



# **Teams Management Website Guide**

**Team Leader**

# Team Leader Guide



## Contents

Step 1: Accessing your Team Leader Dashboard .....	3
Step 2: Navigating your Team Leader Dashboard.....	5
Team Details Tab.....	5
Step 3: Navigating the Action Buttons on the Team Details Tab.....	6
Edit Team Details .....	6
Add Project Funds Details .....	7
Download Forms .....	8
Add Comment .....	9
<b>Step 4: Navigating the Member Details Tab.....</b>	<b>10</b>
Member Details .....	10
Action Buttons .....	11
1. Add Team Member(s) .....	11
2. Download Member List.....	15
3. Download All Documents.....	16
4. Purchase Insurance .....	17
Team Member Section.....	20
1. Change Email Address.....	20
2. Delete Team Member .....	20
3. Review Documents .....	21
4. Update Member Details.....	21
5. Update Travel Information .....	22

# Team Leader Guide



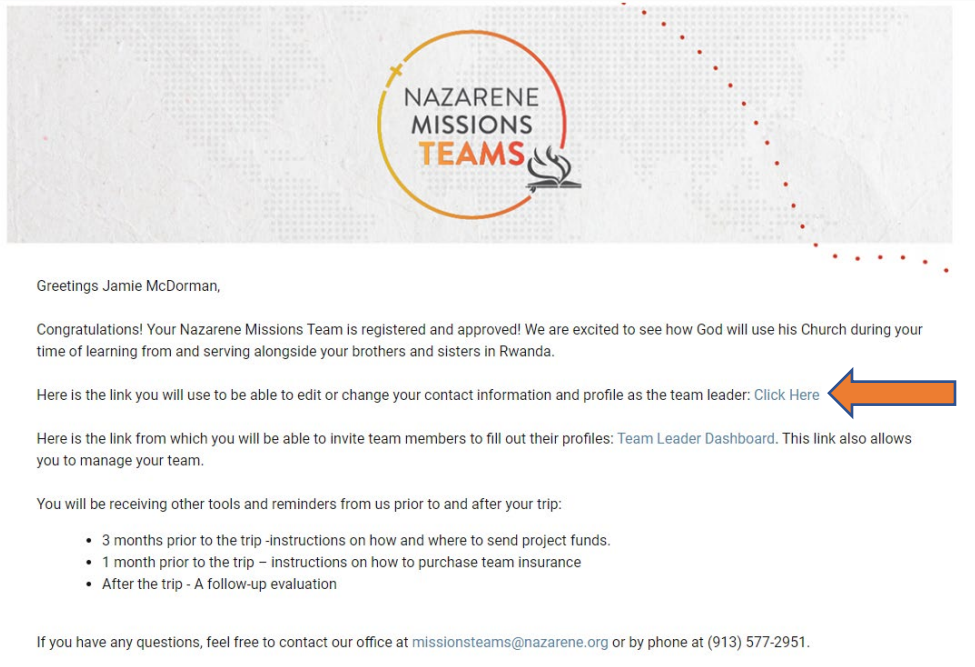
*Nazarene Missions Teams is a ministry that has changed the face of missions in the Church of the Nazarene. As a team leader, you will play an important role to prepare your team to join this vital ministry. Thank you so much for your willingness to serve the church and your fellow teammates in this way.*

*The Teams Management Website will help you manage the many details included in leading a team: documents, team members' contact information and emergency contacts. It's your source for purchasing travel insurance, and it will help you and your site coordinator stay on the same page about travel dates, payments, and any special needs your team members have, such as dietary restrictions.*

*As you navigate the system, use this guide to help. If you have more questions or come across an error, please reach out to us at [missionsteams@nazarene.org](mailto:missionsteams@nazarene.org). We anticipate God will use your team in great ways as you serve in His Kingdom, and we are eager to help as you prepare!*

## Step 1: Accessing your Team Leader Dashboard

- You will be able to access your Team Leader Dashboard by clicking the link in the email that has been sent to you



# Team Leader Guide



- Once you click this link it will route you to your Teams Dashboard

Team Details
Member Details

<b>Name</b>	Jamie Test Team	<b>Departure Date</b>	3/1/2023	<a href="#">Edit Team Details</a>
<b>Team Number</b>	NMT000076	<b>Return Date</b>	3/13/2023	<a href="#">Add Project Funds Details</a>
<b>Project Name</b>	Flagstaff Kinlani Church of the Nazarene			
<b>Project Country</b>	United States	<b>Team Leader</b>	Jamie McDorman	
<b>Classification</b>	Church	<b>Site Coordinator(s)</b>	Jamie McDorman	
	USA/Canada   Arizona   Chandler First			

