : San Diego	CA : 1
CA : 1 : San Diego - Imperial	CA : 1
CA : 1 : San Diego - San Diego	CA : 1
CA : 1 : San Gabriel/Pomona	CA : 1
CA : 1 : Valley Mountain	CA : 1
CA : 2	CA
CA : 2 : A	CA : 2
CA : 2 : A : North Bay - Napa	CA : 2 : A
CA : 2 : A : North Bay - Santa Rosa	CA : 2 : A
CA : 2 : Golden Gate	CA : 2 : A
CA : 2 : Central Valley	CA : 2
CA : 2 : Far Northern	CA : 2
CA : 2 : Harbor	CA : 2
CA : 2 : Kern	CA : 2
CA : 2 : North Bay	CA : 2
CA : 2 : Redwood Coast	CA : 2
CA : 2 : Redwood Coast - Eureka	CA : 2
CA : 2 : Redwood Coast - Ukiah	CA : 2
OR	RW West