Managing Volunteers

The **Volunteer** workspace is used to manage the volunteers who enter your building and the volunteer application process. This section includes the following topics:

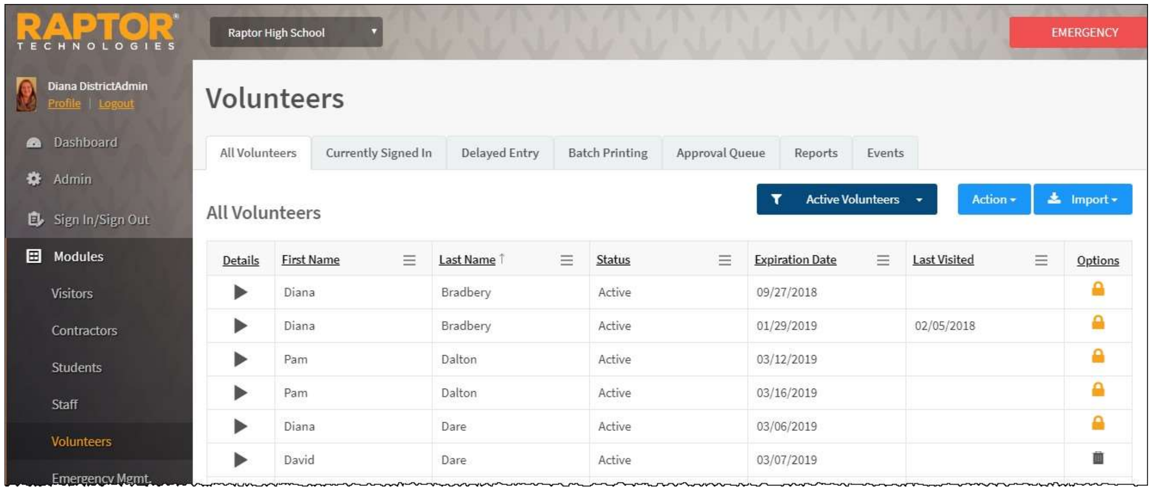
Volunteer Dashboard

The Volunteer Dashboard displays on the home screen upon user sign in. It provides a graphical view of up-to-date information on volunteer activity. Users with the *Can Run Volunteer Reports* permission can view the Volunteer Dashboard.

- **Active Volunteers** – Displays the number of volunteers currently signed in, total hours for the week, and total hours for the month.
- **Volunteer Applications** – Displays the number of new or renewed volunteer applications that have been submitted for the current week, the number of applications pending approval, and the number of applications that have been approved for the current week.

Volunteers Workspace

You can manage volunteers using the **Volunteers** workspace. Select **Modules > Volunteers** in the navigation menu and then click the tab in the **Volunteers** workspace for the tasks you want to perform.



Administrators with the *Can Manage Volunteers* permission can use the **All Volunteers** tab to:

- Filter to view Active, Inactive or All volunteers
- View, edit and delete volunteers
- Create an application for a volunteer
- Email all volunteers
- Deactivate and activate all volunteers
- Reset volunteer hours
- Import approved volunteers and applications (Can Import Volunteers permission)

RAPTOR TECHNOLOGIES

View and Modify Volunteer Details

Filter Volunteers

You can filter which volunteers display on the **All Volunteers** workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. In the **Filter** drop-down list on the **All Volunteers** workspace, select **Active Volunteers**, **Inactive Volunteers** or **All Volunteers** to specify which volunteers display in the workspace.

View or Modify Volunteer Details

Perform the following steps to view or modify the details about a specific volunteer.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click the h icon next to the volunteer's name to expand the **Volunteer Detail** workspa

   Note: The i icon in the **Options** column indicates the record can only be modified at the client level (All Buildings).
3. If you want to modify the volunteer record, click **Edit** (asterisk * indicates a required field).
4. Click **Save** to update the record.

Delete Volunteer

On the **All Volunteers** workspace, click the m icon in the **Options** column and then click **OK** to confirm the deletion.

View Application History/Hours Logged

Application History

At the client level (All Buildings), the **Application History** grid on the **Volunteer Detail** workspace displays a log of all applications submitted by the volunteer. By default, the submission date, application status, approval date, and who approved the application displays.

To view the details for a specific application, click the h icon in the **Details** column.

Application History

Details	Submit Date	Application Status	Approval Date	Approved By
▶	08/07/2016	Approved	08/07/2016	Devin DistrictAdmin

1 | 10 items per page | 1 - 1 of 1 items

Hours Logged

The **Hours Logged** grid on the **Volunteer Detail** workspace displays each function the volunteer has signed in for, the sign-in date and time, the sign-out date and time, and the total hours volunteered. It also includes the sign-in events and hours logged by the volunteer in the Volunteer Portal.

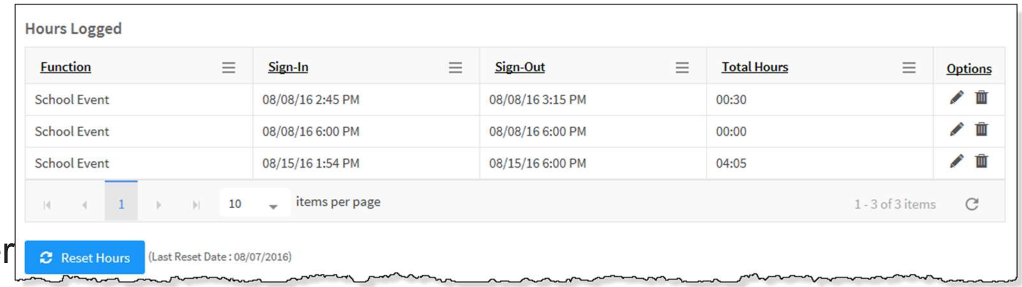
Administrators with the *Can Manage Volunteers* permission can edit the function, sign-in or sign-out date/time or delete an entry. Any of these actions will not alter the Sign In/Sign Out History.

Note: A sign-out date/time must be present to edit an entry.

Click **Reset Hours** to clear the tracked hours and reset the count to zero.

Notes:

- You can also reset volunteer hours at the building or district level.
- Resetting a volunteer's hours at any level will reset the hours across all buildings for that volunteer.



