



mentor**PRO** 

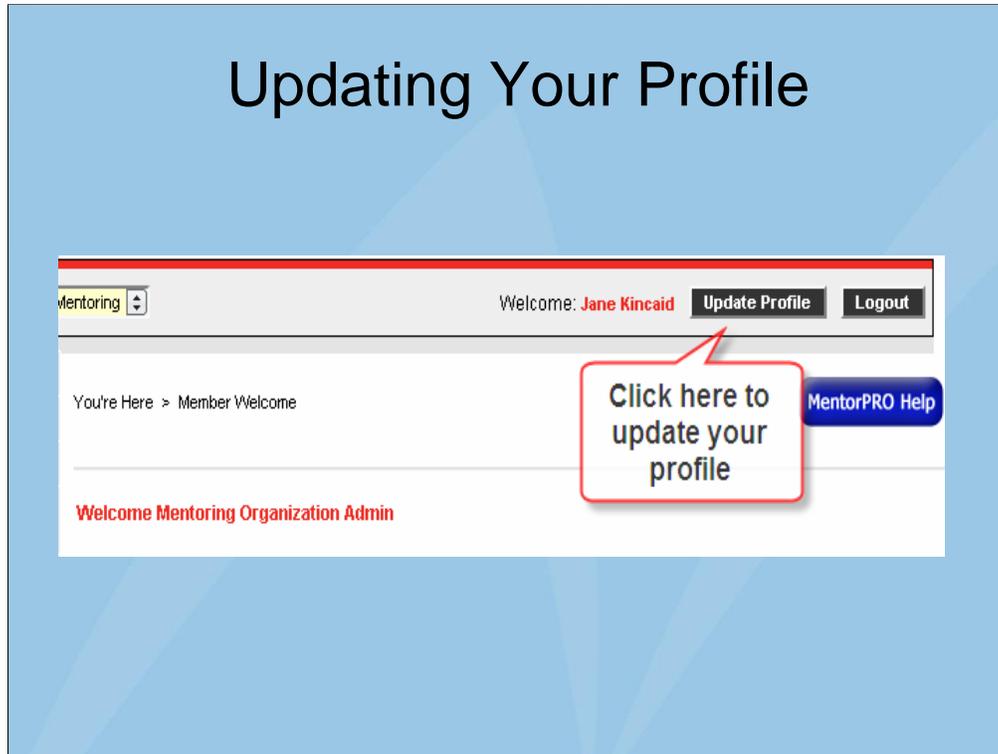
The Basics

Agenda

- Updating your profile
- Adding and updating users
- Managing mentees
- Managing mentors
- Managing matches
- Assigning matches
- Running reports
- The amazing help button!

For learning purposes, we will be using the MentorPRO staging site. The staging site contains dummy data. None of the information we will see is real; it has been created strictly for training and testing purposes.

Updating Your Profile



Once you have logged into your MentorPRO account, look for the “Update Profile” box, and click there.

Profile Information

Update User Profile

Fields marked by * are required

First / Middle / Last Name: Jane * [] Kincaid *

Login Email: jane.kincaid@mentoring.org

[Change Password](#)

Address: 1600 Duke St.
Suite 300

City: Alexandria

State: Virginia

Zip code: 22314

Home Phone: 555-930-5968 Example: 555-123-4567

Work Phone: Example: 555-123-4567

Cell Phone: Example: 555-123-4567

Make sure to hit Save!

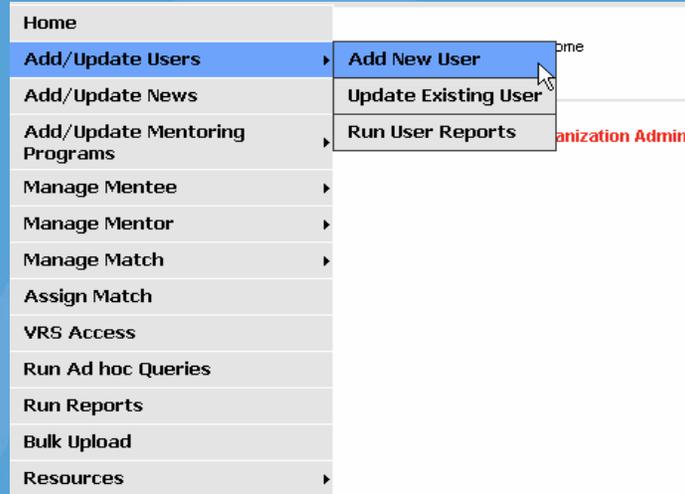
Cancel Save

In the Profile Information Tab, you can update all of your contact information, and you can change your password as well. Make sure to hit save when you are finished!

