

Steps for Updating the Team Listing Online

Table of Contents

Getting Started.....	1
Logging in to the Team Profile Page	2
STEP 1: Update Team Listing.....	4
STEP 2: Update Team Roster	5
Update/Remove Existing Team Members	5
Add New Team Members	6
STEP 3: Confirm Team Meets Standards.....	8

Getting Started

1. Are you currently listed as a team coordinator or team leader on the team? You would have been emailed your login details for updating your team listing.
 - a. YES
 - i. Proceed to step 2.
 - b. NO
 - i. You do not have permissions setup in the system to update the team listing online. Ask someone who is listed as the team leader or team coordinator to perform this task and follow these directions. If you are a new team leader or team coordinator, [contact the National Office](#) about getting permissions.

Logging in to the Team Profile Page

2. Go to <http://mx.acpa-cpf.org/MYACPA/MyTeams.aspx> and login with your ACPA credentials.
 - a. If you are not sure or you forgot your login, go to: <http://mx.acpa-cpf.org/SignInHelp.aspx>
3. Do you see a screen similar to the one below?
 - a. Yes
 - i. Click the "More" hyperlink next to your team.
 - ii. If your role is not labeled as a "team leader" or "team coordinator" on the page below, you do not have permissions setup to update the team listing online. Otherwise, proceed to next step.
 - b. No
 - i. If not go to: <http://mx.acpa-cpf.org/MYACPA/MyTeams.aspx>
 - ii. Click the "More" hyperlink next to your team.
 - iii. If your role is not labeled as a "team leader" or "team coordinator" on the page below, you do not have permissions setup to update the team listing online. Otherwise, proceed to next step.

The screenshot shows the 'My Teams' page of the American Cleft Palate - Craniofacial Association website. The page header includes the organization's name and logo, a navigation menu with links for 'MY ACPA', 'WHO ARE WE', 'TEAM CARE', 'EDUCATION', and 'RESEARCH', and a search bar. The user is logged in as 'Ms Hillary Jones' and is a 'Non-Member'. The main content area is titled 'My Teams (Current and Past)' and features a table with the following data:

ADD MYSELF TO A TEAM				
		My Teams	My Role	My Status
More	Update My Status	Team ACPA	Team Leader	Current (Active)

Below the table, there are two instructions:

If you are part of a team that is listed above, click "More" next to the team above and click on the name of the team below to view additional information about that team.

If you are a member of a listed team that does not appear above, click "Add myself to a team" above. The team must be listed in order for you to add yourself to a team.

4. After clicking the "more" hyperlink, you should see the screen below. Click the team name hyperlink (as seen below):

American Cleft Palate - Craniofacial Association
...committed to team care

Non-Member
Logged in as: Ms Hillary Jones
LOGOUT

MY ACPA WHO ARE WE TEAM CARE EDUCATION RESEARCH Search... >>

MY ACPA > My Teams

Manage Profile
Membership
Member Directory
Team Directory
My Teams
Committee Directory
Meetings
My Registrations
Donate
Newsletter
My Shopping Cart
Journal
Past ACPA Annual Meetings

My Teams (Current and Past)

ADD MYSELF TO A TEAM

	My Teams	My Role	My Status
More	Update My Status	Team ACPA	Team Leader
			Current (Active)

If you are part of a team that is listed above, click "More" next to the team above and click on the name of the team below to view additional information about that team.
If you are a member of a listed team that does not appear above, click "Add myself to a team" above. The team must be listed in order for you to add yourself to a team.