**Comments** 🔍 ↻ 🔄 ⋮

**2/2/2023 10:40 AM - jamiemcdorman@gmail.com**

Team is Approved

**2/2/2023 10:39 AM - jamiemcdorman@gmail.com**

New Team Created

**Project Funds**

<b>Date Submitted</b>	2/15/2023
<b>Submitted Amount</b>	\$5,000.00
<b>Submission Method</b>	Check

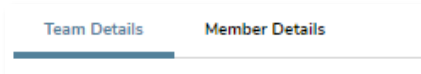


# Team Leader Guide

## Step 2: Navigating your Team Leader Dashboard

There are two tabs at the top of your page: Team Details and Member Details

### Team Details Tab



The Team Details tab will automatically open when you launch your Team Leader Dashboard.

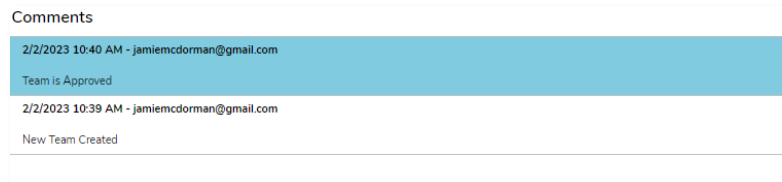
- The section at the top is your team's information: **please note the information listed in the picture is there as an example**

Name	Jamie Test Team	Departure Date	3/1/2023
Team Number	NMT000076	Return Date	3/13/2023
Project Name	Flagstaff Kinlani Church of the Nazarene		
Project Country	United States	Team Leader	Jamie McDorman
Classification	Church	Site Coordinator(s)	Jamie McDorman
USA/Canada   Arizona   Chandler First			

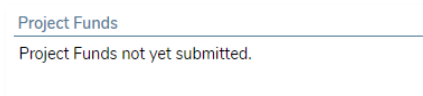
- The section to the right holds your Team Leader Action buttons. They allow you to: Edit Team Details, Add Project Funds Details, Download Forms, & Add Comments (at the bottom of the page).



- Comment section: this area is where you track the progress of your team, i.e. when it was created, approved, etc. It is also where you can add notes about your team that your Site Coordinator and the Global Missions staff can see.



- Project Funds: To the left and below your team information you can see the Project funds details you have entered.

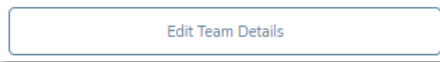


# Team Leader Guide



## Step 3: Navigating the Action Buttons on the Team Details Tab

### Edit Team Details



By clicking this button, it will open up a new window that will allow you to edit your Team's details.

A screenshot of a web form titled "Edit Team Details". The form contains several fields: "Project" (Flagstaff Kinlani Church of the Nazarene), "Classification" (Church), "Region" (USA/Canada), "District" (Arizona), "Church" (Chandler First), "Team Name" (Jamie Test Team), "Team Number" (NMT000076), "Departure Date" (3/1/2023), and "Return Date" (3/13/2023). There are "CANCEL" and "SUBMIT" buttons at the bottom.

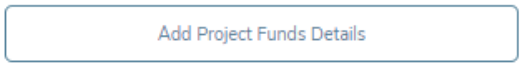
- Here is where you can update or modify:
  - Team Classification (what type of team you are; Church, Collective, District, University, or Non-Nazarene)
  - Region your team is from (Africa, Asia-Pacific, Eurasia, Mesoamerica, South America, USA/Canada)
  - District your team is from (this list is populated based on the region that was selected)
  - Church your team is from (this list is populated based on the district that was selected)
  - Team name
  - Departure Date & Return Dates. **Before changing dates in the system, please contact your Site Coordinator to ensure these new dates will work with their schedule.**

Once you have made the changes, click submit. If nothing needs to be changed, click Cancel or Submit.

# Team Leader Guide



## Add Project Funds Details



Clicking this button will open a window to enter details of how you have submitted your project funds.

A screenshot of a form titled "Details of Project Funds". It contains a checkbox labeled "Project Funds Submitted", a date field labeled "Date Submitted" with a calendar icon, a currency field labeled "Amount Submitted" with a dollar sign and the value "0.00", and a dropdown menu labeled "Submission Method". At the bottom are "CANCEL" and "SUBMIT" buttons.