Who Sees This?

- Mentor Michigan can see the profile information of both the program administrator and program coordinator
- The program administrator can see the profile information for other program coordinators
- Program coordinators can see only their own information

Adding/Updating Users



To add or update a new user, you must first be logged in as an administrator. Mentor Michigan can also do this, so feel free to ask us for assistance.

Navigate to Add/Update Users → Add New User or Update Existing User.

You can also run User Reports from this part of the menu.

User Information Fields marked by * are required

Organization Type:

Organization Name: *

User Type: *

First/Middle/Last Name: * * *

Title:

Login (email address): *

Password: * (Minimum of 8 characters and Maximum of 10 characters)

Check if the address is same as Organization address

Address:

City: State: Zip code:

Home Phone: Example: 555-123-4567

Work Phone: Example: 555-123-4567

Cell Phone: Example: 555-123-4567

Advocacy Network Member:

Make sure to hit save!!

In the “User Information” tab, you may enter contact information for the new user, including a user name (e-mail address) and password. The new user can update his or her password and/or contact information upon logging into MentorPRO.

Make sure to hit save!

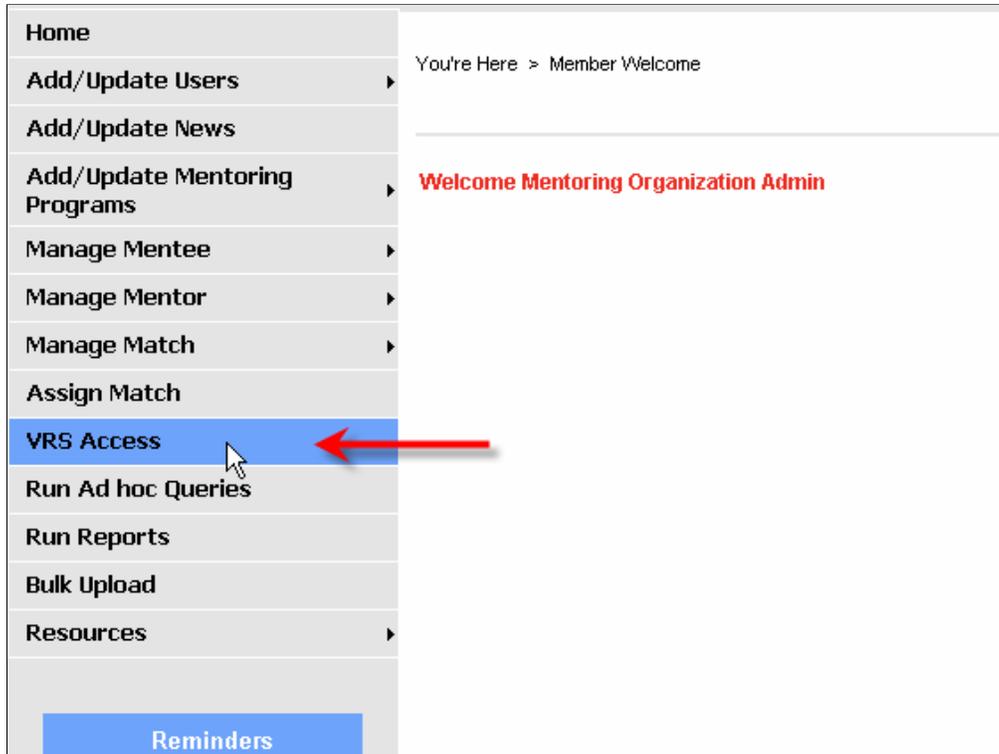


Adding a New Program

- To add a new program to MentorPRO, you must first register that program in the National Mentoring Database (NMD)
- Must be logged in as the primary administrator

In order to add or update a new mentoring program, you must be logged in as the primary administrator. Mentor Michigan can also make these changes, so please don't hesitate to ask for assistance!

