HandsOn Connect
VOLUNTEER Leader Manual

The Basics

Working Within the Organizational Portal

Various Tasks

Updated January 27, 2011

VOLUNTEER Lenawee! a program of the Lenawee Community Foundation
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Common Terms

Volunteer Portal – is the public website (http://volunteer.lenaweecf.org).

Organizational Portal – is the Salesforce (database) of HandsOn Connect. Users must be granted permission to access this side of the system.

Volunteer Opportunity – is something a volunteer might want to connect with. This can include service projects, trainings, socials, recognition events, etc.

Opportunity Types

> **Projects** – Traditionally, when one thinks about volunteering, he/she is talking about giving service to an organization, and we call these kind of opportunities PROJECTS.
>
> **Activities** – VOLUNTEER Lenawee! does more than just connect volunteers to service - we offer training, civic education, volunteer recognition, etc. We call these opportunities ACTIVITIES.

Occurrence – an occurrence is a time and date that an opportunity is scheduled for.

Connection – A connection is the relationship of one person to one occurrence. For Projects, it is a scheduled commitment that the volunteer has signed up for the project. That connection may either be verified as "attended" or "not attended."

Organization – there are two organizations to track for each opportunity: the organization that MANAGES the opportunity, and the organization that is SERVED by the opportunity.

Automated Emails from HandsOn Connect

To the Volunteer:

Opportunity Signup Confirmation - Confirmation email sent to a volunteer after signup.

Waitlisted Opportunity Now Open – E-mail sent to all waitlisted volunteers when an opportunity opens up again.

Volunteer Status Has Been Declined - Email sent to a volunteer when the connection status is changed. The mail will contain the decline Reason

Opportunity Reminder – Reminder sent to all volunteers who are signed up for date and time specific. Sent 4 days before the start date of the occurrence.

Post Opportunity Thank You - Thank you email to ask volunteer to report feedback. Sent 1 day after the occurrence end date to all volunteers signed up.

To the Team Leader:

Volunteer Leader Registration - Email sent to VOLUNTEER Leader with the details of login to customer portal.

Notification of volunteer signups - Every time a volunteer signups for your occurrence an email is sent to the VOLUNTEER Leader.

Notification of volunteer removals - Every time a volunteer is removed from your occurrence a mail is sent to the VOLUNTEER Leader.

Reminder to Report Attendance and Service Hours - Once an occurrence is past the end date mail should be sent to all VOLUNTEER Leaders to remind them to report hours.

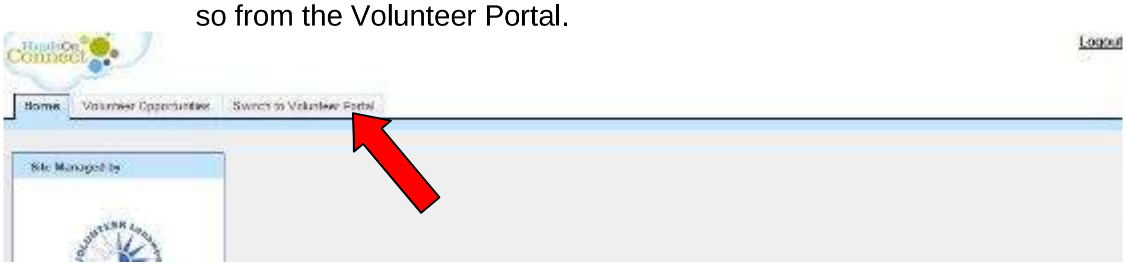
Logging In

1. From the VOLUNTEER Lenawee! homepage (http://volunteer.lenaweecf.org) click on the blue LOGIN button on the top right of your screen.

2. When prompted, enter your Username (email) and Password. Then click LOGIN.
   a. If you have forgotten your password, click on "Forgot password?" (just above the password box) to have your password reset via email.
3. Upon logging in, you will be automatically directed to the Organization Portal (administrative side of the website).

Switching from Organization Portal to Volunteer Portal

1. The Organization Portal has a variety of tabs listed horizontally along the top of the screen, directly under the HandsOn Connect logo. Click on the "Switch to Volunteer Portal" tab to be directed back to the main public homepage.
   a. Note: If you want to sign up for any volunteer projects or trainings, you must do so from the Volunteer Portal.



