Access ACS Group Leader Guide

Group Leader Guide

As a group leader, you can manage your small groups and activities in Access ACS.

Accept and Decline Volunteers

You can accept or decline volunteer applicants. If you have enough volunteers, or if someone is not a good fit for a position, you can decline them via email.

To accept or decline an individual for an open position

1. On the **My Overview** page, under **My Opportunities**, click the opportunity.
2. Select the individual(s) you want to accept or reject.
3. Enter a message to send to the prospective volunteer(s) and click **Accept** or **Decline**.

Locate Individuals in your Groups

As a group leader, you can locate individuals who are in the groups you lead.

To locate individuals

1. Point to **Directories**, then click **Locate Individual**.
2. In the **Last Name** field, enter the individual's last name.
3. In the **First Name/Goes-By Name** field, enter the individual's first name.
4. Click **Run Search**.
5. To view the individual's information, click the name.

Mark Attendance in Small Groups

You can mark attendance, add guests, comments, praises, or prayer requests.

To mark attendance for small group leaders

1. In Access ACS, click **Groups** > **My Groups**.
2. Under **My Small Groups**, click on the name of the master group you want to view.
3. When the roster displays, select the individuals you want to mark attendance for.
4. Under **Roster**, in the **I want to...** drop-down list, select **Mark Attendance**, then click **Go**.
5. If necessary, change the date in the **Marking Date** field. To select the date from a calendar, click 🗓. The **Marking Date** defaults to the last scheduled meeting date.
6. To mark the selected individuals present, in the **Mark Selected List** drop-down list, select **Present**. To mark the selected individuals absent, select **Absent**.
7. If necessary, add guests, comments, prayers, or prayer requests.

- o Click the beside **Add guests, comments, prayers, or prayer requests**. Enter the names of the guests who attended the group and should be included in the total attendance count. These names are e-mailed to the small group's default contact and any other recipient you select or enter.
- o Enter any comments or notes about the meeting, along with any praise or prayer requests.
- o To send the e-mail to group members or the master level leader and group, select from the **Send e-mail to** drop-down list above the Guests text box.
- o To send the e-mail to individuals who are not currently affiliated with the group, enter the e-mail addresses in the **also send e-mail to** fiel d. Separate each e-mail address with a semi-colon. For example: *john.doe@home.com;mary.white@work.com*.
- o The e-mail sent out only displays the information selected for the individual it is sent to. If Mark is entered to receive information about Guests and Judy is entered to receive Comments, they will only see what was selected for them.
8. Click **Submit**.

View Information about Small Groups you Lead

As a small group leader, you can view information about the groups you lead.

For example, suppose your church features multiple sports that members can sign up for, and you oversee the sports ministry. Although you oversee the ministry, you have separate group leaders who coordinate the individual sports.

You can view the attendance rosters for each sport, and you can export these rosters, message the group members, print mailing labels or directories, or view attendance.

1. In Access ACS, click **Groups** > **My Groups**.
2. Under **My Small Groups**, click on the name of the master group you want to view.
3. When the roster displays, you can click **View by Date** to view the roster as of a selected date.

1. In Access ACS, click **Groups** > **My Groups**.
2. Under **My Small Groups**, click on the name of the master group you want to view.
3. When the roster displays, select the names of the group members' whose information you want to export.
4. Under **Roster**, in the **I want to...** drop-down list, select **Export to Excel**, then click **Go**.
5. Select the fields to include in your export, then click **Export**.

1. In Access ACS, click **Groups** > **My Groups**.
2. Under **My Small Groups**, click on the name of the master group you want to view.

3. Select the members you want to e-mail.
4. Under **Roster**, in the **I want to...** drop-down list, click **Send a Message**, then click **Go**.
5. To change the **Reply To** and **Subject** fields, click **Change**. These fields are automatically inserted.
6. Enter any additional e-mail addresses to send the message to.
7. Enter a subject for the message.
8. **Optional:** In the **Form Field** drop-down list, you can search for an insert information into the e-mail. The correct information displays in the delivered e-mail.

- **Small Group Leader's Name** — Inserts the small group leader's name in the generated e-mail.
- **Small Group's Name** — Inserts the small group name in the generated e-mail.
- **Requester's Name** — Inserts the name of the individual interested in the small group in the generated e-mail.
- **Requester's Phone Number** — Inserts the phone number of the individual interested in the small group in the generated e-mail.
- **Requester's E-mail Address** — Inserts the e-mail address of the individual interested in the small group in the generated e-mail.
- **Requester's Message** — Inserts the individual's message in the generated e-mail.
- **Requester's Availability** — Inserts the individual's availability in the generated e-mail.
- **Site Name** — Inserts the name of the site in the generated e-mail.
- **Complete Connection Link** — Inserts a link to the connection page so the small group leader can handle the connection.

9. **Optional:** Select to **Send this message to the parents of children**. For example, this is helpful if the participants of the small group are teens and the information in the e-mail is concerning payment for a retreat.
10. Compose your message, then click **Send Message**.