The NMD is linked to the Mentor Michigan Directory. Any updates that you make at either website will be made in the other, and volunteers who search either website will see your program's information.



If you are logged in as the primary administrator, you will see the “VRS Access” entry in the menu – note that this entry will only appear if you are logged in as the primary administrator. When you click “VRS Access,” you will be brought to your profile page in the NMD.

Program Administrator

Home You're Here > Member Welcome

Add Another Program

Add/Update User **Welcome Jane Kincaid**

My Profile From this page, you may review and edit your program information in below, and you will be guided through the editing process.

Volunteers By clicking on the buttons to the left, you may perform a number of o database, review and edit your administrator profile, and view informat also click for [help](#), view [frequently asked questions](#) (FAQs), or [contac](#)

FAQs

Help

Contact Us

MentorPRO Access

Logout

Reminders

Program Name ?	Program Contact ?	Date Last Updated
Alexandria Teen Mentoring	Jane Kincaid	08/04/2009
Alexandria Cool Tweens	Jane Kincaid	04/09/2009
Alfred Middle School	Jane Kincaid	04/22/2009
Scott Elementary	Jane Kincaid	12/11/2008
Summer Days Mentoring	Madison Smith	03/12/2009

After clicking VRS Access, you will see a page that looks like this. Click “Add Another Program.”

→ Step 1
→ Step 2
→ Step 3

Program Information
Program Administrator
Mentor/Mentee Information

Program Information

→ Fields marked by * are required

* Mentoring Program Name:

Parent Organization:

External ID Number: ?

EIN: ?

* Program Product Code: ?

* Program Address 1:

Program Address 2:

* Program City:

* Program State:

* Program Zip Code:

* Program Volunteer Phone: Example: 555-123-4567

Program Web site:

Cancel
Save & Continue
Save & Logout

Notice that there are three steps. Simply complete the information requested on Step 1, hit “Save & Continue,” and repeat the process for steps 2 and 3.

Program Name ?	Program Contact ?	Date Last Updated ?	Total Volunteers ?	New Volunteers ?
Alexandria Teen Mentoring	Jane Kincaid	08/04/2009	0	0
Alexandria Cool Tweens	Jane Kincaid	04/09/2009	0	0
Alfred Middle School	Jane Kincaid	04/22/2009	0	0
Scott Elementary	Jane Kincaid	12/11/2008	0	0
Summer Days Mentoring	Madison Smith	03/12/2009	0	0
Alfred Middle Schools	Jane Kincaid	12/15/2008	0	0
Teen Girls Go!	Jane Kincaid	01/13/2009	0	0
Turtle Hook elementary	Jane Kincaid	02/19/2009	0	0
One to One Mentoring	Jane Kincaid	02/24/2009	0	0
Making A Big Difference	Jane Kincaid	08/03/2009	0	0

↓

Program Administrator

Welcome: **Jane Kincaid** [Logout](#)

You're Here > Add/Update Program Administrator > Program Information

<ul style="list-style-type: none"> Home Add Another Program Add/Update User My Profile Volunteers FAQs 	<p>Program Name: Alexandria Teen Mentoring Parent Organization: Alexandria Community Mentoring Center</p> <p>Program revision date: 08/04/2009 Program updated by: jane.kincaid@mentoring.org</p> <p>Program Record Number: 12917 Program Administrator: Jane Kincaid</p> <p style="text-align: center;"> 12917 </p> <p style="text-align: center;"> Step 1 Step 2 Step 3 </p> <p style="text-align: center;"> Program Information Program Administrator Mentor/Mentee Information </p>
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After you have completed entering program information, click “Home” in the menu and then click on the program name of the program you just entered (pictured above).

Take a note of the “Program Record Number” (pictured below), as we will need to enter that number into MentorPRO – which is our next step.