Hours Logged

Function	Sign-In	Sign-Out	Total Hours	Options
School Event	08/08/16 2:45 PM	08/08/16 3:15 PM	00:30	
School Event	08/08/16 6:00 PM	08/08/16 6:00 PM	00:00	
School Event	08/15/16 1:54 PM	08/15/16 6:00 PM	04:05	

1 | 10 items per page | 1 - 3 of 3 items

Reset Hours (Last Reset Date : 08/07/2016)

View Sign-In/Out History

The **Sign-In/Out History** grid on the **Volunteer Detail** workspace displays a log of sign in and sign out events for the selected volunteer.

By default, the Date/Time, Event Type, Building Name and Destination columns display. From the column menu, you can also choose to display the Event Method column.

Sign-In/Out History

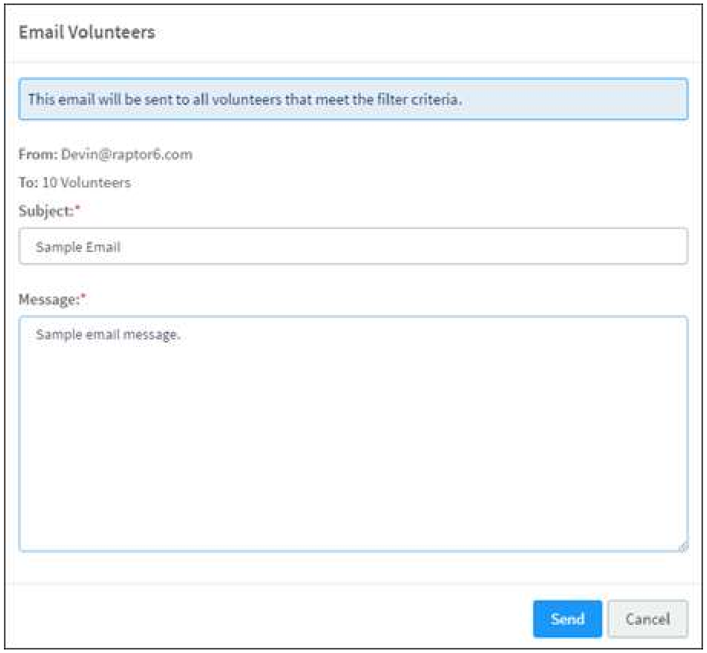
Date Time ↓	Event Type	Event Method	Building Name	Function
05/09/16 4:32 PM	Sign In	Operator Assisted	Raptor High School	School Event
04/27/16 12:12 PM	Sign Out	Operator Assisted	Raptor High School	School Event
04/27/16 11:06 AM	Sign In	Operator Assisted	Raptor High School	School Event

Email All Volunteers

Volunteer Coordinators can send an email to all or a portion of the volunteers from the **All Volunteers** workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, filter to display the volunteers you want to email. For example, select **All Buildings** and **Active Volunteers**.
3. Click **Action > Email All**.

   A dialog box displays confirming the volunteers based on the selected filters.
4. Click **Proceed** on the confirmation dialog or click **Filter List Further** to return to the **All Volunteers** grid to change your filtered list.
5. Enter the email **Subject** and **Message**, and then click **Send**.



Show/Hide Functions

Volunteer Coordinators can filter the **All Volunteers** data grid to show those volunteers who are approved for a function. This filtered list can then be used to email those volunteers for events that require those functions.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click **Action** and select **Show/Hide Functions** to display the **Functions** column along with each function that the volunteers have been approved to participate.
3. Click the column **Filter** option to show only those volunteers who have the specific function associated with their profile.

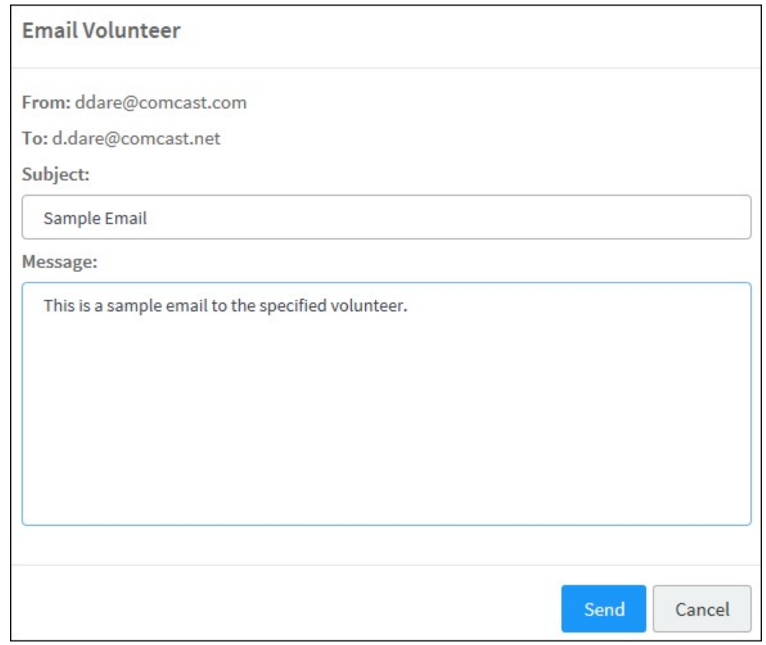
   The volunteers that meet this filtered function criteria display in the **All Volunteers** grid. You can now email these volunteers for a specific event that requires this function.

Email Volunteer—Detail Workspace

Volunteer Coordinators can send an email to a specific volunteer from the Volunteer Detail workspace.

1. From the navigation menu, select **Modules > Volunteers**.
2. On the **All Volunteers** workspace, click the h icon next to the volunteer's name to expand the **Volunteer Detail**.
3. Click **Send Email**.
4. Enter the email **Subject** and **Message**, and then click **Send**.

Note: The **To** field (email recipient) will not be populated if the **Email** field in the **Volunteer Profile** does not contain a value.