There are several things that will need to be completed in this mini form.

1. Have you submitted your project fund, click the box?

A checkbox with the text "Project Funds Submitted" next to it.

2. Enter the date you submitted the project funds

A date input field with the placeholder text "<M/d/yyyy>" and a calendar icon.

3. Enter the amount you submitted

A currency input field with the label "Amount Submitted", a dollar sign, and the value "0.00".

4. Select the Method in which you submitted those funds. Click the arrow on the right of the box and a drop-down menu will appear.

A dropdown menu showing two options: "Funding the Mission" and "Check".

5. Click Submit

A rectangular button with rounded corners and a light blue border, containing the text "SUBMIT" in a light blue font.

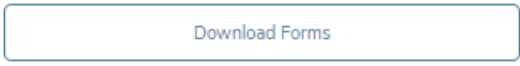
Once this has been entered, it will appear under the Project Funds area on your dashboard. Don't be alarmed if it takes a few minutes for it to appear.

Project Funds	
Date Submitted	2/15/2023
Submitted Amount	\$5,000.00
Submission Method	Check

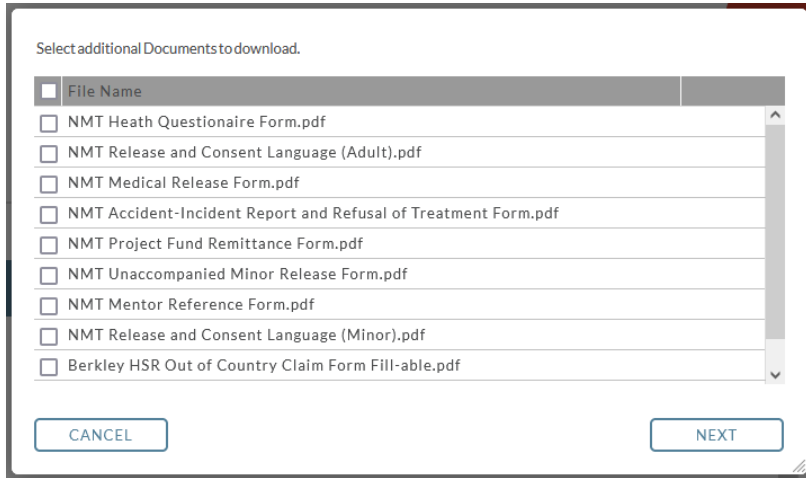
# Team Leader Guide



## Download Forms

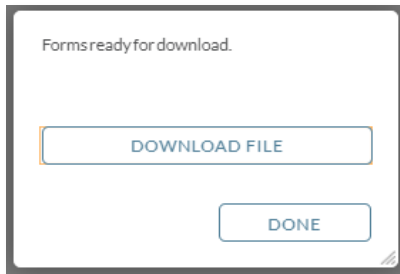


Clicking this button will open up a window that allows you to see all of the forms that will be sent to each Team Member and extra forms that may be needed while you are on your trip. Please note that it will allow you to download a printable version of each form.



Click the box next the form(s) that you want to download, then click Next. **\*If you have a minor who will be traveling with the team without their parent or legal guardian, you are required to carry the notarized "NMT Unaccompanied Minor Release Form" with you at all times.**

This window will open up and click "Download File."



Go to the downloads folder in your computer. The files will be there and ready to print.



# Team Leader Guide

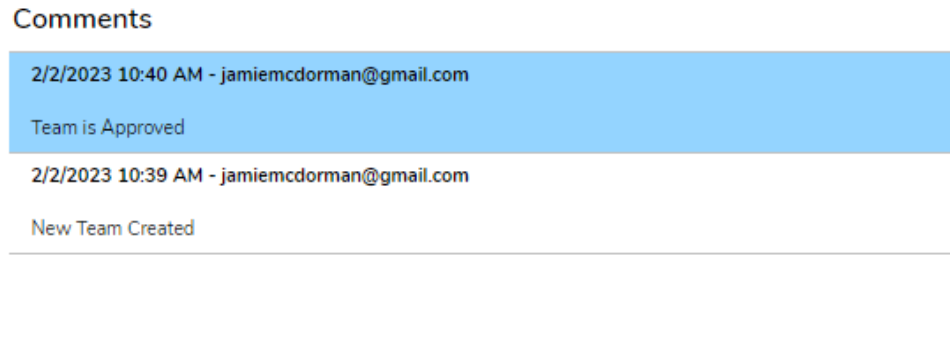


## Add Comment

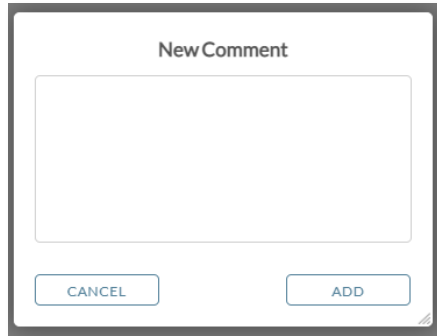
The “Add Comment” button is at the bottom of your screen.