Switching from the Volunteer Portal to the Organizational Portal

1. If logged in, click on "Return to Organization Portal" at the top right of the screen.

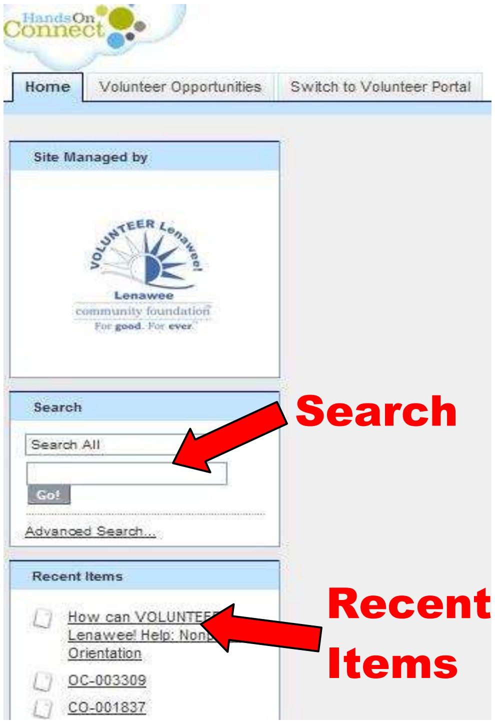
The Search Function

1. From the Organizational Portal, there is a text search box on the left side.
2. From "Search All" you can search Volunteer Opportunities, Organizations, Contacts, Tasks, Notes or Reports.
   a. You may narrow down your search by selecting a specific category from the drop down menu.

3. Search results will populate in the main screen.
4. Click on the name of the item you are searching for to open it.

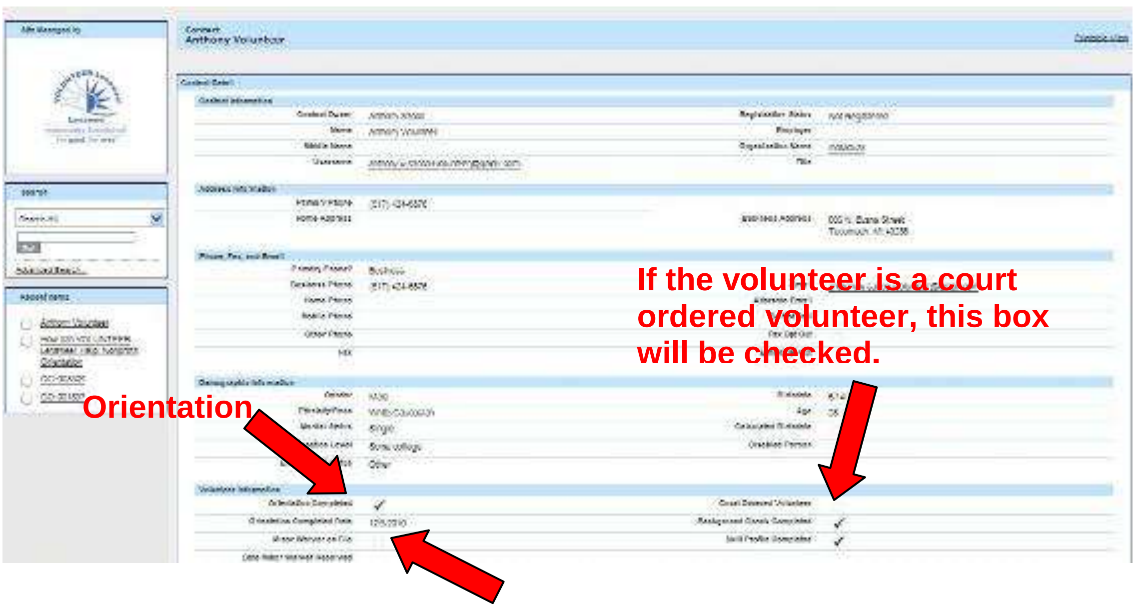
Your Recently Viewed Items

1. Items you have recently viewed will display on the left "Recent Items" menu box.
   a. Volunteer Opportunities will display with the opportunity name.
   b. Volunteer Occurrences will display as OC-######.