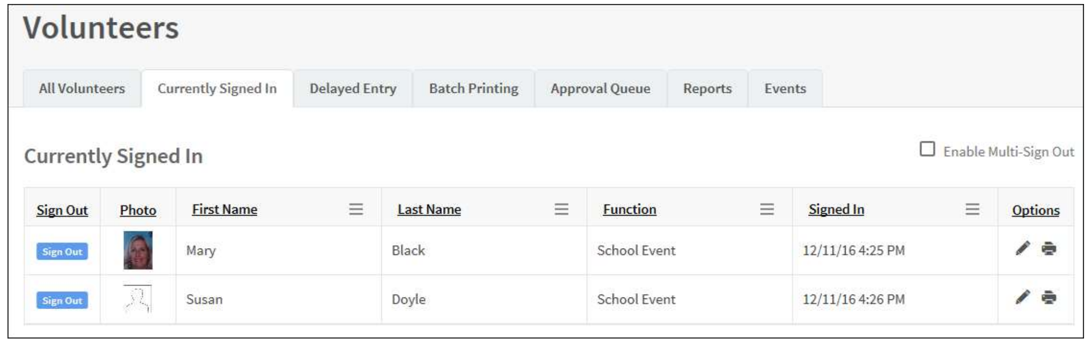
Currently Signed In Volunteers

Use the **Currently Signed In** tab to view all volunteers who are currently signed in. You can also perform the following tasks from this tab.

View Sign-In Information

View the volunteers who are currently signed in, the sign in date and time, and their function.

You can hover the cursor over the photo in the data grid to view an enlarged photo.



Print or Reprint Badge

If a volunteer has lost their badge or changed their destination, or the printer has malfunctioned, you can reprint their badge. In the **Options** column, click the z icon to print or reprint the badge.

Sign Out Volunteers

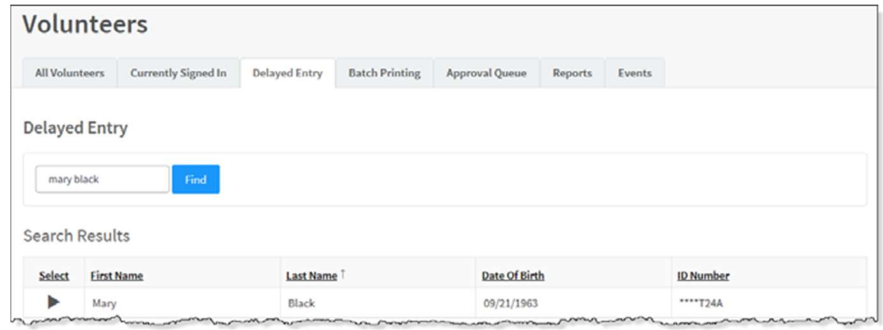
You can sign out a single volunteer or multiple volunteers:

- To sign out a single volunteer, click **Sign Out** next to their name.
- To sign out multiple volunteers, select the **Enable Multi-Sign-Out** check box in the upper right corner, select the check box next to all the volunteers to be signed out, and then click **Sign Out**.

  To return to single sign-out mode, clear the **Enable Multi-Sign-Out** check box.

Delayed Sign In and Sign Out

If you are unable to sign in or sign out volunteers due to equipment issues or internet connection issues, you can use the Delayed Entry feature to manually enter the sign-in and sign-out date and time. This feature allows users with the *Can Sign In Volunteers* permission to record the actual sign-in or sign-out times but the entry is delayed until the system is available. *This feature is not visible at the All Building level.*



1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Volunteers** and click the **Delayed Entry** tab.
3. Enter the **First Name** or **Last Name** and click.
4. Select the person from the search results and complete the following information:
   - **Sign-In Date/Time*** – Select the date and time that the person actually signed in.
   - **Sign-Out Date/Time** – Select the date and time that the person actually signed out.

     Note: The Sign-In Date and Sign-Out Date must be the same date.
   - **Function*** – From the drop-down list, select the reason the volunteer is signing in.
   - **Organization** – Select the organization associated with the volunteer.
5. Click **Submit**. A *Delayed Entry Successful* message displays in the lower right corner of the screen.

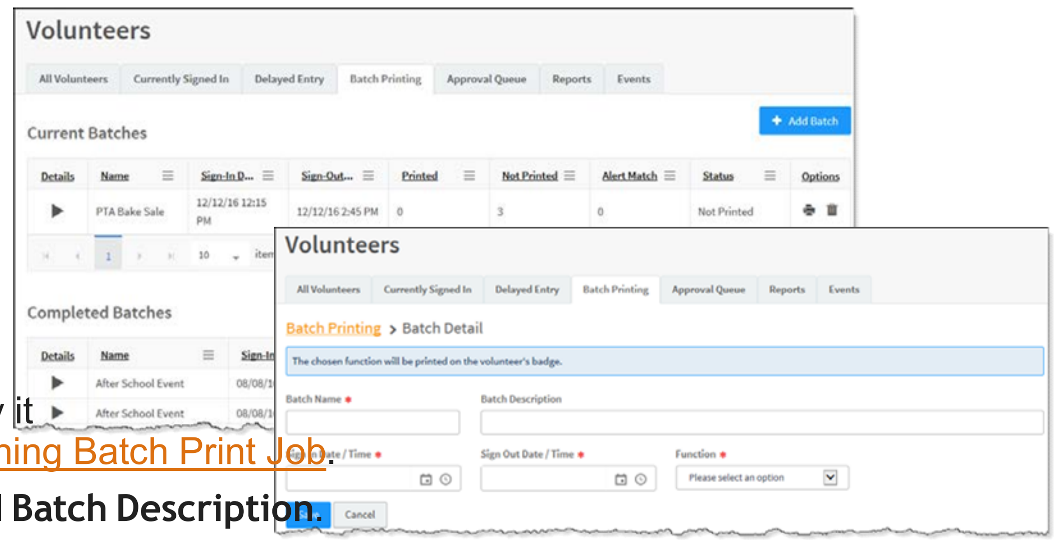
Batch Printing

The Batch Printing feature enables users to run a batch of volunteers through the sex offender and custom alert checks, and then print their badges in advance of a school event where many people are expected to sign in for the same event at the same time.

Using this feature speeds up the sign in process for an event and helps prevent a long line of people at the Front Desk. When the volunteers arrive, you simply look at their ID and hand them their badge.

While running the batch, if one or more volunteers are flagged with an offender or custom alert, the user can view the alerts and decide if the person is a match. If they are a match, no badge is created and they will not be signed in at the time designated in the Batch Detail.