It allows you to add a comment to the Team Dashboard which can be seen by the Site Coordinator and the Global Missions (GM) staff. It is a place for you to relay information about your team, ask questions, or see comments from the Site Coordinators and the GM team. This section will also be the place where you can see when your project funds have been received. The GM team will make notes with the dates when the money was received.



Once you click “Add Comment,” a new window will open. Add your comment or question to this area and then click “Add.”

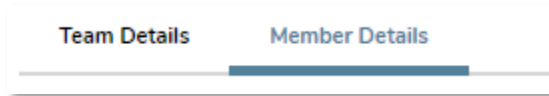


Allow a day or two for the question to be answered. If it is an urgent question, please email the Site Coordinator or the GM staff.

# Team Leader Guide

## Step 4: Navigating the Member Details Tab

### Member Details



This tab will show you information on your team members, allow you to review the documents they have uploaded, remove team members, add team members, purchase insurance, & update individual travel dates.

**Member Details**

<b>Name</b>	Jamie McDorman	<b>DepartureDate</b>	3/1/2023
<b>Email</b>	Jamiemcdorman@gmail.com	<b>ReturnDate</b>	3/13/2023
<b>PhoneNumber</b>	2093243367		

Add Team Member(s)

Download Member List

Download All Documents

Purchase Insurance

**Team Members** 🔍 ↻ 🔄 📄 ⋮

	NAME	EMAIL	INFO VERIFIED	REFERENCE RECEIVED
1	★ Jamie McDorman	Jamiemcdorman@gmail.com	True	False
2	Billy Bob Thorntom		False	False
3	Michael Scott	dundermiflin@gmail.com	False	False
4	Pam Halpert	jamiemcdorman@gmail.com	False	False
5	Jim Halpert	Halpert@athleap.net	False	False
6	Kevin Malone	gosteelers@juno.com	False	False
7	Creed Bratton	scubalover@juno.com	False	False
8	Angela Schrute	jamiemcdorman@gmail.com	True	True

\*please note that these names are only for example purposes.

# Team Leader Guide

- **Member Details Section:** This section will display information for the team member you have clicked on.

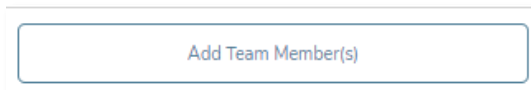
Member Details			
Name	Michael Scott	Departure Date	3/1/2023
Email	dundermiflin@gmail.com	Return Date	3/13/2023
Phone Number	5305621469		

This is a quick glance at their information: name, email, phone number and travel dates.

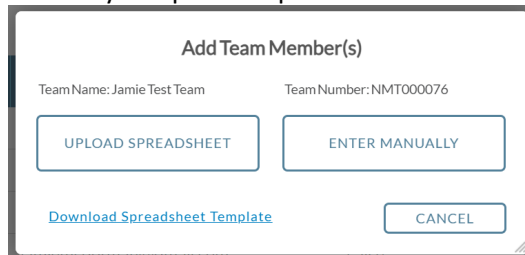
**Action Buttons:** The top right section: 1. Add Team Member(s), 2. Download Member List, 3. Download All Documents, 4. Purchase Insurance



## 1. Add Team Member(s)



When you click “Add Team Members,” it will open a window to allow you to enter all of your team members. You can either enter them manually or upload a spreadsheet.



# Team Leader Guide



- To enter team member(s) manually
  - Select “Enter Manually.”

A rectangular button with the text "ENTER MANUALLY" in all caps.

- A new window will open. Click “Add Member” and another window will open.

A window titled "Add New Team Members" with two buttons: "ADD MEMBER" and "REMOVE SELECTED". Below the buttons is a table with columns: "Given Name", "Family Name", "Email", "Departure ...", and "Return Date".

- Fill out the information for each person who will be going on the trip.