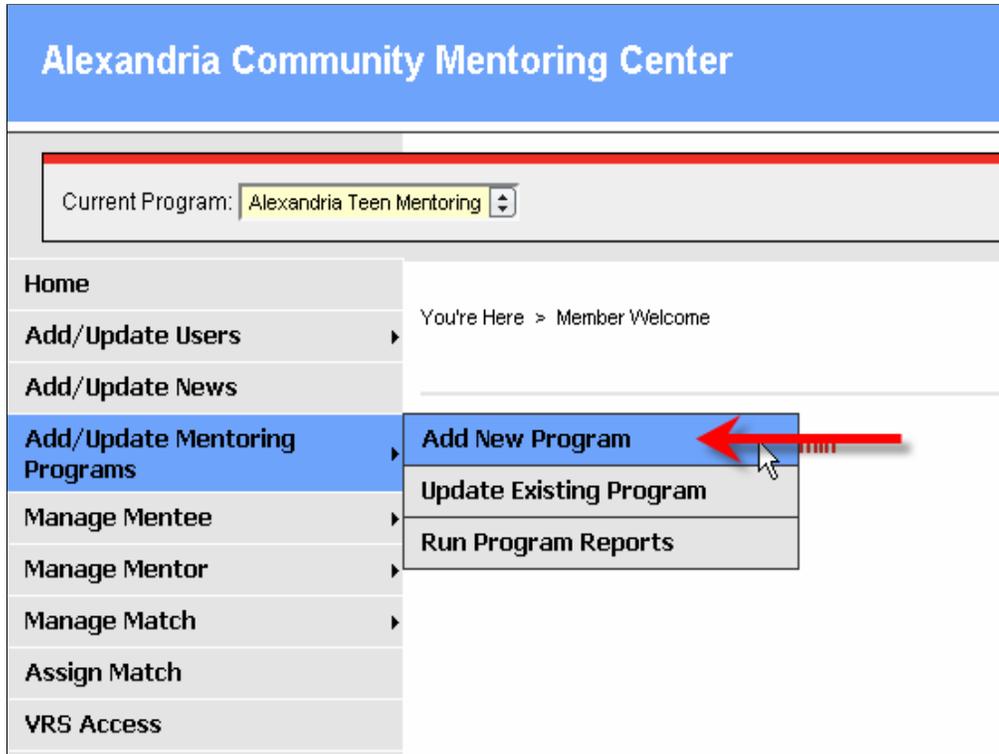
After you have made that note, click “MentorPRO Access” on the menu.

Alexandria Community Mentoring Center

Current Program: Alexandria Teen Mentoring

- Home
- Add/Update Users
- Add/Update News
- Add/Update Mentoring Programs**
 - Add New Program**
 - Update Existing Program
 - Run Program Reports
- Manage Mentee
- Manage Mentor
- Manage Match
- Assign Match
- VRS Access

You're Here > Member Welcome



In MentorPRO, navigate to “Add/Update Mentoring Programs → Add New Program.”

Add Program

Mentoring Program Information | Mentoring Program Structure | Matching Criteria | Contact Requirements | Comments | Surveys

Mentoring Program Information

Fields marked by * are required

Organization Name: Alexandria Community Mentoring Center *

Mentoring Program Name: *

Mentoring Program Record Number: *

Note: The program record number can be obtained by logging into your NMD account.

Import Program Data

Mentoring Program Type: -Select One- *

Check here if the Mentoring Program address is the same as the Organization address.

Address1: Address2:

City: State: -Select One- * Zip Code: *

Enter the Program Record number here then Import

The first step is to import the program data we just entered in VRS. Enter the Program Record Number and click Import.

Then, scroll down the page and enter any missing data.

Be sure to hit save when you are finished! Complete these steps for each of the various tabs (Mentoring Program Structure, Matching Criteria, etc.).



