Creating Outreach Connections

You can assign outreach connections to individuals or outreach teams.

To assign an outreach connection to an individual

1. Point to **Directories**, then click **Locate Individual**.
2. In the **Last Name** field, enter the individual's last name.
3. In the **First Name/Goes-By Name** field, enter the individual's first name.
4. Click **Run Search**.
5. Click the individual whose information you want to view.
6. On the Individual Information page, click **Connections**.
7. Under **Connection Contact History**, click **Assign New Connection**.
8. Under **Select Type of Connection**, select **Outreach Connection** and click **Next.**
9. Select **Assign Individual**.
10. In the **Last Name** and **First Name** fields, enter the name of the individual to whom you want to assign the connection and click **Run Search.**
11. Click the name of the individual to whom you want to assign the connecton.
12. Enter information about the connection in the available fields. For more information, click **Help**.
13. Click **Next**. The summary of the connection displays.
14. Once you review the connection summary, click **Submit**.

To assign an outreach connection to an outreach team

1. Point to **Directories**, then click **Locate Individual**.
2. In the **Last Name** field, enter the individual's last name.
3. In the **First Name/Goes-By Name** field, enter the individual's first name.
4. Click **Run Search**.
5. Click the individual whose information you want to view.
6. On the Individual Information page, click **Connections**.
7. Under **Connection Contact History**, click **Assign New Connection**.
8. Under **Select Type of Connection**, select **Outreach Connection** and click **Next.**
9. Select **Assign Team**.
10. In the **Select A Team** drop-down list, select the outreach team to which you want to assign the connection and click **Run Search.**
11. Enter information about the connection in the available fields. For more information, click **Help**.

12. Click **Next**. The summary of the connection displays.
13. Once you review the connection summary, click **Submit**.

Entering Information about Completed Connections

Once you complete an outreach connection, you can enter information about the completed connection in Access ACS.

To enter outreach connection results

1. Point to **Directories**, then click **Connections**. The Outreach Connections page displays.
2. Click the name of the individual who must complete the connection.
3. In the list, click the outreach connection that you want to complete.
4. Under **Contact Results**, click on the calendar icon to select the date on which you completed the outreach connection. By default, the current date displays.
5. Under **Responses**, select a response and click **Move**. The response displays in the **Actual** pane. To select multiple responses, repeat this step.
6. If necessary, enter additional comments in the **Comments** text box.
7. Under **Results**, select one of the following options:
   - **Do not close – Not Completed** – Select to save the results without closing the connection.
   - **Close connection – Completed** – Select to save the results and close the connection.
8. Click **Submit**.