A form titled "New Member Information" with fields for: \*Given Name, \*Family Name, \*Email, \*Age (at time of trip), \*Departure Date (with a date picker showing 3/1/2023), and \*Return Date (with a date picker showing 3/13/2023). At the bottom are "CANCEL" and "SUBMIT" buttons.

\* Red asterisks indicate required fields.

- Click Submit

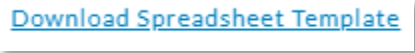
# Team Leader Guide



- To enter team member(s) by uploading a spreadsheet with their information



- If you choose this option you will need to download a template. Click the “Download Spreadsheet Template” hyperlink and the template will automatically download to your downloads folder.



- When you open the document, it will look like the screenshot below. Fill the spreadsheet out for each person who will be going on the NMT Trip.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Please fill out <b>Contact Information</b> and <b>Emergency Contact Information</b> for each Team Member.											
2	<b>Country Code</b> and <b>Residence Country Code</b> = 3 character abbreviation. E.x. United States of America = USA											
3	<b>Phone</b> - Please enter only numbers.											
4	<b>Age</b> = Age at the time of the Trip.											
5	<b>Note:</b> Begin adding Team Members on Row 9.											
6	<b>Contact Information</b>											
7	Given Name	Family Name	Email	Age	Gender	Address Line 1	Address Line 2	Country Code	City	State/Province	Phone Type	Phone
8	Team	Member	teammember@email.com	40	Male	1234 W Street Ave	Apt 123	USA	Lenexa	KS	Mobile	1234567890
9												
10												
11												
12												
13												

Given Name = First Name, Family Name = Last Name, etc.

- Once you have completed the spreadsheet, go back into the system and click the button “Upload Spreadsheet.”



# Team Leader Guide



- A window will open up fill out the information and then you can drag the file into the box or you can choose a file from your computer.

A screenshot of a web form for uploading a spreadsheet. The form is titled "Team: Jamie Test Team (NMT000076)". It contains a question "Do all Team Members have the same Travel Dates?" with radio buttons for "Yes" and "No". Below this is a section titled "Upload Completed Spreadsheet" with a dashed box containing an upward-pointing arrow and the text "Drag file here". Below the dashed box is the text "or" and a "CHOOSE FILE" button. At the bottom of the form are two buttons: "CANCEL" and "UPLOAD".

Once you have the file in the box, click "Upload." It will automatically enter all of the Team Members included in the spreadsheet.

- When you have entered the Team Members in the system, an email will be automatically sent to them. The email includes a link to verify their information. It will also include documents that they will need to fill out and upload to their profile.
- To remove a person from the Team Members list, click on the name and then click the "Remove Selected" button.