<u>Finding a contact to see if they are a Volunteer and/or have a youth waiver on file</u>

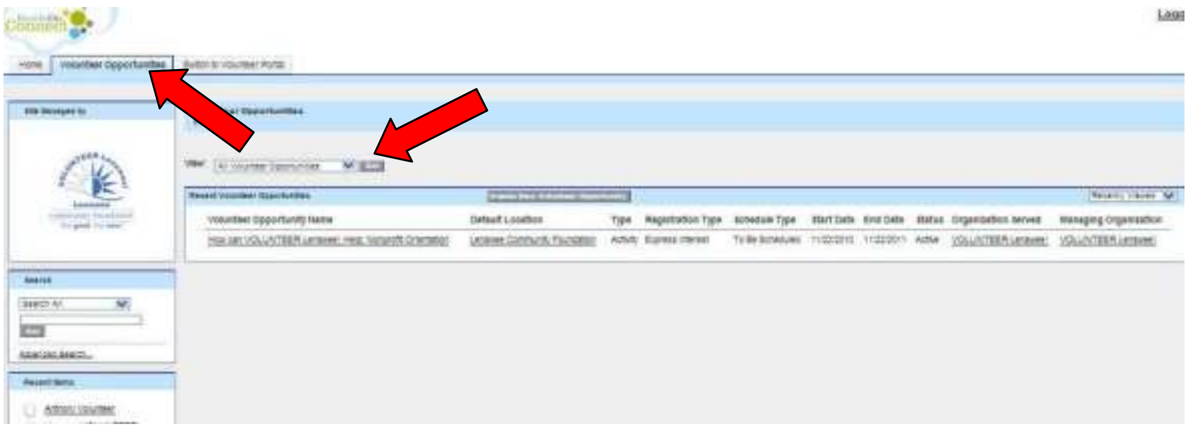
1. Within the Organizational Portal, enter the name of the volunteer in the search textbox and hit “Go!”
   a. Search results will populate in the main screen.
2. Click on the name of the individual.
   a. You can verify you have the correct person by comparing the email listed.
3. From the contact detail page, you are able to…
   - Check to see if the volunteer has participated in an orientation.
   - Check to see if the volunteer has a youth waiver on file. All youth under the age of 18 should have a youth waiver on file before volunteering.
   - Check to see if the volunteer has notified VOLUNTEER Lenawee! that they are a court ordered volunteer.



All volunteers under the age of 18 should have a youth waiver on file.

Finding your Volunteer Opportunity

4. From the Organizational Portal, click on the “Volunteer Opportunities” tab which will open Volunteer Opportunities Home.
    a. Your recently viewed Volunteer Opportunities will be displayed.
5. Select “All Volunteer Opportunities” from the view drop-down menu and then hit “Go!”
    a. This will generate a list of all Volunteer Opportunities (Projects) that you currently lead or projects you have led in the past.
    b. You will not be able to view Opportunities that you are not associated.



6. Click on the Volunteer Opportunity Name (Project Name) you would like to view.
    a. This will open the Volunteer Opportunity Overview page.
    b. The information displayed on the Volunteer Opportunity Overview is read-only. If you have a question or need something changed, contact VOLUNTEER Lenawee!

Note:

- The Volunteer Coordinator Information listed on the Opportunity is the managing organization contact for the Opportunity.

Finding your Volunteer Occurrence from the Volunteer Opporunity Overview Page

1. To view a specific time and date, you will need to open the Occurrence.
    a. Toward the bottom of the Volunteer Opportunity Overview Home, there is a box that lists upcoming and past Occurrences.

Occurrences

Action	Occurrence ID	Start Date & Time	End Date & Time	Status
Edit	OC-046157	11/30/2010 6:00 PM	11/30/2010 7:45 PM	Active

    b. Occurrences are distinguished by their start date & time.
2. Once you have located the Occurrence you wish to view, click on its Occurrence ID number (OC-######) to open the Occurrence Overview.

Adding Volunteers from the Volunteer Occurrence Page

**The easiest way for a volunteer to be added to a project is from the public site (Volunteer Portal). We highly recommend directing volunteers to the public site to sign up for a project instead of you, as the VOLUNTEER Leader, signing them up from the organizational portal. As volunteers sign up for your Volunteer Project (through the Volunteer Portal), they will show up within the Confirmed Connections area.

****Before** adding a volunteer to the volunteer occurrence, you need to make sure the volunteer meets the requirements of the project. Because you are adding them from the administrative side, the public registration restrictions do not apply.

1. From the Volunteer Occurrence Overview Home, scroll to the bottom and look for the connections area. Within connections, there are two boxes to work from (1) Pending/Declined Connections and (2) Confirmed Connections.
2. From the Pending/Declined Connections box, click on the New Connection button to open the New Connection Form.

