Lesson 5: Managing a roster

1. Find your trip that you wish to review
   a. Hover over your name and select “My Activities”

2. Review upcoming trips
   a. Here you will see both upcoming and completed trips that you led and participated in. The red arrow shows upcoming and the green shows your past trip history
3. I will be managing my upcoming Bierstadt Backpack trip
4. Once you click into your trip you can manage all trip activity.
   a. Scroll midway down the page to view your “Manage Activity” functions on the right hand side.
   b. **Pro tip**: Only the leader of each trip can view this panel on the trip page.
   c. Here we will be covering the Manage Roster and Email Participants buttons.
5. Both buttons, Manage Roster and Email Participants, will bring you into the Roster as you see below:

6. + Add Person to Roster
   a. If you have anyone you wish to add to your roster manually, here is where you can do so.

   b. This can be members, leaders and/or guests. Both will have accounts with the CMC.

   c. You might enter a name and notice while testing that they have multiple results. If you know the individual’s username this will help to pinpoint which account is active.

   d. Waiver alert
      i. Please note, that if you try to register a participant (member or guest) that has not yet signed the CMC waiver, you will receive the following alert:
e. Admin
   i. If you are registering a co-leader that you wish to have editing access, you can grant them so by clicking the following box when adding them to the roster.

f. Activity role
   i. You can also specify the role of this registered individual

   ![Activity Role]

   - Participant
     - Primary Leader
     - Co-Leader
     - Assistant Leader
     - Mentored Leader
     - Instructor
     - Participant
     - Chaperone

   ![Activity Role]

   ![Activity Role]

   g. Activity Registration Status
      i. When adding a participant, this will auto-populate to “Registered” status.
      ii. However, you can update the individual’s status at any point as needed.
h. Registration Date can be updated as needed, though it will automatically enter the current date/time

Registration Date

31 / May / 2022 03 : 46 : 51 PM

i. Requested Info (optional)
   i. Any additional questions regarding the trip that the participant asked can be answered here. Participants will be notified once they are added to the roster

Requested Info
Additional info requested from the participant.

j. Registration Notes (optional)

Registration Notes
Optional. Enter any pertinent info about this person’s registration such as "Fee Waived by Martin Mountaineer" or "missed first field trip." Participants can NOT see or access these notes.

k. Participant Result
   i. This will be managed later when you Close your trip. Learn how to do so here. (hyperlink coming soon)
   ii. No need to do anything to this field when adding a person to the roster.
I. Participation Notes (optional)

Participation Notes
Enter pertinent notes about the participant’s performance. This could be for an individual who performed exceptionally or a student who needs improvement in a particular skill. These notes will be visible to activity leaders and must be objective. Please do not include subjective opinions or refer to temporary health issues that are not relevant to future trip leaders. These notes are intended to identify future activity leaders and to help match participants with trips that are appropriate for their abilities.

m. Volunteer Hours (optional)
   i. This is to be done after the completion of the activity
   ii. No need to do anything to this field when adding a person to the roster.

Volunteer Hours
Enter the number of hours this person spent volunteering for this activity. Include time spent doing administrative tasks before and after the activity as well as the time spent doing the activity.

n. Show as Contact
   i. If the participant you are adding is a co-leader or instructor and you wish to include their contact information on the activity details page, check off this box.

   □ Show as contact
   Check this box if this person should be shown as a contact on the activity details page.

o. Badges to assign
   i. Badges are not loaded into the testing site. For those who do not know yet what “badges” are, a future training (not yet on the calendar) on badges will be made available.
   ii. Badges can be rewarded to participants from leaders and instructors, thus if a participant successfully completes the trip/course/school, they will be rewarded a badge. Ex: Scrambling badge

   Badges to Assign
   These badges will be granted to this user when the activity is closed.

p. Carpooling
   i. Enter the participants carpool preferences, any applicable notes, and any friend they wish to be paired with
q. Click Save

7. **Edit or Cancel a participant**
   
a. Once on your roster, click “Edit or Cancel” next to the participant name

   ![Participant List]
   
   b. Select Activity Registration Status and select “Canceled”

   ![Participant Information]
   
   c. Make any edits you need to. This form matches the form to add a participant as detailed above.

   d. Click Save and return to roster window
e. Now you will see a separate list with your canceled participants
   i. Pro tip: You can click “Edit or Cancel” again at any time to update the Activity Registration Status for canceled participants if they become available to rejoin the trip

   CANCELED (1)

<table>
<thead>
<tr>
<th>NAME</th>
<th>PROFILE PRIVATE GROUPS</th>
<th>ACTIVITY ROLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roberta Farrington</td>
<td>Edit or Cancel</td>
<td>Participant</td>
</tr>
<tr>
<td></td>
<td>Review</td>
<td></td>
</tr>
</tbody>
</table>

8. Review Participants
   a. Leaders have the ability to screen their participants and review a participants profile by clicking on the name of the participant (as shown above). This will show leaders their participants' past experience including badges they have earned and any other information that the participant wishes to highlight on their profile.

