Focus Missions Manual
cpcdanville.focusmissions.com

I. **Focus Missions Overview**

Focus Missions is an online program designed to manage mission trips. Missions trips are set up and then launched to accept applicants. Applicants complete an application and, once approved, are shown other documentation requirements and due dates. Funding goals are set up and funds collected are tracked. The Team Leader and/or other Admin users manage the information. Below is a summary of the steps involved and following that is more detail information with links to support pages within Focus Missions with more information. [Note: there are references to integration with CPC's payment system but at this date CPC has not agreed to this integration.] Access to general support can be found at: https://support.focusministry.com/hc/en-us/categories/200253508-Focus-Missions

A. Account Access and System Set-Up

Access is found by logging in at cpcdanville.focusmissions.com. The public home page that shows all active trips is at cpcdanville.focusmissions.com/!/. See II. "System Set-Up" below for information on setting up system parameters applicable to all trips.

B. Trip Set-Up

- Trips are accessed by clicking on Trips – My Trips. From here a new trip may be created or trips already set up may be viewed. Trips are set up with trip description, travel dates, registration dates, max headcount, age range accepted, funding goals, funding due dates and document requirements with due dates. For Set-Up instructions, see III. "Trip Set-Up" below.

- Once set up and ready for applicants, set the status of the trip to Launched. This will start the billing and enable people to apply to go on a trip. The trip will appear on the public home page showing all Focus Missions trips shown in a link on the CPC Short Term Missions website. Alternatively, the trip URL can be found by clicking on the trip in the My Trips window and clicking to see the Detail page.

C. Trip Management

- Trip Leaders or their designee review and approve applications unless the trip is set up to automatically approve applicants (not recommended). As long as the box is checked in their account preferences for an individual trip, they will get a daily report of applicants.

- **IMPORTANT**: The person reviewing the application must determine if the person has to complete the Physician's Release which is needed if the person answers yes to any of the medical questions. Completion of the Physician's Release is set up as a requirement and is noted as a condition of approval in the approval email. If NOT NEEDED, the approval email can be amended to remove the condition. Further, the Trip Leader is to edit the team member's profile and indicate that the requirement is completed.

- Meetings are set up with dates, location, homework due. Reminders are automatically sent out and attendance can be tracked.

- Trip Leaders can see on the Team Members page an overview of each participant's fundraising status and completion of requirements. Reminder emails of past due items are automatically sent out. Leaders also can send group emails, individual emails or start discussion threads.
- CPC staff manually adds any donations received including any scholarship funds granted. Further, donations from events such as fundraisers by participants can be allocated to participants. [NOTE: If integration with the CPC payment system is approved at some point, funds received by credit card will not have to be manually added.]

D. Participants
- People apply through the trip URL linked from CPC's website or sent separately by email. Emails are automatically generated upon applying and, again, upon being approved (or denied).
- Applicants have a personal dashboard to track funds paid, requirements due etc. One of the requirements is to review the document "Participant Focus Missions Overview" that helps explain how to use the system.
- Participants may elect to have a personal fundraising page. The content is sourced from the participant's "Trip Story" page. See Appendix A for more information.

E. Cost
- Cost is $20 per month per active trip or a minimum of $20 per month if there is no active trip. Trip is active once the trip is launched. This typically would be around five months before the trip and would occur when you are accepting registrants. Trips with more than 20 participants cost more. Use of their DocuSign services costs $1.00 per document.