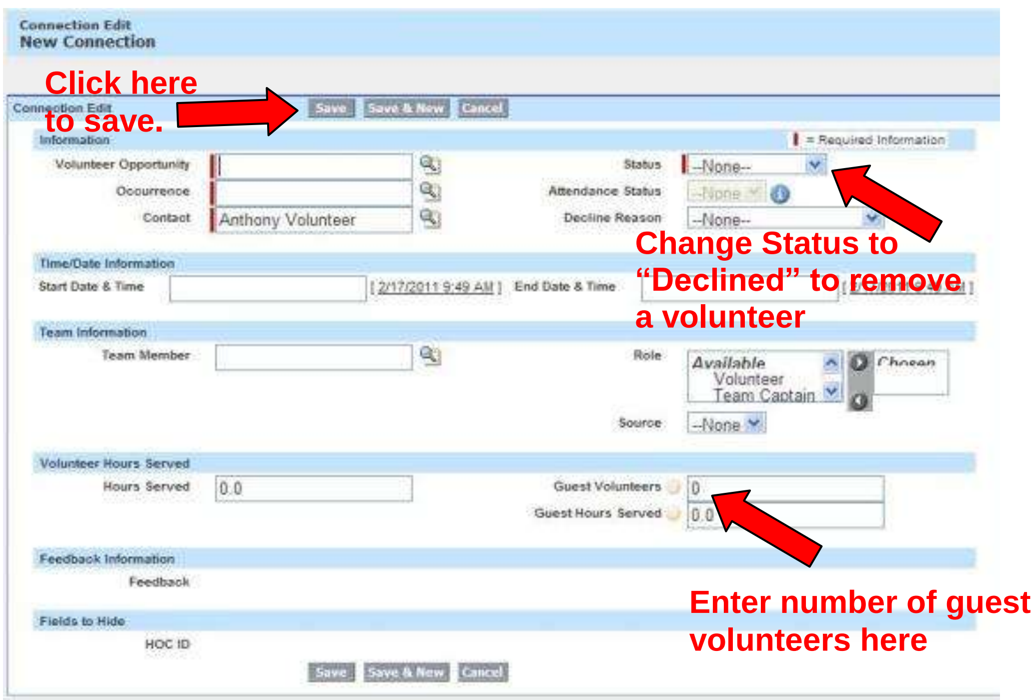
3. You need to LOOK UP AND SELECT the Volunteer Opportunity, Occurrence and Contact to make the connection.
    a. Start typing in the Project Name (or Contact Name) in the respective text box and then click on the small magnifying glass.
        i. You can use * as a wildcard next to other characters to improve your search results.
        ii. By clicking on the magnifying glass, a pop-up window will open with your search results.
        iii. Click on the underlined Project Name (or Contact Name) to make your selection.
    b. By immediately clicking on the magnifying glass, the LookUp pop-up window will open and display your Recently Viewed Volunteer Opportunities or Occurrences.
        i. Again, click on the underlined project name, occurrence ID or contact name to make the selection.
4. The final required step to make the connection is to select the Status.
    a. From the status dropdown menu, select “Confirmed.”

5. Hit “Save” to complete the connection.
    a. This will take you to the Connection Detail page. To go back to the occurrence, you can click on the Ocurrence ID in the Connection Detail information section or look for the most recent Occurrence ID in the Recent Items menu on the left of the screen.

Adding Guests of Volunteers to a Volunteer Occurrence

Guests of Volunteers may volunteer on occasion without creating their own profile. Provided that the guest(s) meet the project requirements and you have room for them at your project, you can manually add them to the project as a guest of the Volunteer.

1. From the Volunteer Occurrence Overview, scroll to the bottom and look for the connection of the volunteer looking to bring a guest.
2. Click on the Connection ID (CO-######) next to the volunteer you will be adding the guest on to.
3. Click on the "Edit" button at the top of the Connection Detail box.
4. On the right middle of the Connection Edit screen, enter the number of Guest Volunteers you would like to add.
    a. Do not edit the Hours Served or Guest Hours served. These fields will automatically populate once the attendance is verified.
5. When done, hit "Save" to go back to the Connection Detail.