1. In Access ACS, click **Groups** > **My Groups**.
2. Under **My Small Groups**, click on the name of the master group you want to view.
3. Select the members you want to print labels for.
4. Under **Roster**, in the **I want to...** drop-down list, click **Print Mailing Labels**, then click **Go**.
5. Under **Label Type**, select **Individual Mailing Label** or **Family Mailing Label**.
6. Under **Label Selection**, select the label you want to print (2 per page or 3 per page).
7. Click **Preview**. Your labels display as a PDF file that you can print.

1. In Access ACS, click **Groups** > **My Groups**.
2. Under **My Small Groups**, click on the name of the master group you want to view.
3. Select the members you want to include in the directory
4. Under **Roster**, in the **I want to...** drop-down list, click **Print Directory**, then click **Go**.

5. Select the type of directory to print, then click **View Directory**.
6. To print the directory, click **Print**.

Work with Outreach and Group Leader Connections

In My Outreach Assignments, group leaders can can:

- View connections for the last 12 months, the 10 most recent connections, or all connections. You can also view connections by date range. Include completed assignments
- Sort the contact list
- View the contact details

On the **My Connections** tab, click a column heading to sort the assignment list, or click the contact name to view details about the contact.

1. Point to **Home**, then click **My Profile**.
2. Click the **My Connections** tab.
3. Under **My Assigned Outreach Connections**, select the time period.
    - **Last 12 Months** - Displays connections assigned in the last 12 months. The date range is today's date minus 12 months.
    - Connections assigned with a Contact Due Date beyond today's date do not display.
    - **10 Most Recent Connections** - Displays the 10 most recent connections. Connections with a Contact Due Date beyond today's date do not display.
    - **Show All** - Displays all assigned connections up to today's date. Connections with a Contact Due Date beyond today's date do not display.
    - **During Date Range** - Displays all assigned connections based on the set date range.
4. If necessary, select **Include Completed Connections** to view all assignments.

1. Point to **Home**, then click **My Profile**.
2. Click **My Connections**.
3. To complete an assignment, click a **Contact Name**.
4. Under **Enter Results**, enter the date you contacted the individual.
5. Select a response from the **Possible** responses column. Click a response to select it, then click to move the response to the **Actual** column.
6. If necessary, enter any additional comments.
7. Click **Save** to send the completed contact to the administrator as a change request, or **Cancel** to return to the previous page.

   Unless you select **Include Completed Connections**, only **Overdue**, **Incomplete** and **Pending Complete** contacts display.

If a contact is incomplete and the current date is after the Contact Due Date, it is **Overdue**. A contact is **Pending Complete** if it has been marked complete in Access ACS but has not been accepted by the Administrator.

1. Point to **Home**, then click **My Profile**.
2. Click **My Connections**.
3. Click a **Contact Name**.
4. Click **Connection History** to view all Connection Activity for this individual.

Enter Connection Results

When a connection is complete, you must enter the results of the connection.

This creates a change request, and before your changes display in Access ACS or ACS, an administrator must approve the change request. When the administrator approves the change request, the connection is complete.

To enter outreach connection results

1. On the My Connections page, click the contact name.
2. Under **Special Instructions**, enter the date you contacted the individual. If you prefer, click and select the date from the calendar.
3. In the **Possible** pane under **What were the responses to this connection**, select the possible feedback from the connection. Select a possible response, then click to move it to the **Actual** pane. To remove a response from the **Actual** pane, select it, then click to move it to the **Possible** pane.
4. If necessary, enter any additional notes about the visit in the **Add any additional comments here** text box.
5. Under **What are the results of the contact**, select an outcome for the connection from the options available:
   - **Close connection** - Select to save the results and close the connection.
   - **Keep Connection Open** - Select to save the results without closing the connection. This is helpful for logging attempted contacts.
   - **Reassign Connection** - Select to reassign the connection.
6. Click **Save**.

View Outreach Assignments

On the My Overview page, in the **My Leaders' Group Connections** section, a list of leaders with contact assignments for the last seven days displays.

To view a list of outreach contacts for a particular leader

1. On the My Overview page, in the **My Leader's Group Connections** section, click a leader's name. Contact assignments for the last seven days display.
2. Optional: To change the date range, select a new beginning and ending date. Click **Go**.
3. If necessary, to view all assignments including completed assignments, click **Include completed assignments**, then click **Go**.

To view individual information for a particular contact

1. On the My Overview page, in the **My Leader's Group Connections** section, click a leader's name.
2. Click the contact's name.

View Your Leaders' Assigned Connections

Small group leaders can view and complete the connections assigned to them. When leaders have assigned connections, the connections display in the My Leaders' Connections section on their My Overview page.

On the Leaders' Small Group Connections page, you can view assigned connection information for your small group leaders. It is organized into two sections.

- The **Assigned Connections** section displays a list of outstanding connections for a specific leader.
- The **Leaders' Connections** section displays a list of the leaders that the current leader supervises.

For example, Jeff is a small group leader. On this page, the Assigned Connections section displays a list of his outstanding assigned connections. The Leaders' Connections section displays a list of the leaders for whom Jeff is responsible and the number of outstanding connections for each leader. If no information is available, the sections do not display.

To view your leaders' assigned connections

1. On the Home Page, under **I want to View...**, click **Leaders' Connections**. A list of small group leaders displays.
2. To view a detailed list of a leader's outstanding assigned connections, click the leader's name. A list of outreach connections for that leader displays.
3. To view detailed information for an assigned connection, click the individual's name