Add Batch Print Job



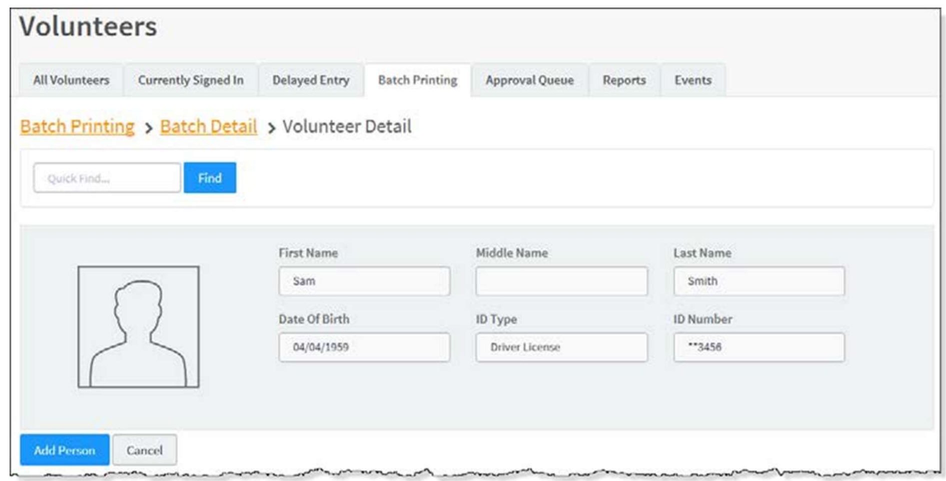
1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Volunteers** and click the **Batch Printing** tab.
3. Click **Add Batch**. You can also copy a **Completed Batch** job and modify it to create a new batch job. See Cloning Batch Print Job.
4. Enter the **Batch Name*** and optional **Batch Description**.
5. Select the **Sign-In Date/Time*** and **Sign-Out Date/Time***. *The **Sign-In Date** and **Sign-Out Date** must be the same date.*
6. Select the **Function*** and click **Save**.

Batch Printing, cont.

8. In the **Volunteer List** area, click **Add Volunteer**.

Note: You can only add volunteers to the batch if they have previously signed in and have an official record in the Raptor system.

9. Enter the volunteer's name and click **Find**.
10. In the search results, click **Select** next to the volunteer's name.
11. On the **Volunteer Detail** workspace, click **Add Person**.
12. Repeat Step 8 and Step 11 for all volunteers to be added to the batch.



RAPTOR TECHNOLOGIES

Execute Batch Printing

You can execute and print the batch from either the **Batch Printing** workspace or the **Batch Detail** workspace.

1. Use one of the following methods to execute and print the batch:
   - From the **Current Batches** grid on the **Batch Printing** workspace, click the icon in the **Options** column.
   - From the **Volunteers List** grid on the **Batch Print Details** workspace, click **Print Batch Now**.
2. On the **Print Confirmation** dialog, click **Continue**.

3. If a Possible Offender alert displays for any volunteer, review the information and determine if it is a match. See Possible Offender and Custom Alerts.

   If the volunteer is a match to an offender or custom alert, the badge will not be printed and the **Volunteer Excluded From Batch Print** dialog displays.

4. Click **Close** to continue.

   When all the badges have printed, the number of printed badges printed displays on the **Batch printing is complete** dialog.

5. Click **Close** to complete the procedure.

Volunteers will automatically be signed in and signed out on the date and time specified in the Batch Print job.

Note: A batch print is not complete until both the sign-in and sign-out times have elapsed. Up until the sign-out time has elapsed, the batch print is still considered active and can be modified. Once the sign-out time has elapsed, the batch print is considered complete and will be moved to the **Completed Batches** grid.

Cloning Batch Print Job

The Clone Batch feature enables you to copy a **Completed Batch** job and modify it to create a new batch job. Perform the following procedure to clone a batch print job:

1. Select the school from the Building Selector (you must select a specific building).
2. From the navigation menu, select **Modules > Volunteers** and then click the **Batch Printing** tab.
3. In the **Completed Batches** grid, click **Clone** in the **Options** column for the batch job you want to copy.

Completed Batches

Details	Name	Sign-In Date/Time	Sign-Out Date/Time	Volunteer Count	Status	Options
▶	After School Event	08/08/16 3:15 PM	08/08/16 3:15 PM	3	Completed	Clone
▶	Bake Sale	08/08/16 2:45 PM	08/08/16 5:30 PM	3	Completed	Clone

4. On the **Batch Detail** workspace, enter the **Batch Name*** and optional **Batch Description**.
5. Select the **Sign-In Date/Time*** and **Sign-Out Date/Time***. *The **Sign-In Date** and **Sign-Out Date** must be the same date.*
6. Select the **Function*** and click **Save**.

View Application Status

Users with the *Can Approve Volunteers* permission can view the status of a volunteer's application as it goes through the approval process. This allows the volunteer coordinator to view the current state and take the necessary action.

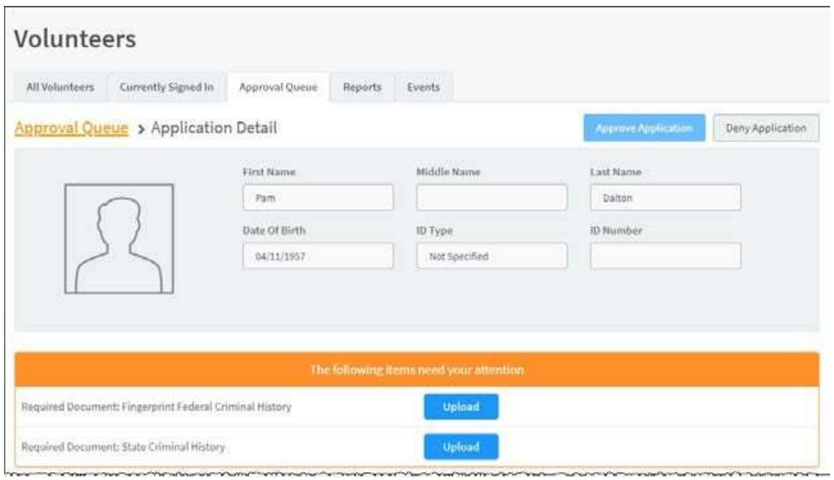
1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.
2. In the **Approval Queue** grid, view the current state of the application in the **Status** column. The following statuses are available:

   - **Processing** – The Raptor System is processing the application and no action can be taken until the processing is complete.
   - **Action Required: Review Alert(s)** – This informs the Volunteer Coordinator that the applicant has one or more possible sex offender alerts; they need to review the alerts to determine if they are a match to the applicant.
   - **Action Required: Review Background Check** – This informs the Volunteer Coordinator that a criminal record has been returned and they need to review it.
   - **Action Required: Application on Hold** – This status is only associated with the Texas DPS; it displays when the Volunteer Coordinator has put the application on hold until more information can be obtained to approve the application.
   - **Action Required: Complete Requirement(s)** – This status indicates that one or more requirements and/or required documents need to be reviewed and marked as complete before moving the application further through the process.
   - **Action Required: Application Approval** – This status informs the Volunteer Coordinator that the application is ready for final approval.
   - **Approved: Awaiting Expiration** – No action required from the Volunteer Coordinator. When the volunteer's current term expires, this new application will be applied to the volunteer's profile.