II. Trip Set Up
Trips are set up by CPC staff along with the Trip Leader or their designee.

A. Cloning a Trip (best option)
If a trip is similar to another trip that has been set up you can copy or "clone" the existing trip, rename the copied trip and edit the details. See https://support.focusministry.com/hc/en-us/articles/219015548-Cloning-an-Existing-Trip-

B. Create Trip from Scratch
1. From the Trip – My Trips menu, select to "Create a New Trip." Then follow these steps https://support.focusministry.com/hc/en-us/articles/218810978-How-to-Create-a-New-Trip
2. Set up with overview of trip including registration dates, max headcount, age range accepted.
3. Determine if you will allow participants to set up fundraising pages and, if so, whether you will allow them to raise more than the funding amount. (NOTE: CPC verbiage MUST be used in the fundraising page. See Appendix C – "Fundraising" for details.)
4. Determine funding milestones, e.g. when airline cost is due, 50% of ground cost and 100% of ground cost. Cumulative Dollars or %ages may be entered.
5. Determine if you will use an existing trip application or create a new one within the trip itself. NOTE: it is best to use the standard CPC application set up. It contains medical

questions to determine if the Physician Release form is required and contains vital information in the event of emergency.

6. Determine if you will allow people to apply as a group. This is ideal for parents with minor children. See https://support.focusministry.com/hc/en-us/articles/115004963567-Managing-a-Family-or-Group-Trip for more information. This preference is entered when selecting the application to use.

7. Determine what requirements you will want team members to complete or check off before your trip begins. These will have already been created in your Requirements Bank. See II.A.3. Requirements regarding how to set up new requirements. Standard Requirements that could be added to a trip are described in the document "Focus Missions Requirements and Checklists" along with recommended due dates.

C. Team Member Profile Information
In setting up a trip it is IMPORTANT to understand how Team Member profile information gets into the system. Information gets into the profile as follows:

1. Name, address, phone, email, date of birth and gender are automatically asked by Focus Missions at the time of application.

2. Photo, passport information and travel information are added by the Team Member after being accepted. A requirement to complete this information should be include in their checklist.

3. Answers to Profile questions are stored in Focus Missions so they don't have to be answered every time they apply for a trip. A requirement to review this information should be include in their checklist.

4. Application questions must be completed each time someone applies for a trip.

5. Emergency Contact info is asked by Focus Missions if turned on by the Focus Missions Administrator under the Admin – Emergency Contacts section.

D. Editing Trip Details
Note that the trip set up can be edited by clicking on My Trips – [Trip Name] – Details. See https://support.focusministry.com/hc/en-us/articles/217927138-Making-Changes-to-an-Existing-Trip-.

E. Manage Admins
If you have permission, choose to add, edit or delete admins for the trip only. You may specify their permissions at the time they are invited to become an admin.

F. Status
Trips are either in set up mode, launched or archived.

- While the trip is being set up, the trip is in set up mode. From the My Trips page, trips in set up mode have a hammer and screwdriver covering the trip image.
- Once you are ready to accept trip applicants, you change the status to "Launched" here. Once a trip is launched the monthly billing starts and continues until the trip is archived.

Trips should remain active at least until the end of the month that the team returns so that all information is fully available.

- Archived Trips may be viewed on the My Trips page by clicking the dropdown arrow next to "Current Trips" on the top right. This may be useful if you want to clone an archived trip (from the trip details page) for use in setting up a new trip.

III.   Trip Management by Leaders

A. Dashboard
The dashboard provides an overview of the trip including percent of funds that have been raised, # of days to departure, upcoming meetings and percent of requirements that have been met. Details of select information can be seen by clicking the links here.

B. Details
Allows you to edit the trip information. See https://support.focusministry.com/hc/en-us/articles/217927138-Making-Changes-to-an-Existing-Trip-. IMPORTANT

C. Applicants
Any pending applicants appear in this section. Using the "Actions" button you may accept, deny or withdraw the applicant. Note that you may also select to Edit information in the applicant profile, add a guardian name and/or add confidential notes.