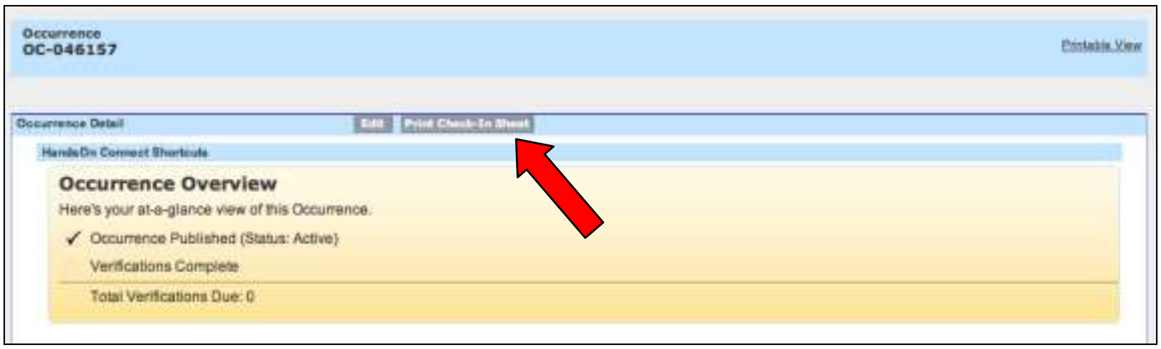
Removing a Volunteer

1. From the Volunteer Occurrence Overview Home, scroll to the bottom and look for the connection of the volunteer looking to bring a guest.
2. Click on the Connection ID number (CO-######) next to the volunteer you want to remove.
3. Click on the "Edit" button at the top of the Connection Detail box.
4. On the top right of the Connection Edit screen, change the status to Declined.
5. Hit "Save" to go back to the Connection Detail.
6. The declined volunteer will now show up in the Pending/Declined Connection box.

Printing the Volunteer Check-In Form

**In addition to printing the Volunteer Check-In Seet, make sure you print out the Volunteer Release and Waiver. Every volunteer will need to sign on both forms (the check-in form and volunteer project waiver). This is currently a workaround for a known bug in HandsOn Connect.

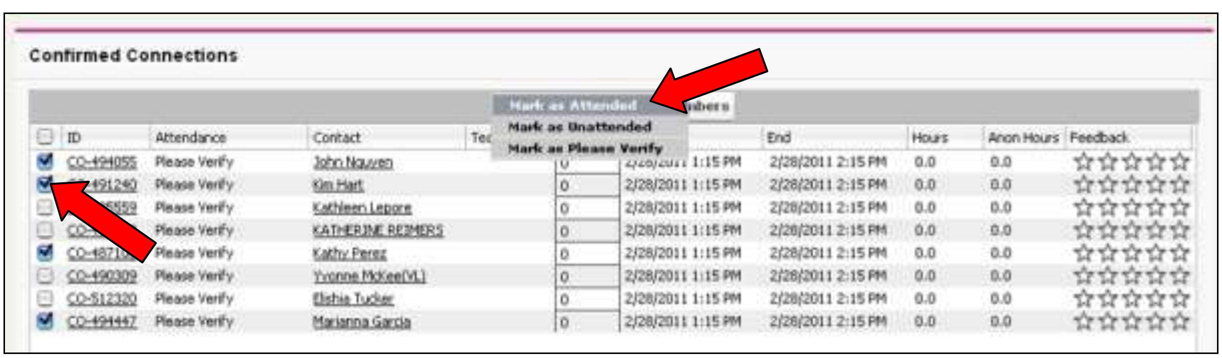
1. From the Occurrence Overview home, click on the “Print Check-In Sheet” button that is located at the top and bottom of the Occurrence Detail box.
    a. A new window with a PDF file of the Volunteer Check-In will open.
    b. VOLUNTEER Lenawee!’s volunteer release and waiver is part of the check-in document.



2. To print, hold down the CTRL and the letter P on your keyboard, or select File, Print.
    a. You may need Adobe Acrobat Reader to download this file. If you do not already have it, it can be downloaded free of charge from www.adobe.com.

Recording Attendance and Hours

1. From the Volunteer Occurrence Overview page, scroll down to the Confirmed Connections area.
2. Mark the box to the left of the Connection ID of the volunteers who attended the project.
    a. Then click on “Mass Action” and click on “Mark as Attended.”
3. Mark the box to the left of the Connection ID of the volunteers who did NOT attend the project.
    a. Then click on the “Mass Action” and click on “Mark as Unattended”



Recording Project Impact

1. From the Volunteer Occurrence Overview page, click “Edit”.
2. In the Impact Measurements area (bottom of screen), record the impact measurement.
    a. You may be asked to capture up to three different impact measurements.
    b. Each impact measurement can have three descriptors
        i. Clients or Facilities Served
            1. Example: adults, animals, parks, schools, gardens
        ii. Service Activity Performed
            1. Example: adopted, fed, mentored, tutored, sorted
        iii. Focus Area for Impact
            1. Example: military, ppl with disabilities, teens, substance abuse

    EX: Enter number of seniors fed
    Enter number youth tutored ages 5-13
    Enter number of youth tutored that are teens
3. Hit “Save”.