View Application Details

You can access and view the details of an application in the **Approval Queue** grid on the **Approval Queue** workspace.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Approval Queue** tab.
2. In the **Approval Queue** grid, click the h icon in the **Details** column for the application.



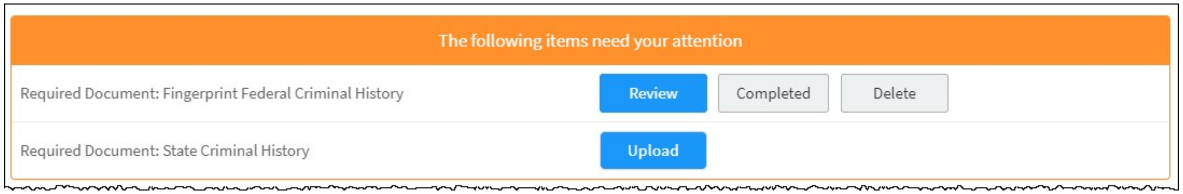
If the application requires attention prior to approval, the items that need to be addressed are displayed under the call to action banner.

For example, if an applicant must provide required documents for a function specified in their application, these items will be listed in this area. Also, if a possible offender alert has been triggered, you can review the alert here prior to approving the applicant. See Possible Offender Alert for Volunteer Applicant.

In addition, if there are requirements associated with functions where an applicant has selected these functions, the requirements must be satisfied and marked as complete before you can complete the approval process.

View Application Details, cont.

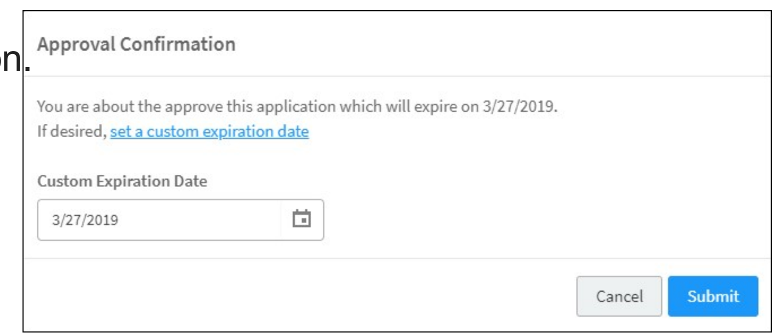
3. On the **Application Detail** workspace, if documentation is required prior to approval, click **Upload** and navigate to the document.



4. Once the document is uploaded, click **Review** to verify that everything is accurate, and then click **Completed** to indicate the requirement has been satisfied.

   If you want to remove the document to replace it with another uploaded document, click **Delete**.

5. On the **Document Completed Confirmation** dialog, click **Continue**. The item is removed from the list.
6. After all items have been addressed, the call to action banner displays the message *Final application approval is required*.
7. Click **Approve Application**.
8. On the **Approval Confirmation** dialog, if you want to specify a custom expiration date, click the link and select the date from the calendar.
9. Click **Submit** to approve the application.



View Application History Log

The **History Log** grid on the **Application Detail** workspace displays the date/time of activity related to the volunteer application process. The History Log includes the date and time of the activity, the activity description and the name of the user performing the activity. Some activities that display in this log include:

History Log

Timestamp	Activity	Performed By
12/16/16 5:28 PM	Application Submitted Online	Auto Process
12/16/16 5:28 PM	Background Check Submitted - WPS-1823853	Auto Process
12/16/16 5:28 PM	No Alerts	Auto Process
12/16/16 5:28 PM	Awaiting Background Check Results	Auto Process

- Application Submitted Online
- Background Check Submitted
- Alerts Ready for Review – Indicates there are possible sex offender alerts ready to be reviewed by a user with the *Can Approve Volunteers* permission.
- No Alerts – Indicates there are no possible sex offender alerts associated with the volunteer applicant.
- Awaiting Background Check Results – Indicates the background check is in progress and results have not yet been returned.
- Background Check Results Ready for Review – Indicates the background check has been returned but needs reviewed.
- Background Check Reviewed – Indicates the background check has been reviewed.
- Background Check Results – No Criminal Record – Indicates the background check returned no criminal record for the volunteer applicant.
- Requirement <name of requirement> Complete
- Application Approved

View Required Documents

The **Required Documents** grid on the **Application Detail** workspace displays the required documents for volunteer applicants, the upload timestamp, status, the user who performed the upload and an option to preview the document.

To preview the document, click the 6 icon in the **Options** column.

Required Documents

Name	Upload Timestamp	Status	Performed By	Options
Fingerprint Federal Criminal History	03/12/18 11:03 AM	Completed	Diana DistrictAdmin	
State Criminal History	03/12/18 11:11 AM	Completed	Diana DistrictAdmin	

Note: After an application has been approved or denied, the uploaded documents are still accessible from the application.

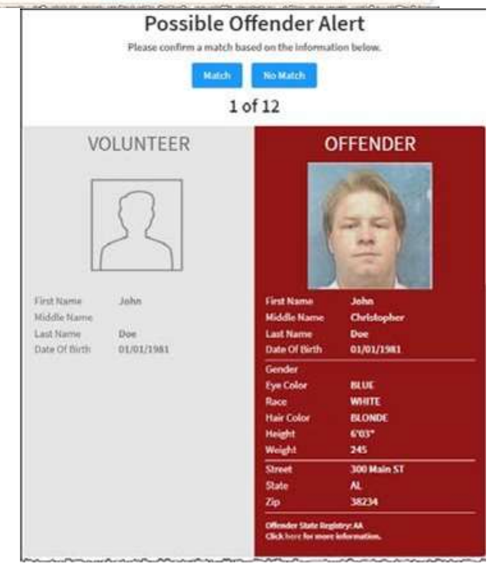
Possible Offender Alert for Applicant

If a Possible Offender Alert is generated from a volunteer applicant, the volunteer coordinator will be prompted to review the information before approving the applicant. The Offender Check for volunteer applications feature must be enabled by Raptor.