- IMPORTANT: If an applicant indicates that they have a medical condition, the Physician's Release Form must be completed by their physician. The person reviewing the application is responsible for determining that the Release Form is needed and to ensure that the application approval email states that the approval is conditional on obtaining a Physician's release. If the person does not need the Physician's Release Form, the requirement to do the form should be marked as complete by the team leader. See https://support.focusministry.com/hc/en-us/articles/218399957-how-to-manually-complete-team-members-requirements for instructions regarding how to do this. **The acceptance email should be modified to exclude reference to this requirement.**

D. Team Members
Accepted applicants appear as Team Members. When you click on the member you may edit their information, change their status or add a confidential note. Other items to note:

1. Download Team Roster to Excel – Do so by clicking on "Actions" and all info on each person will appear.
2. Email the team - Do so by clicking on "Actions".
    - Email an individual member by clicking on their name and clicking on their email address in the profile.
3. Modify Individual Funding Goal - A person may have a different funding goal than the general goal of the group. For example, the person may get their own airfare while CPC is buying airfare for most of the group. Also, Sintaro Leaders do not pay for ground costs for their trip. To modify the goal, click on their name and click on "Change" next to their

Funding Goal on their profile page. IMPORTANT: if the funding goal is changed for an individual, a confidential note MUST be added to explain the reason for the changed goal.

E. Funding

A list of team members appears with their progress on raising funds. You may add funds here for the trip in total (these are unallocated funds) or you may click on a participant's name and click to "$ Add Funds" here. Any scholarship funds would be added to the person's account here. (Funding types are set up by an Admin under Admin – Components – Allocation Types menu.) This management of funds raised must be done by a CPC staff member based on reporting by CPC accounting. [NOTE: at some future date CPC may allow Focus Missions to be integrated with the CPC payment system. If that occurs, only Cash donations and ST Mission Fund approvals will have to be manually added.]

F. Mission Meetings
   1. Mission meetings allow for trip leaders and admins the ability to inform team members / leaders of meetings that are happening in preparation for the mission trip. These meetings are for a specific date/time, and can be at an address, a landmark or even a virtual conference. Mission Meetings can also be tied to task requirements to make sure when attendance is taken for the meeting, the individual requirement is marked as fulfilled.
   2. Trip Leaders or Admin Users may set up a meeting at the trip level from the Trip Dashboard or Meetings menu items found after selecting the trip by clicking on Trips – My Trips. See https://support.focusministry.com/hc/en-us/articles/115003920613-New-Feature-Mission-Meetings for more information.
   3. It is helpful to add homework requirements, if any, to meeting notes.
   4. Attendance can be tracked by selecting the meeting and then the attendance option. Click all individuals who attended the trip.

G. Discussions

Discussions may be started or commented on by any Team Member. Members may elect in the "Preferences" section whether or not to get notifications of new discussion threads or comments so if information is important or time sensitive, send a group email.

H. My Preferences

Select when you wish to receive email notifications.

IV. **Participants**

When an individual decides to apply for a trip from the Focus Missions website set up for that purpose, they are directed to set up a Focus Missions account and complete the profile and application questions. See https://support.focusministry.com/hc/en-us/articles/216229128-Applying-For-and-Managing-Your-Trip-as-a-Participant- for more information. Once they are approved, either at the time of application or later by the trip leader, they can sign in to cpcdanville.focusmissions.com to view information about the trip. After clicking on their trip they will find the following:

A. Dashboard and Details
   The Dashboard contains an overview of the individual participant's funds raised, requirements met, upcoming meetings and recent donations. Any information in your profile can be updated from here.

B. Details
   This provides an overview of the trip and funding requirements. The description will appear on your fundraising page.

C. Trip Story/Fundraising
   This will be used on your fundraising page should you desire to raise funds. If blank, the fundraising page will default with the trip detail and CPC required language. See https://support.focusministry.com/hc/en-us/articles/218690338-What-is-a-Trip-Story-and-is-that-required- see Appendix A for more information.

   Note: At a future date we may be able to collect funds through Focus Missions and have an automatic integration with CPC's payment system. Until then, a link will be inserted that will direct the donor to a CCB form so that the donor can accept the terms of the donation.

D. Checklist
   This shows what is due and when. You can take actions by clicking on the requirement. See https://support.focusministry.com/hc/en-us/articles/217891108-Fulfilling-Your-Requirements if you have questions. NOTE: If you have administrative privileges AND are going on the trip, you will be able to select your name as a participant on the trip to fulfill your participant requirements. The Checklist will not appear if you click on the trip itself.

