

Adding someone to the group:

When adding someone to a group, you should always check first to make sure they're not already in the group. Scroll through all participants or change your view to All Records.

To add a new group participant:

Subpage -> Participants tab -> "Add" button -> select the "... " -> search for the person's name -> select the record

Note: *Get in the habit of checking your selection in the bottom right corner. If you already have something selected, choose your "Current/Unsaved Selection" and clear it and then choose your new record to add in. -> Confirm Selection*

Group Role: Their role in the group. (**Ex:** Group Member) **Start Date:** The date they joined the group. (**Ex:** May 6, 2018) **End Date:** If you know their end date, go ahead and fill it out.

Leave everything else as "No" **Auto Promote:** No

Removing/End Dating someone from the group:

1. Subpage -> click the person's name
2. Click the Edit button
3. **End Date:** Add the date they stopped participating. (**Ex:** June 10, 2018)
4. Save
5. Subpage -> View: Past Participants

Note: *There's a difference between the Group End Date and the Participant's End Date within the group.*

Automatic End Dates:

(**Ex:** If a Childcare Group is only used to check attendance for a single event or for a season/semester, we'll add a Group End Date. That way, when the event is over, the Group is End Dated and will no longer show up in the Current Groups and Teams view

and the participants are End Dated and will no longer show up in the Current Participants view.)
If you are going to continue using a group, but the participants are going to change, just end date the participants, not the whole group. (**Ex:** FIT Groups. The FIT group for greeters will continue, but the participants in that group may fluctuate throughout the year.)