   Roberta Farrington
   PROFIE

   Roberta Farrington
   Member since: Sep 13, 2021
   Branch: Unaffiliated

   testing@cmc.org

   COMMITEES
   - Denver

   b. Once we move to the “Production” site, we will review badges and ways to screen trip participants
   c. As you see above, the testing site will not show these details at this point
   d. See example below of a member profile on Mountaineers (neighboring organization)
9. Email all participants
   a. Check the box to the left of “name” on your roster participant list to select all

   PARTICIPANTS (3)

<table>
<thead>
<tr>
<th>NAME</th>
<th>PROFILE</th>
<th>PRIVATE</th>
<th>GROUPS</th>
<th>ACTIVITY</th>
<th>ROLE</th>
<th>REGISTRATION</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jeff Flax</td>
<td>Edit or Cancel Review</td>
<td></td>
<td></td>
<td></td>
<td>Participant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Graham Ottley</td>
<td>Edit or Cancel Review</td>
<td></td>
<td></td>
<td></td>
<td>Participant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ben Lee</td>
<td>Edit or Cancel Review</td>
<td></td>
<td></td>
<td></td>
<td>Participant</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   b. Scroll down and select Send Email
c. Complete the required fields, add an attachment or two if you’d like, and click send.

SEND EMAIL

- required field

From: Claire Joseph <testing@cmc.org>
To: Jeff Flax, Graham Ottley, Ben Lee
Subject
Message

Attachment 1
Choose File | No file chosen

Attachment 2
Choose File | No file chosen

Attachment 3
Choose File | No file chosen

SEND

d. If you only wish to email a specific individual you can select the specific participant in step “a” above.

10. Download participant roster

a. Check the box to the left of “name” on your roster participant list to select all
PARTICIPANTS (3)

<table>
<thead>
<tr>
<th>NAME</th>
<th>PROFILE</th>
<th>PRIVATE</th>
<th>GROUPS</th>
<th>ACTIVITY ROLE</th>
<th>REGISTRATION STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jeff Flax</td>
<td>Edit</td>
<td>or</td>
<td>Cancel</td>
<td>Review</td>
<td>Participant</td>
</tr>
<tr>
<td>Graham Ottley</td>
<td>Edit</td>
<td>or</td>
<td>Cancel</td>
<td>Review</td>
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</tr>
<tr>
<td>Ben Lee</td>
<td>Edit</td>
<td>or</td>
<td>Cancel</td>
<td>Review</td>
<td>Participant</td>
</tr>
</tbody>
</table>

b. Scroll down and select Download Selected

Selected people: 3

| SEND EMAIL | COPY EMAIL ADDRESSES | DOWNLOAD SELECTED | PRINT SELECTED |

Roster: Backpack – Bierstadt, MT

<table>
<thead>
<tr>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>PROFILE</th>
<th>PRIVATE</th>
<th>EMAIL</th>
<th>HOME PHONE</th>
<th>MOBILE PHONE</th>
<th>PREFERRED PHONE</th>
<th>STREET ADDRESS</th>
<th>CITY</th>
<th>STATE</th>
<th>ZIP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jeff</td>
<td>Flax</td>
<td></td>
<td></td>
<td><a href="mailto:testing@cmc.org">testing@cmc.org</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>US-0-CO</td>
<td>80401</td>
</tr>
<tr>
<td>Ben</td>
<td>Lee</td>
<td></td>
<td></td>
<td><a href="mailto:testing@cmc.org">testing@cmc.org</a></td>
<td></td>
<td></td>
<td></td>
<td>710 10th St</td>
<td>Golden</td>
<td>US-0-CO</td>
<td>80401</td>
</tr>
<tr>
<td>Graham</td>
<td>Ottley</td>
<td></td>
<td></td>
<td><a href="mailto:testing@cmc.org">testing@cmc.org</a></td>
<td></td>
<td></td>
<td></td>
<td>123 Fake Street</td>
<td>Golden</td>
<td>Colorado</td>
<td>80401</td>
</tr>
</tbody>
</table>

Showing 1 to 3 of 3 entries