E. Meetings
   This provides you with a list of meetings. Click on the meeting for details such as time, meeting place and items due, if any.

F. Team Members
   Provides a list of Team Members and their URLs to their fundraising page.

G. Discussions/My Preferences
   You can start or comment on a discussion. Preferences are set to indicate if you want to be notified of new discussions or comments.

H. How to Pay
   - A requirement will be added to the trip called "Make Payments". This contains a link to the CCB form that will be used to process trip payments.
   - Note: If at some time the integration with CCB is set up, a participant may set up a payment schedule and provide a credit card that will be charged on specified dates. Funds due will automatically adjust as funds are raised.

V. **System Set-Up (Admins Only)**

Periodically adjustments will need to be made to the overall set up of Focus Missions. These may only be made by users with the proper permissions as defined under Admin – Users. Common areas that may need to be adjusted are listed below along with a link to the Focus Missions site describing how to make the changes. The document "Focus Missions & CPC Resource Center Overview" contains a list of existing requirements and other information currently set up and available. In general, documents are added to the CPC Resource Center webpage and added to the checklist for reference where possible.

A. Public Home Page

Settings for the home page which appears for all CPC trips is found at Admin-Settings – Public Home. CPC only uses the page for mission trips. - https://cpcdanville.focusmissions.com/settings#launch-page

B. Admin - Components
1. Overview - Found under the Admin menu, this section sets up documents and requirements that can be used in setting up trips.
2. Documents – These can be created and edited to be used in the Requirements set up for docusign. See https://support.focusministry.com/hc/en-us/articles/218436547-Creating-and-Editing-Documents-for-eSignatures . Focus Missions has variables that can be inserted.
3. Requirements - A requirements bank is created for all the things you want your team members to be sure and check off before your trip begins. Requirements may be unique to underage members or their guardians. When adding a requirement to a trip during set up, you indicate whether the requirement is needed for team leaders (L) and/or participants (P) and the due date is set. See https://support.focusministry.com/hc/en-us/articles/217475628-Creating-your-Requirements-Bank- for information on how to create.
   - Documents to be downloaded and uploaded are added from files contained in PCloud CPC Missions/ST Mission Team/Focus Missions/Focus Missions Documents. NOTE: if documents are modified, the Requirement with the old document must be deleted and a new Requirement added with the new document.
4. Allocation Type – These are the types of payment that are accepted.
5. Filters – These categories can be used to describe the type of trip and allow interested parties to search for specific types of trips.

C. Admin - Profile Questions

These are typically questions that do not change and would be saved by Focus Missions. See https://support.focusministry.com/hc/en-us/articles/218436477-Creating-Custom-Profile-Questions. If a question is active, it is automatically asked with the application.

D. Admin - Emergency Contacts

If you want to ask for emergency contact information, you may specify the number of contacts requested (1 or 2) and additional information that is requested. If you say "yes" that you wish to ask for this information, it will be added to the end of the application questions. Note,

benefit of just asking for the information in the application directly is you can specify that it will not be someone traveling with you.

E. Admin - Manage Admins
1. Admin Users may be added, by invite, or deleted under the "Users" tab. Roles are assigned at the time of the invitation. At least two CPC staff members should be given admin access.
2. All admin users are assigned a Super User role unless other Roles have been set up under the "Roles" tab. See https://support.focusministry.com/hc/en-us/articles/115000958294-New-Feature-Admin-Roles for more information.
3. IMPORTANT: Admins may also be specified at the trip level only for trip leaders.

F. Admin - Reports
Reports consist of listings of online donations received. Since at this time we are not using Focus Missions to receive payments, no reports are used.

G. Admin – Email Settings
Focus Missions generates emails under many different conditions. These Email templates are customizable if you wish to edit them. At this time, the email "Mission Application Accepted" has been customized and may be further customized by the person approving applications before it is sent. See https://support.focusministry.com/hc/en-us/articles/115004410993-Customizable-Emails for more information.