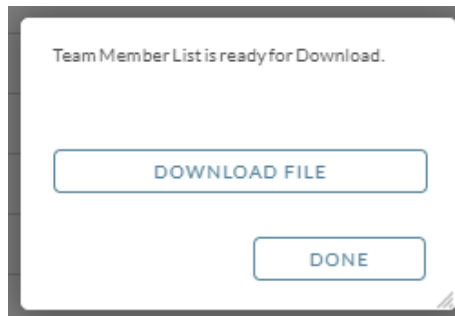


# Team Leader Guide

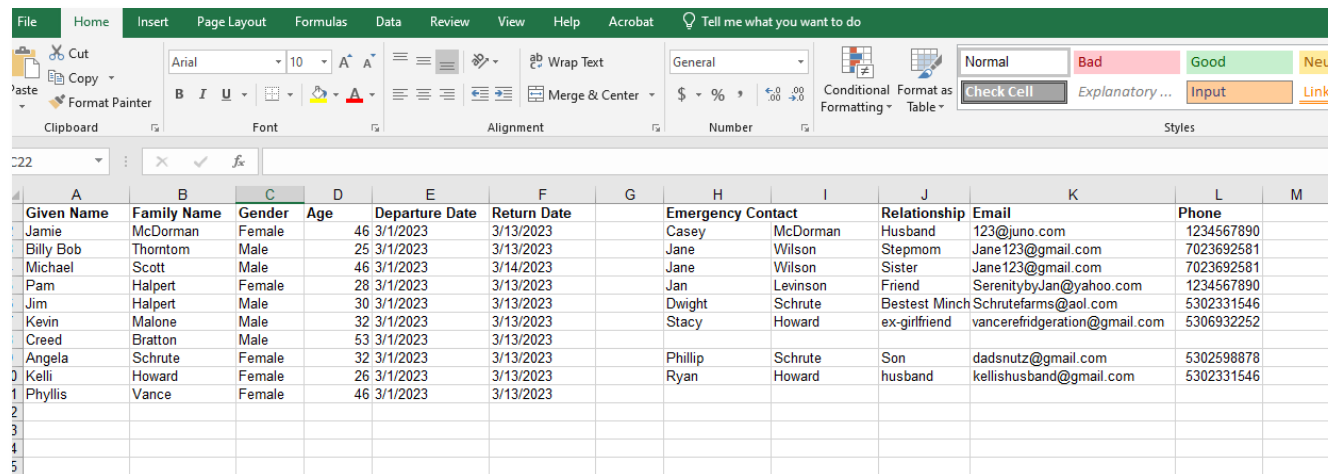
## 1. Download Member List



- This button allows you to download a excel spreadsheet of all of the members of your team. After clicking “Download Member List,” the window below will open. Click “Download File,” and it will automatically download to your Download folder.



Example of a downloaded Team Member List:



Given Name	Family Name	Gender	Age	Departure Date	Return Date	Emergency Contact	Relationship	Email	Phone
Jamie	McDorman	Female	46	3/1/2023	3/13/2023	Casey McDorman	Husband	123@juno.com	1234567890
Billy Bob	Thomtom	Male	25	3/1/2023	3/13/2023	Jane Wilson	Stepmom	Jane123@gmail.com	7023692581
Michael	Scott	Male	46	3/1/2023	3/14/2023	Jane Wilson	Sister	Jane123@gmail.com	7023692581
Pam	Halpert	Female	28	3/1/2023	3/13/2023	Jan Levinson	Friend	SerenitybyJan@yahoo.com	1234567890
Jim	Halpert	Male	30	3/1/2023	3/13/2023	Dwight Schrute	Bestest Minch	Schrutefarms@aol.com	5302331546
Kevin	Malone	Male	32	3/1/2023	3/13/2023	Stacy Howard	ex-girlfriend	vancerefridgeration@gmail.com	5306932252
Creed	Bratton	Male	53	3/1/2023	3/13/2023				
Angela	Schrute	Female	32	3/1/2023	3/13/2023	Phillip Schrute	Son	dadsnutz@gmail.com	5302598878
Kelli	Howard	Female	26	3/1/2023	3/13/2023	Ryan Howard	husband	kellishusband@gmail.com	5302331546
Phyllis	Vance	Female	46	3/1/2023	3/13/2023				

It will list all of the Team Members, their information, and their emergency contact information.

# Team Leader Guide



## 2. Download All Documents

Clicking this button will open up a window that includes both required documents for team members as well as documents for use during an emergency situation the documents that will be either required for each team member, or important for you to have in the case of an emergency.

A screenshot of a software window titled "Select additional Documents to download." The window contains a list of documents, each with a checkbox to its left. The documents listed are: "NMT Heath Questionnaire Form.pdf", "NMT Release and Consent Language (Adult).pdf", "NMT Medical Release Form.pdf", "NMT Accident-Incident Report and Refusal of Treatment Form.pdf", "NMT Project Fund Remittance Form.pdf", "NMT Unaccompanied Minor Release Form.pdf", "NMT Mentor Reference Form.pdf", "NMT Release and Consent Language (Minor).pdf", "Berkley HSR Out of Country Claim Form Fill-able.pdf", and "WW Berkley International Insurance Nov 22.pdf". At the bottom of the window, there are two buttons: "CANCEL" on the left and "NEXT" on the right.

Click the box next to the document you need to download, then click "Next." Click "Download File" and it will automatically download to your downloads folder. When you are finished, click "Done."

A screenshot of a software window with the text "Team Member documents are ready to download." centered at the top. Below the text, there are two buttons: "DOWNLOAD FILE" and "DONE". The "DOWNLOAD FILE" button is highlighted with a blue border.



# Team Leader Guide



## 3. Purchase Insurance

Clicking “Purchase Insurance” will open up a window that lists all of the team members. Select the people who will be traveling to this Nazarene Missions Teams project, and then click “Continue.” **\*Every person must purchase the Nazarene Missions Teams Insurance if they will be traveling to a NMT project regardless of their personal insurance coverage.**

Select Team Members to Purchase Insurance for.