Additional Team Member Detail

Team	Team ACPA	Team Category	CPT, CFT
Team Member	Jones, Hilary	Team Phone	919.933.9044
Team Role	Team Leader	Team City	Chapel Hill
Team Member Status	Current (Active)	Team State	NC
Started Participation	01/21/2015	Team Country	
Ended Participation		Listed Team	No
		Age Range	

5. You will be taken to your team's profile page (as seen below):

American Cleft Palate - Craniofacial Association
...committed to team care

Non-Member
Logged in as: Ms Hillary Jones
LOGOUT

MY ACPA WHO ARE WE TEAM CARE EDUCATION RESEARCH Search... >>

Manage Profile
Membership
Member Directory
Team Directory
My Teams
Committee Directory
Meetings
My Registrations
Donate
Newsletter
My Shopping Cart
Journal
Past ACPA Annual Meetings

Team ACPA

Address
1504 E Franklin St
Ste 102
Chapel Hill NC 27514

Category: CPT, CFT
Age Range:
Phone: 919.933.9044
Fax: 919.933.9604
Email: cat@acpa-cpf.org
Website: <http://www.w.acpa-cpf.org>

Map locations may be approximate

Map data ©2015 Google

	My Team
Update Team Profile	Team ACPA

STEP 1: Update Team Listing

6. Make sure you are logged in to the team profile page ([see directions above for details](#)).
7. Verify the listing information at the top of the page is correct (address, age range, phone, fax, email and website). If any information needs to be updated, click the “Update Team Listing” hyperlink (as seen below).

Team ACPA

Address
1504 E Franklin St Ste 102
Chapel Hill NC 27514-2820 US

Category: CPT, CFT
Age Range:
Phone: 919.933.9044
Fax: 919.933.9604
Email: cat@acpa-cpf.org
Website: <http://www.acpa-cpf.org>

Map locations may be approximate

KENTUCKY VIRGINIA
Nashville
TENNESSEE NORTH CAROLINA
Atlanta Charlotte
SOUTH CAROLINA
Map data ©2016 Google

My Team
Update Team Listing Team ACPA

8. Update the fields in the popup window (as seen below). When finished, use the scroll bar within the popup window to scroll down.

Edit

Team Information

Team Name and Contact Details

Team ID# * Main Phone *

Team Name Other Phone

Team Email Fax

Website

Team Address

Company (if part of team address)

City

Street 1 State

Street 2

Postal Code

9. Click the gray “Save” button to save the changes. Proceed to updating the team roster below.

Save

STEP 2: Update Team Roster

10. Make sure you are logged in to the team profile page ([see directions above for details](#)).
11. Scroll down the page until you see the team roster (as seen below).

ADD NEW TEAM MEMBER						
	Team Member	Team Role	Missing Address?	Missing Email?	Missing Specialty?	ACPA Member?
Update	Jones, Hillary	Team Coordinator	No	No	Yes	Non-Member
Update	Toyama, Wendy-Jo	Team Leader	No	No	No	ACPA Member
Update	Kirkman, Alyssa	Team Member	No	No	Yes	Student Non-Member
Update	Kokos, Jessica	Team Member	No	No	Yes	Non-Member

Update/Remove Existing Team Members

12. Look at the names on the roster list. Make sure the information is accurate. Things to look out for:

- a. Is the team role accurate? (can only be team leader, coordinator or member)
- b. Does Missing Address, Missing Email or Missing Specialty = no?
- c. Is the individual still a member of the team?

13. If you answered “no” to any of the above questions, follow the directions below. Otherwise, proceed to the next step.

d. Update Team Role

- i. Click the “Update” hyperlink next to the individual’s name whose role needs to be updated.
- ii. In the popup window, click the dropdown field and select the appropriate role.
- iii. Click the gray Save button when finished.

e. Add/Update an Address, Email, or Specialty

- i. Click the “Update” hyperlink next to the individual’s name.
- ii. Click the “Add or Update Team Member” tab at the top of the popup window.
- iii. Input the missing information in the appropriate field(s) (keep in mind, the fields default to blank even when information is not missing).
- iv. When finished, scroll to the bottom of the popup window and click the gray Save button.

f. Remove Individual from Team Roster

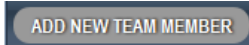
- i. Click the “Update” hyperlink next to the individual’s name who is no longer on the team.
- ii. In the popup window (as seen on the right) make changes to the following fields:
 1. Team Member Status: click “Past (inactive)”
 2. End Date: (click calendar icon to enter approximate end date).
- iii. When finished, click the gray Save button.