Importance of Program Section



- Define your screening process
- Define your matching criteria
- Define your contact requirements for your program coordinators

- Define your screening process
 - What types of background checks do you perform? How many references are required? Do you have an in-person interview?
- Define your matching criteria
 - By interests, goals, geographic distance (optional)
- Define your contact requirements for your program coordinators



Managing Mentees



- From the Manage Mentee menu, you can:
 - Add a new mentee
 - Update a mentee
 - View Screening Process of mentees
 - Update mentee-only activities
 - Run mentee reports

Home	
Add/Update Users	You're Here > Member Welcom
Add/Update News	
Add/Update Mentoring Programs	Welcome Mentoring Organ
Manage Mentee	Add Mentee
Manage Mentor	Update Mentee
Manage Match	Screening Process
Assign Match	Mentee Activities
VRS Access	Run Mentee Reports
Run Ad hoc Queries	
Run Reports	
Bulk Upload	
Resources	



Add Mentee

Application Started:
 Month | Day | Year * Pay close attention here!

Programs:

Contact Info | Profile | Family | Goals | Interests | Education
 Referral | Prior Mentoring | Job | Comments | Attachments | Screening

Contact Information Fields marked by * are required

First/Middle/Last Name: | | *
 Email: |
 Address: | *
 |
 City: | * State: -Select One- | * Zip code: | *

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Reset **Save And Continue**

Filling in data about your mentees will be similar to other work you have done in MentorPRO. Simply fill out the boxes, scroll down to the bottom of the page, and hit save. Then complete the process for the remaining tabs.

IMPORTANT: Take special care when selected the “Application Start Date.” This date cannot be changed once it has been entered – so double-check this date for accuracy!



Managing Mentors



- From the Manage Mentor menu, you can:
 - Add mentor
 - Update mentor
 - View Screening Process of mentor
 - Update mentor only activities
 - Run mentor reports

Home	
Add/Update Users	You're Here > Member Welco
Add/Update News	
Add/Update Mentoring Programs	Welcome Mentoring Org
Manage Mentee	
Manage Mentor	Add Mentor
Manage Match	Update Mentor
Assign Match	Screening Process
VRS Access	Mentor Activities
Run Ad hoc Queries	Run Mentor Reports
Run Reports	
Bulk Upload	
Resources	

Managing Mentors

Managing your mentors is nearly identical to managing your mentees, with one important exception – the Screening Tab



Not Started
 Pending
 Approved/Completed
 Concerned

Mentor Screening Status: Screening In Process
 Change Screening Status: Approved

Change Status

Status	Process	Re: []	Date Last Updated
<input checked="" type="radio"/>	Application	Application Result: []	04/2009
<input type="radio"/>	Interview	N/A	N/A
References			
<input type="radio"/>	Reference 1	N/A	N/A
<input type="radio"/>	Reference 2	N/A	N/A
<input type="radio"/>	Reference 3	N/A	N/A
Background Check			
<input type="radio"/>	Fingerprint-based Criminal Check	N/A	N/A
<input type="radio"/>	Name-based Criminal Check	N/A	N/A
Other Registries			
<input type="radio"/>	Child Abuse Registry	N/A	N/A
<input type="radio"/>	Sexual Offender Registry	N/A	N/A
Orientation and Training			
<input type="radio"/>	Orientation	N/A	N/A

Select "Approved" then click "Change Status"

The screening tab allows you to track your mentors screening process from Application through Training.

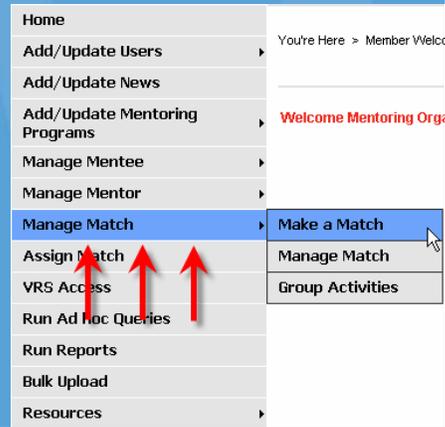
However, the most important area of this page is the "Mentor Screening Status." Mentors will not appear to be matched with youth until this box is changed to "Approved," and "Change Status" is clicked. This should only be done once all background checks are completed.