<input type="checkbox"/>	Given Name	Family Name	Email
<input type="checkbox"/>	Jamie	McDorman	Jamiecdorman@gmail.com
<input type="checkbox"/>	Billy Bob	Thorntom	
<input type="checkbox"/>	Michael	Scott	dundermiflin@gmail.com
<input type="checkbox"/>	Pam	Halpert	ilovejim@gmail.com
<input type="checkbox"/>	Jim	Halpert	Halpert@athleap.net
<input type="checkbox"/>	Kevin	Malone	gosteelers@juno.com
<input checked="" type="checkbox"/>	Creed	Bratton	scubalover@juno.com
<input type="checkbox"/>	Angela	Schrute	Sprinkles4eva@gmail.com
<input type="checkbox"/>	Kelli	Howard	ryanswifefinally@gmail.com
<input type="checkbox"/>	Phyllis	Vance	formerdance@juno.com

CANCEL CONTINUE

Once you have clicked “Continue,” a new window will open. Verify the list of people traveling to the Nazarene Missions Teams Project. Then click “Confirm.”

Selected Persons to Purchase Insurance for.

- Jamie McDorman
- Billy Bob Thorntom
- Michael Scott
- Pam Halpert
- Jim Halpert
- Kevin Malone
- Creed Bratton
- Angela Schrute
- Kelli Howard
- Phyllis Vance

CANCEL CONFIRM

# Team Leader Guide



- A new window will open to indicate the payment method.

A screenshot of a web application window showing payment details. The window has a title bar with "TRUE" and "FALSE" labels. The main content area is divided into three columns: "Purchaser Information", "Type of Travel", and "Amount Due".

Purchaser Information	Type of Travel	Amount Due
Jamie McDorman 6200 W. 137th Street Apt 302 Overland Park, KS 66223, USA Jamiedorman@gmail.com	Work & Witness Trip  Number of Travelers 11  Payment Method ▼	\$163.75

Travel Dates:  
3/1/2023-3/13/2023

At the bottom right, there are two buttons: "CANCEL PAYMENT" and "CONTINUE".

Make sure the total number of travelers is correct

- Under the Payment section there is an arrow. Click the arrow and it will show a drop-down list of payment options.

A screenshot of a dropdown menu for "Payment Method". The menu is open, showing three options: "Check", "Credit Card", and "Other (Allocation/Deputation/JE)".

- Choose Check or Credit Card, ("Other" is for Global Missions' use only)
  - If you choose **Check**, you will see the following note. Click "Continue."

You have chosen to pay for your insurance purchase via Check. Once received please allow 10 business days for us to process your payment.

- A new window will open. Download the instructions for mailing the insurance payment. Click "Done" after you have downloaded the document. It will give you the insurance order number.

A screenshot of a web application window with a white background and a grey border. The text inside reads: "Use the button below to Download instructions for mailing in your payment. This also includes a document that must be mailed in with your check." Below the text is a button labeled "DOWNLOAD FILE". At the bottom right, there is a button labeled "DONE".

# Team Leader Guide



- If you choose **Credit Card**, click “Continue.”
  - A new window will open to enter the credit card information to pay for the insurance.

A screenshot of a web form titled "CHURCH OF THE NAZARENE" with a logo. Below the title, it says "Please enter your Credit Card information:". The form contains several input fields: "Card Holder Name" with the text "Pastor Jane Doe"; "Card Number" with "4111 1111 1111 1111"; "Expiration Date" with "09 / 23"; "CVV" with "400"; and "Postal Code" with "40000". A "SUBMIT" button is located at the bottom right of the form area.

- Click “Submit.” You will get a confirmation code when the payment has gone through.

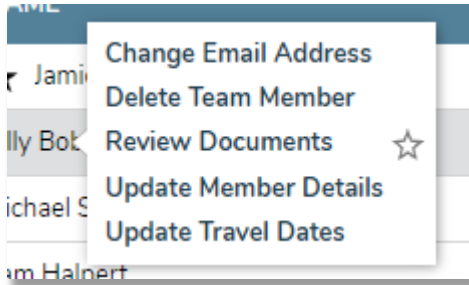
# Team Leader Guide



## Team Member Section

Right click on a Team Member's name and a list will open with the following options:

1. Change email address
2. Delete Team Member
3. Review Documents
4. Update Member Details
5. Update Travel Dates.



1. **Change Email Address** – a window will open to enter the current email and the new email. Click “Submit.”