The screenshot shows a popup window titled "Add or Update Team Member". It has two tabs: "Team Member Information" and "Add or Update Team Member". The "Add or Update Team Member" tab is selected. The form contains the following fields:

- Name: Jones, Hillary
- Role: Team Coordinator
- Team Member Status: Current (Active), Past (Inactive) (highlighted with a red box)
- Participation Dates: Start Date: 7/1/2015, End Date: (empty, with a calendar icon highlighted by a red box)
- Buttons: Save (highlighted with a red box), Cancel

Add New Team Members

14. Is a team member missing from the roster? If so, follow the directions below. If not, proceed to next section.
15. From the [team profile page](#), click the “Add New Team Member” button above the roster:



16. Search for Individual in Database

In the popup window, click the lookup icon (as seen below) to see if the individual is already in the database.

A screenshot of a web form titled "Add or Update Team Member". The form has several sections: "Name and Role" with a "Name" text box and a "Role" dropdown menu; "Manage Team Member Status" with radio buttons for "Current (Active)" and "Past (Inactive)"; and "Participation Dates" with "Start Date" and "End Date" text boxes. A red box highlights a magnifying glass icon next to the "Name" text box. At the bottom are "Save" and "Cancel" buttons.

17. In the lookup window, click inside the box to the right of the “Find” button.



18. Enter the person’s last name or email and press enter. You can also search LASTNAME, FIRSTNAME if too many results appear. For example, you can search “Smith, Sally” or “Smith, S”
Note: Searching by FIRSTNAME LASTNAME or “Sally Smith” will not yield results.
19. Did the person appear in the results list? Look at city, state and specialty to ensure accuracy.
 - a. YES
 - i. If the city, state and specialty are correct, click the row of the name and click the gray Select button. If the city, state and specialty are not correct, see if another record in the list is correct (if not, follow steps for adding new record below).
 - ii. Fill out the Role, Team Member Status and Start Date for the individual (as seen below). Press the gray Save button when finished.

A screenshot of the "Add or Update Team Member" form with the following fields filled: "Name" is "Toyama, Wendy-Jo", "Role" is "Team Member", "Team Member Status" is "Current (Active)", and "Start Date" is filled with a date. A red box highlights the "Save" button at the bottom left. The magnifying glass icon next to the "Name" field is also highlighted with a red box.

- iii. The individual should now appear in the roster list.

b. NO

Add New Record

- i. Press the gray “Cancel” button on the results page.
- ii. Click the “Add or Update Team Member” tab at the top of the popup window.
- iii. Enter the information about the individual in the fields provided (as seen below).

- iv. Before clicking the save button, click the “Team Member Information” tab at the top of the page and fill out the Role, Team Member Status and Start Date for the individual (as seen below). Press the gray Save button when finished.

- v. You should be back at the team profile page. Refresh the page to update the roster list. Proceed to confirming the team standards below.

STEP 3: Confirm Team Meets Standards

20. Make sure you are logged in to the team profile page ([see directions above for details](#)).
21. Scroll to the bottom of the page until you see the Standards section as seen below.
22. Complete the fields within the Standards section.
23. Thank you for updating your team listing! If you did not complete steps 1-2, please do so. Also, please let the other team coordinators and leaders on the team know that you updated the team listing.

Standards

Please answer the following: *

Team ID Number

Individual's Name

Email Address

City

State/Province

Country

Is the team listing (address, age range, phone, fax, email and website) above correct and up-to-date?

Yes

Is the team roster above correct and up-to-date (including no missing addresses, emails or specialties)?

Yes

By clicking submit, I affirm that I have read and confirm the accuracy of all of the information contained within this team's record (including listing information and roster information), that our team abides by all of the information provided herein, and that all patients receiving care from this team are managed either by an appropriate team member, so identified in the team roster, or with full knowledge of the person evaluating or treating patients if referred to a professional person not specifically identified by name and profession within the roster.

Submit