Managing Matches



- From the Manage Match menu, you can:
 - Make a match
 - Manage a match
 - Run match reports



Add Match

Make A Match For: *

Enter Name:

Search

Fields marked by * are required

Enter a name or leave blank to list all mentors

Select Matching Mentors

Select	Name	Email	City	State	Phone	Profile	Preferences
<input type="checkbox"/>	Jenna Amberson	jenna.amberson@test.com	Alexandria	VA	555-408-6114	View	View
<input type="checkbox"/>	Lynda Cook	lynda.cook234@test.com	Alexandria	VA	555-203-4059	View	View
<input type="checkbox"/>	Matthew Cuthbert	mattcuth@teenmentoring.org	Alexandria	VA	514-485-4789	View	View
<input type="checkbox"/>	Valerie Frizzle		Alexandria	VA		View	View
<input type="checkbox"/>	Stewart Frye	stewart.frye@test.com	Alexandria	VA	555-203-4059	View	View
<input type="checkbox"/>	Josh Howard	josh.howard@test.com	Alexandria	VA	555-555-5555	View	View
<input type="checkbox"/>	smith john	cclappas@optonline.net	stamford	VA	203-555-1212	View	View
<input type="checkbox"/>	David Luz	a.yetke@aol.com	Bristol	CT	860-555-5555	View	View

Find Matching Mentees

To make a match, enter the name of the mentor (or leave that field blank, which will generate a list of all your mentors) and click “Search.”

Next, select the mentor from the list of mentors and click “Find Matching Mentees.”

Make Match

Program Type: **One-to-One** Program Name: **Alexandria Teen Mentoring**

Match Results

Mentor Details



IMAGE
NOT AVAILABLE

Name: Matthew Cuthbert
 Email: mattcuth@teenmentoring.org
 City: Alexandria
 Zip code: 22314
 State: Virginia
 Phone: 514-465-4789
[Preferences](#)
[View Previous Match History](#)

Matching Mentees

Select	Name	Age	Previous Match History	Race	Interests	Distance	Profile	Parent/Guardian Preferences
<input type="checkbox"/>	Bradd Gerry Dean	14	View	African American		7 miles	View	View
<input type="checkbox"/>	John Jacob-Smith	11	View	Asian/Pacific Islander		11 miles	View	View
<input type="checkbox"/>	Omar Sharif	21	View			0 miles	View	View

Select Match Date:
 Month
Day
Year *


Make A Match

Take care! This date cannot be changed once entered!

After clicking “Find Matching Mentees,” a list of potential mentees will be generated. Select the mentee from the list by checking the box. Then, pay special attention to the “Select Match Date” boxes, because this date cannot be changed once you enter it. Finally, click “Make A Match.”



Managing Matches

- Match Supervision
- Match Activities
- Match Closure
- Attachments



- Match Supervision

- Match Supervision tracks ongoing supervision of matches – everyday case work. This tab is especially valuable because a report can be generated from this tab

Match Activities

Match Closure

Attachments

Manage Match

Match Start Date: **08/04/2009** Program Type: **One-to-One**
 Match Condition: **Yellow** ● Program Name: **Alexandria Teen Mentoring**
 Mentor Name(s): **Jenna Amberson** Mentee Name(s): **Sarah Fish**

[Match Overview](#) [Match Supervision](#) [Match Activities/Meetings](#) [Case Notes](#) [Match Closure](#) [Attachments](#)

Status

Mentor Details


 Name: Jenna Amberson
 Email: jenna.amberson@test.com
 City: Alexandria
 State: Virginia
 Zip code: 22314
 Home Phone: 555-408-6114
Date Matched: 08/04/2009

Mentee Details


 Name: Sarah Fish
 Parent/Guardian: Jenna Fish
 Email:
 City: Alexandria
 State: Virginia
 Zip code: 22314
 Home Phone:
Date Matched: 08/04/2009

The Match Overview tab gives a brief synopsis of the selected match, where pictures of your mentors and mentees will be displayed if you choose to upload them.

The Match Supervision tab allows users to enter Match Supervision details (such as case notes)

Match Activities/Meetings allows users to track when, where, and how often your matches are meeting.

Case Notes is simply a comments tab; Match Supervision tab is preferred, because it is more robust and a report can be generated on the Match Supervision tab.

Match Close allows tracking of when matches do close.

Attachments work similarly to e-mail attachments. Simply upload a file, and it will be permanently attached to the match's records.