1. On the **Application Detail** workspace, click **Review**.
2. On the Possible Offender Alert dialog, analyze the search results. Because there can be multiple possible matches, it is very important that you carefully compare the information displayed on the screen for Volunteer and the Offender information.

   It is recommended that you compare the address to verify a match. Not all states provide offender photos and details.

   Note: Raptor also matches on offender alias names. If this occurs, an Alias Match message displays below the offender's photo.
3. Click **Match** or **No Match**.
   - If **Match**, click **Yes** to confirm or click **Cancel**.
   - If **No Match** and there are multiple records, the next possible match displays on screen.



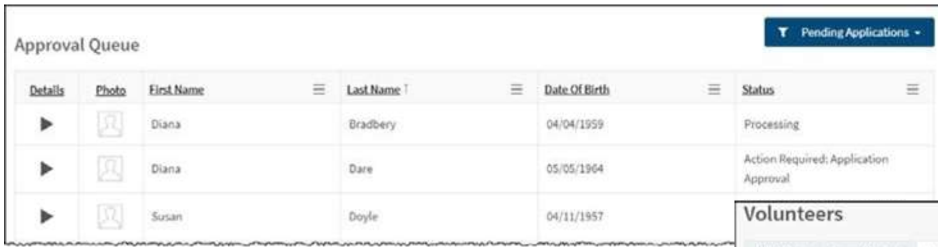
The number of matches and the number of total Possible Offender Alerts are recorded in the **History Log** on the Volunteer Application, which will force the application to be manually approved (if the **Automatically Approve When Requirements Satisfied** feature is set to **Yes** on the **Volunteer Application Settings** workspace).

After the applicant has been reviewed, the volunteer coordinator can approve or deny the application. See Manually Approve Application.

Manually Approve Application

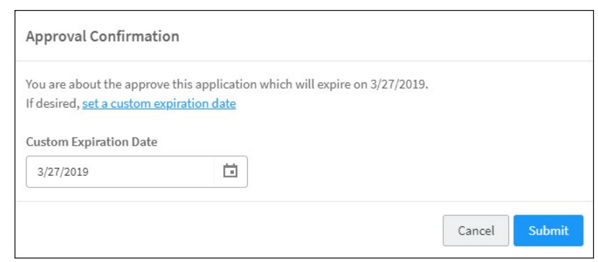
Volunteer Coordinators can manually approve or deny a volunteer application from the Approval Queue.

1. In the **Approval Queue** grid, select **Pending Applications** from the **Filter** drop-down list.



2. In the Details column, click the h icon for the volunteer applicant.
3. On the **Application Detail** workspace, click **Approve Application** or **Deny Application**.
   - If you click **Approve Application**, the **Approval Confirmation** dialog displays. Click **Submit** to approve the application or **Cancel** to cancel the action.

     If you want to specify a custom expiration date, click the link and select the date from the calendar.
   - If you click **Deny Application**, the **Reason for denial** dialog displays. Enter the reason why the application has been denied and then click **Continue**. If you want to cancel your action, click **Cancel**.



Manually Approve Application, cont.

If the Volunteer Portal is enabled, a user account will be automatically created for the Volunteer Portal and an email with instructions on how to log in is sent to the volunteer applicant.

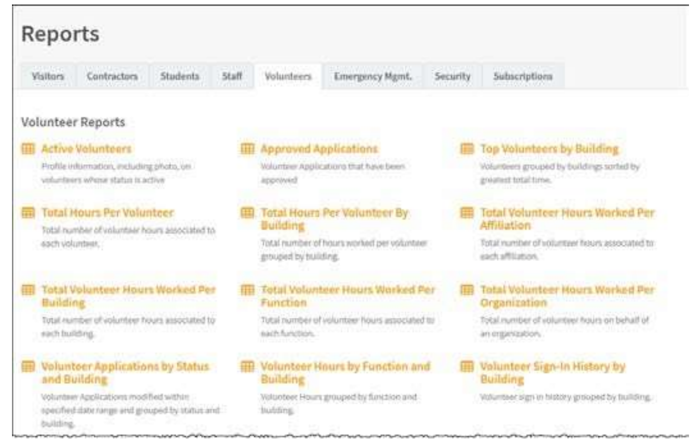
If the automated process is unable to create a Volunteer Portal user account, the volunteer coordinator can manually create a user account for the Volunteer Portal. See Create Volunteer Portal User Account.

Notes:

- For active volunteers that have submitted new applications that have been approved, the volunteer's profile will not be updated with the information on the new application until their expiration date, at which time their volunteer profile will be replaced with information from the newly approved application.
- Applicants with possible sex offender alerts, a returned criminal record, or under age 18 will require manual approval even if the *Automatically Approve When Requirements Satisfied* setting is enabled.

Volunteer Reports

Use the **Reports** tab to run reports for volunteer activity. The following Volunteer reports are available:



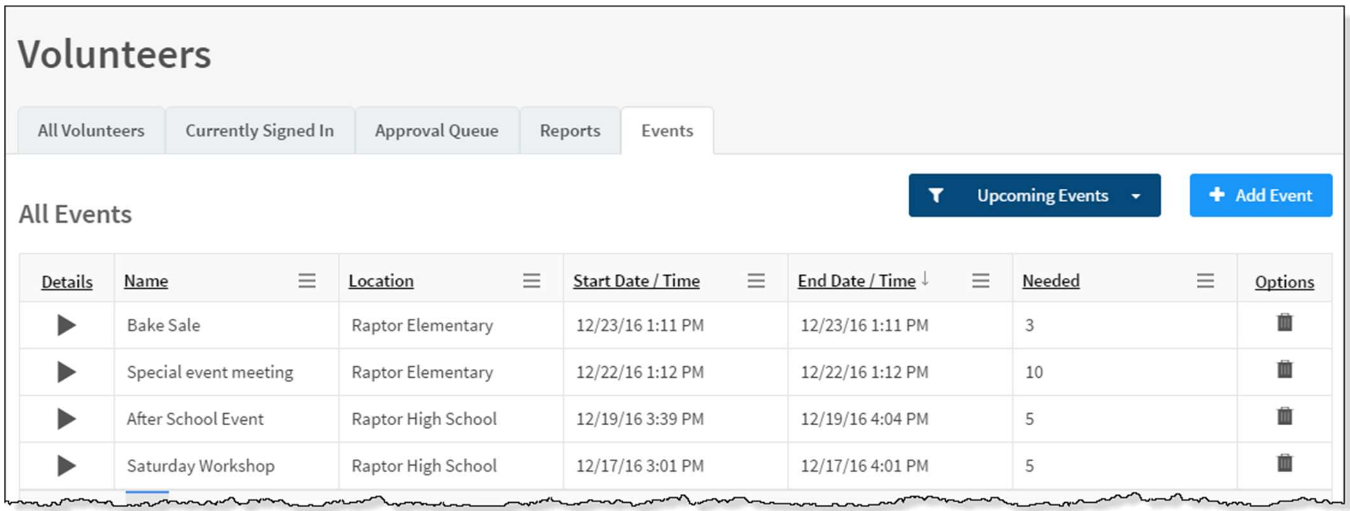
- **Active Volunteers** – Profile information for volunteers with active status, including photo.
- **Approved Applications** – Volunteers that have gone through the approval process.
- **Top Volunteers by Building** – Volunteers grouped by buildings and sorted by greatest total time.
- **Total Hours Per Volunteer** – Total number of volunteer hours associated to each volunteer.
- **Total Hours Per Volunteer By Building** – Total number of hours worked per volunteer grouped by building.
- **Total Volunteer Hours Worked Per Affiliation** – Total number of volunteer hours associated to each affiliation.
- **Total Volunteer Hours Worked Per Building** – Total number of volunteer hours associated to each building.
- **Total Volunteer Hours Worked Per Function** – Total number of volunteer hours associated to each function.
- **Total Volunteer Hours Worked Per Organization** – Total number of volunteer hours on behalf of an organization.
- **Volunteer Applications by Status and Building** – Volunteer applications modified within specified date range and grouped by status and building.
- **Volunteer Hours by Function and Building** – Volunteer hours grouped by function and building.
- **Volunteer Sign-In History by Building** – Volunteer sign in history grouped by building.

See Running Reports for more information.

Volunteer Events

The **Events** tab is used by the Volunteer Coordinator to manage events, such as creating an event, viewing all events, modifying an event and deleting an event. You must have the *Can Manage Events* permission to see this tab.

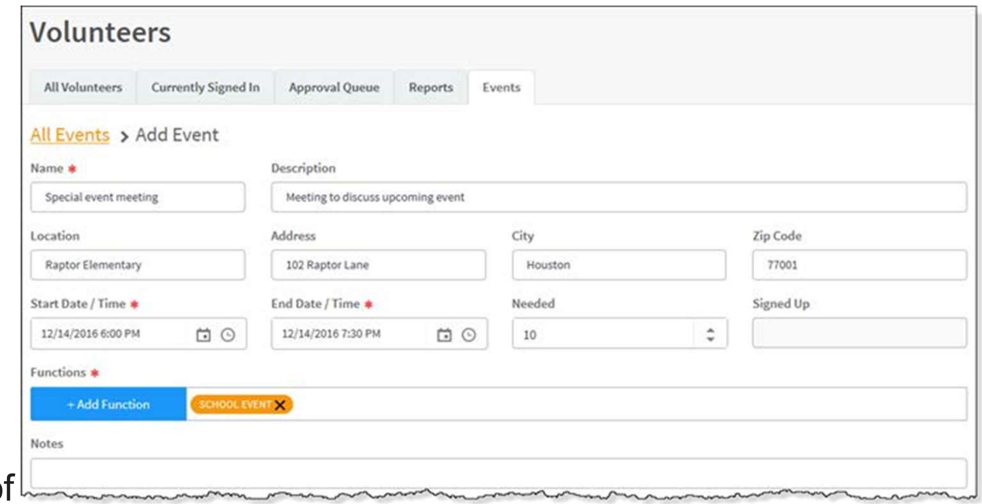
You can view all the events on the **All Event** workspace. Use the **Filter** drop-down to narrow the search for specific events. You can filter to display Scheduled Events, Past Events and All Events.



Add Volunteer Events

Volunteer events can be created at the building level or client level (All Buildings).

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click **Add Event** and complete the following:
   - **Name***
   - **Description**
   - **Location**
   - **Address**
   - **City/Zip Code**
   - **Start Date/Time*** – Select the date and time the event starts.
   - **End Date/Time*** – Select the date and time the event ends.
   - **Needed** – Select the number of volunteers needed to help with the event.
   - **Signed Up** – *Read-only*. Indicates the number of volunteers who have already signed up for the event.
   - **Functions*** – Click **Add Function** and select the type of event from the drop-down list.
   - **Notes** – Enter any additional notes about the event.
3. Click **Save**.

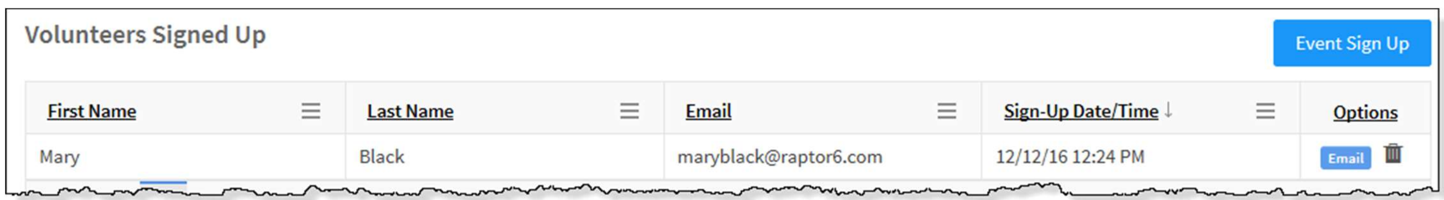


View Volunteers Signed Up for Event

Volunteer Coordinators can view who has signed up to volunteer for an event from the **Event Detail** workspace.