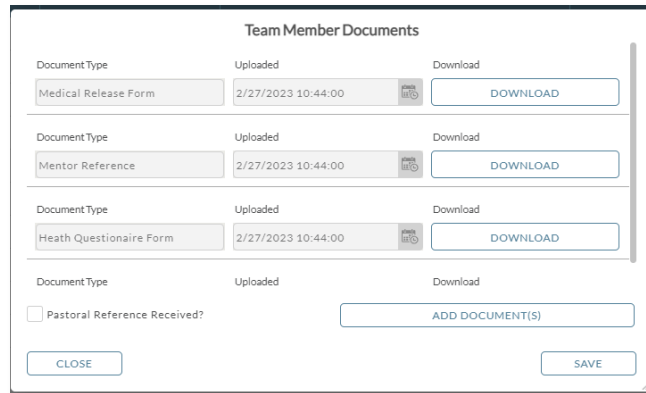
A dialog box titled "Change Email Address" with two input fields: "Current Email" and "New Email". Below the fields are two buttons: "CANCEL" and "SUBMIT".

2. **Delete Team Member** –It will ask you to confirm the team member should be deleted before completing the action.

A confirmation dialog box with the text "Are you sure you want to delete this Team Member?". Below the text is the name "Billy Bob Thorntom". At the bottom are two buttons: "NO" and "YES".

# Team Leader Guide

3. **Review Documents** – This allows you to review the documents the team member has uploaded. It also allows you to upload a document the Team Member has given you to upload. To add documents for the Team Member, click “Add Document” and select the document you wish to upload from your computer.



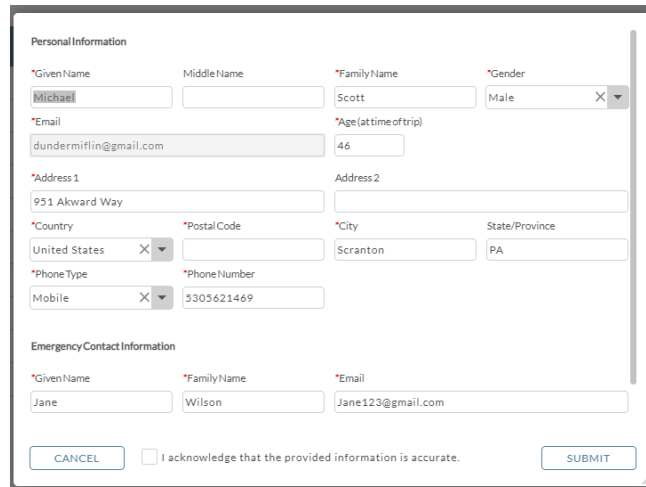
Document Type	Uploaded	Download
Medical Release Form	2/27/2023 10:44:00	DOWNLOAD
Mentor Reference	2/27/2023 10:44:00	DOWNLOAD
Health Questionnaire Form	2/27/2023 10:44:00	DOWNLOAD
<input type="checkbox"/> Pastoral Reference Received?		ADD DOCUMENT(S)

CLOSE SAVE

 Pastoral Reference Received?

If you see they have uploaded their Pastoral Reference, click the box on the bottom left of the window. Then click “Save.” This will show on the list of Team Members that this person has submitted the necessary reference, indicated by the word “true” in the column.

4. **Update Member Details** – This allows you to update the Team Member’s Personal Information and Emergency Contact information. Click “Submit” when you are finished updating the information.



**Personal Information**

\*Given Name: Michael Middle Name: Family Name: Scott \*Gender: Male

\*Email: dundermiflin@gmail.com \*Age (at time of trip): 46

\*Address 1: 951 Akward Way Address 2:

\*Country: United States \*Postal Code: \*City: Scranton State/Province: PA

\*Phone Type: Mobile \*Phone Number: 5305621469

**Emergency Contact Information**

\*Given Name: Jane \*Family Name: Wilson \*Email: Jane123@gmail.com

CANCEL  I acknowledge that the provided information is accurate. SUBMIT

 I acknowledge that the provided information is accurate.

SUBMIT

\*You must check the box at the bottom that you acknowledge the information is accurate

# Team Leader Guide



- 5. **Update Travel Information** – This allows you to change the travel dates for a Team Member.

A screenshot of a web form titled "Team Member Information". The form contains several input fields: "Given Name" with the value "Michael", "Family Name" with the value "Scott", "Email" with the value "dundermiflin@gmail.com", "Departure Date" with the value "3/1/2023", and "Return Date" with the value "3/13/2023". Each date field has a small calendar icon to its right. At the bottom of the form are two buttons: "CANCEL" on the left and "SUBMIT" on the right.

\*Anytime you change travel dates please notify the Site Coordinator before making the change.