Running Reports

- Mentee Reports
- Mentor Reports
- Match Reports
- Program Reports
- Ad Hoc Queries



MentorPRO reports are among its most valuable features. MentorPRO can collect data that has been entered about mentees, mentors, matches, and even program-wide data, and that data is organized into intelligible reports. Reports can be viewed online, and they can also be exported into Excel – where they can be customized to fit your needs.

Here are some examples of reports that can be run:

- Mentee/Mentor Contact Information
- Mentor and Mentee Wait List
- Time lapse between application to match
- Current Match Status
- Match Supervision
- Match Closure
- Program Statistics



Bulk Upload

- Allows programs to copy and paste from an existing database and upload multiple records into MentorPRO at once



Allows programs to copy and paste from an existing database and upload multiple records into MentorPRO at once

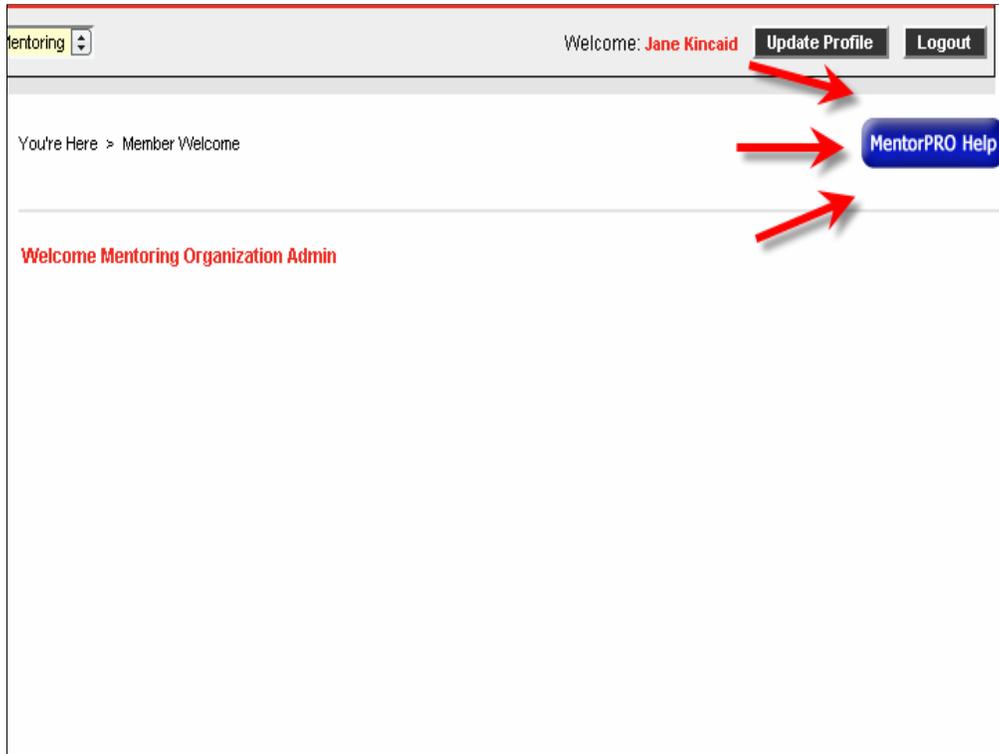
If you think that utilizing this feature would be beneficial to you, please contact us. This feature can be of great benefit, but it can be a bit tricky. We are happy to offer assistance.



The Help Button



- Appears on every page in MentorPRO
- Links to a comprehensive User Manual
- Will generate results based on which page of MentorPRO you are viewing



The help button is always your “first line of defense,” and it will help you find solutions to most problems.



MentorPRO Resources



- Flash Video Tutorials
 - <http://www.youtube.com/mcsconline>
- PDF Tutorials
 - www.mentormichigan.org
 - MentorPRO page on the Program Resources Tab



MentorPRO in Your Program



- General Program Requirements
 - Be registered in the Mentor Michigan Directory
 - Have completed the Mentor Michigan census
 - Demonstrate strong programmatic capacity
 - Work toward achieving *Quality Program Standards for Youth Mentoring*
- To learn more, contact Amber Troupe
 - troupea@michigan.gov
 - 517-241-3493



If you are interested in learning more about how MentorPRO could benefit your program, please contact ...