Note: You must have the Raptor Volunteer Management System enabled to see this feature.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the h icon next the event you want view.
3. On the **Event Detail** workspace, you can view the number of volunteers who have signed up for the event in the **Signed Up** field in the upper portion of the workspace.
4. Navigate to the **Volunteers Signed Up** grid to view the volunteers who have signed up for the event.


Volunteers Signed Up

Event Sign Up

First Name	Last Name	Email	Sign-Up Date/Time	Options
Mary	Black	maryblack@raptor6.com	12/12/16 12:24 PM	Email

Remove Volunteers Signed Up for Event

To remove a volunteer who has signed up for an event and reset the **Signed Up** number to reflect the change:

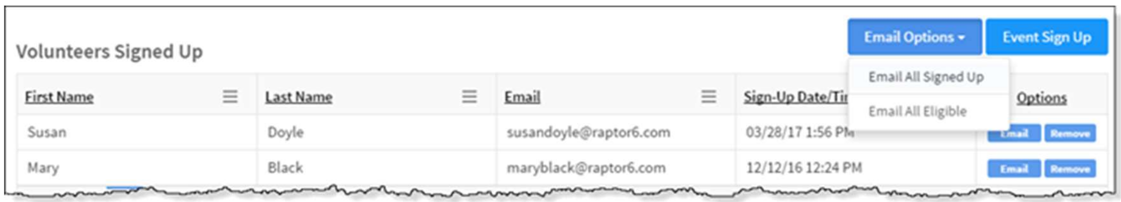
1. Click **Remove** in the **Options** column and then click **Yes** on the **Removal Confirmation** dialog.
2. On the **Email Removed Volunteer** dialog, complete the **Message** and click **Send**.

If the volunteer does not have an email address in their profile, the **To** field displays null. Click **Cancel** to cancel the email.

Send Email to Volunteers

Users with the *Can Manage Events* permission can send an email to all volunteers who have signed up for a specific event or to all eligible volunteers from the **Events** tab.

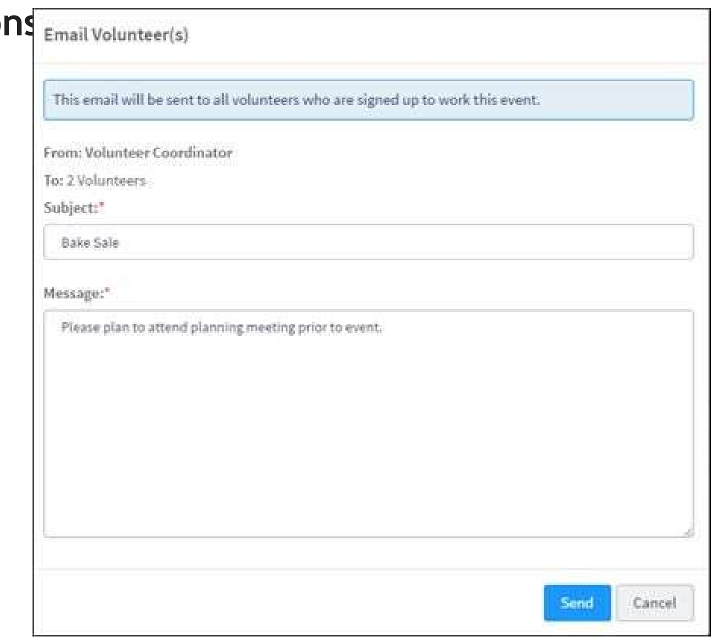
1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the h icon next to the event to expand the **Event Detail**.



3. In the **Volunteers Signed Up** grid, click **Email Options** and select one of the following:
   - **Email All Signed Up** – Select this option to send an email to all volunteers who are signed up for the event.
   - **Email All Eligible** – Select this option to send an email to all eligible volunteers who can volunteer for the event.

   To send an email to an individual volunteer who is signed up for the event, click **Email** in the **Options** column.

   Note: If the volunteer does not have an email address in their profile, the **Email** button does not display.
4. Enter the email **Subject** and **Message**, and then click **Send**.

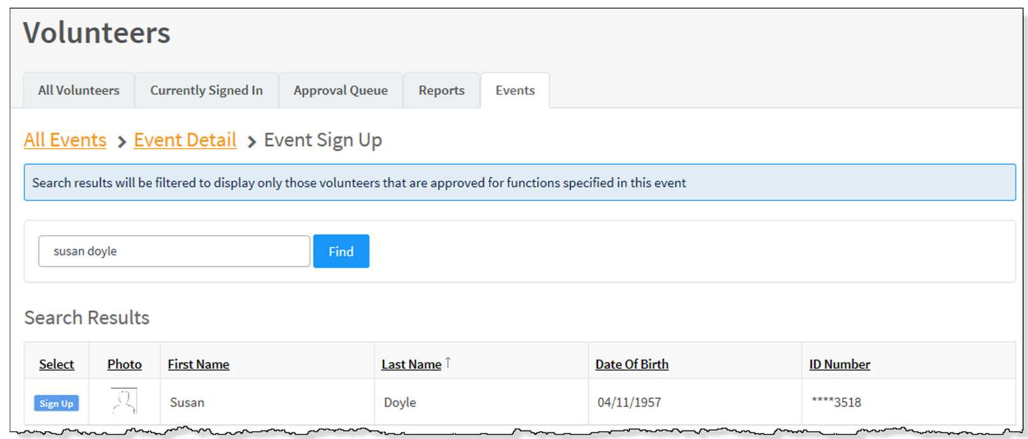


Sign Up Volunteers for Event

Volunteer Coordinators can view who has signed up to volunteer for an event from the **Event Detail** workspace.

Note: You must have the Raptor Volunteer Management System enabled to see this feature.

1. From the navigation menu, select **Modules > Volunteers** and then click the **Events** tab.
2. On the **All Events** workspace, click the h icon for the event.
3. On the **Event Detail** workspace, navigate to the **Volunteers Signed Up** grid and click **Event Sign Up**.
4. Enter the volunteer's **First** and/or **Last Name** and click **Find**.
5. In the **Search Results**, click **Sign Up** next to the volunteer's name.



Note: Only those volunteers that match the search criteria and the Functions selected in the event detail will be returned in the Search Results.

The volunteer displays in the **Volunteers Signed Up** grid for the event and the number in the **Signed Up** field increments.