Note that any optional personal message is added to the Email template following the template email so at a minimum, your signature should be added.

H. Admin - Settings
These are generally set up by the CPC Staff to show how pages appear and how the system interacts with other systems (e.g. for payments, payment integration.) Important notes:

1. General - Two Factor Authorization – This can be set up to make the user's information more secure. Individuals may also set up for themselves, if desired, on their profile.
2. Billing – Used to update or change the credit card being charged.
3. Themes – Used to update the church logo and/or change the color scheme used.
4. Public Home Page - Settings for the home page which appears for all CPC trips is found at Admin-Settings – Public Home. CPC only uses the page for mission trips. - https://cpcdanville.focusmissions.com/settings#launch-page

I. Trips – Trip Components
1. Custom Fields - These display information relevant to your trip needs. You may elect to either display your field on your trips' public pages or privately to your trip admins for reference or reporting purposes. Fields set up are available for all trips. See https://support.focusministry.com/hc/en-us/articles/115000127413-New-Feature-Custom-Fields for more information.
2. Checklist Items – These contain text or links that provide information. These are not required but may be referenced over time, unlike completed Requirements. These are

primarily used to reference information contained in the CPC Resource Center (see "Focus Missions & CPC Resource Center Overview") but other information such as links to the ministry being visited may be added. During Trip Set up the administrator selects which items to use or can add custom ones to the trip when setting up.

3. Packet Types – Types of Team Member information a trip leader can download for review purposes or to maintain during the trip in the event of emergency.

J. <u>Trips - Trip Templates/Trip Requests</u>
Used if requests to set up new trips must be approved. Templates outline the type of trip it is. At this time, we do not use these.

K. <u>Trips - References</u>
This section is used to set up questions for references that are to be emailed from Focus Missions. At this time, we do not ask for references.

L. <u>Trips - Applications</u>
Used to set up or edit standard applications that can be used when setting up trips. In general, this application should be used for all trips but custom application questions may be substituted (with permission from CPC staff) when the trip is set up.

VI. Events
You can use to manage church events – probably won't use at this time.
https://support.focusministry.com/hc/en-us/articles/115003080368-Setting-Up-and-Managing-Your-Church-Events-Page

VII. Outreach Partners
This section provides information on church mission partners on a public landing page. This isn't used at this time. See https://support.focusministry.com/hc/en-us/articles/115003078428-New-Feature-Outreach-Partners.

Appendix A – Fundraising Pages

Focus Missions allows people to set up fundraising pages online to easily share with friends and family to solicit funds for your trip. A link to your personal page can be found on your Dashboard, along with buttons that allow you to link it to your social media.

Your fundraising page will be automatically set up with the trip image, place and dates and the wording "Sintaro can be part of this amazing trip through your support!" It will also have the departure and return dates under "More Info". The wording for the rest of the page is set up by you under Trip Story in your Trips page.

Section 1) Trip Overview – you may copy and paste from the trip "Details" page.

Section 2) Personal Reasons for Going/Appeal for funds – written by you.

Section 3) CPC Required Language which cannot be edited will appear at the end of your fundraising appeal. This notifies your donors that in order for these funds to be tax deductible, the donor must be notified that they CANNOT BE REFUNDED no matter the circumstance and provides a link to the CCB form to initiate payment.

> Should you choose to donate please note that all contributions for CPC short-term mission teams are tax deductible and nonrefundable. Due to IRS stipulations, you (the donor) are acknowledging that you are releasing control of how this contribution will be utilized for the team. However, if the team is successful in raising their financial goal, all excess funds will be applied to either the needs directly related to the ministry of this trip or to CPC scholarship funds. In the unlikely event that a trip is cancelled, funds raised by the team will help cover any cancellation costs for the trip. Any remaining funds will be donated to efforts in the country with the partnering ministry and/or to CPC scholarship funds.
>
> To contribute go to: https://cpcdanville.ccbchurch.com/goto/forms/607/responses/new