

Let's

GetConnected!

Digital Volunteer
Management Covering
Muskegon,
Newaygo,
& Oceana Counties!

United Way
of the Lakeshore

United
Way



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Your Agency Page:

Your agency or program's profile page contains important information volunteers need in order to:

- Know your agency or program's purpose
- Contact your agency or program
- Locate your agency or program
- View and sign up for your agency or program's volunteer opportunities
- Learn about and plan to attend your agency or program's events

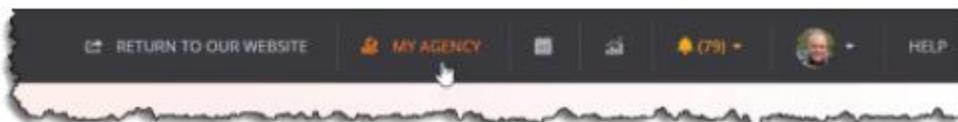
After signing on as an agency or program, update your agency or program's profile page as soon as you can.

Accessing the Agency/Program Management Area

This management area is where you can edit your agency or program's profile, add and edit needs and events, and approve volunteer hours that have been submitted.

To access your management area:

1. Log into your site.
2. Click the My Agency (or My Program) button at the top of the screen.



Note: If you manage two or more agencies/programs, you'll need to click the button to view and select from a list of the agencies or programs you manage.

Editing an Agency or Program Profile

The profile is divided into eight main areas:

- Logo
- Managers
- Basic Information
- Contact Information
- Location
- Links
- Descriptions
- Photos

Logo

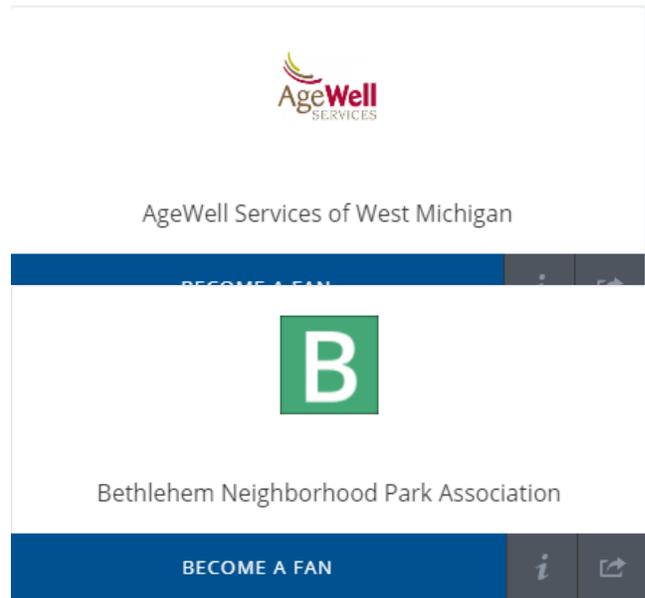
Your logo is an important part of your agency or program profile. It appears in agency/program searches by volunteers, as well as on the main page of every need and event you post. Here's an example of an logo:

If you don't upload a logo, then the first letter of your agency or program name will be displayed in a colored box in place of a logo:

Uploading Your Logo

To upload your logo:

1. In your manager area, click Upload Logo.
2. Browse to the logo, select it, and click Open.
 - a. **Note:** The image should be at least 540 pixels by 540 pixels. You'll be able to resize it in the next step.
3. (as needed) Click and drag the borders to resize the image.
4. Click the applicable Save button.



Note: To remove a logo, click Remove under the Upload your logo heading. To replace an existing logo, first remove it and then upload a new one.

Making Your Logo Appear Larger

Some logos may appear larger than others. Here are a couple of tips for making your logo appear as large as possible in the space provided:

- Use a logo that is roughly as wide as it is tall. Perfect squares and circles are best.
- Use the cropping tool to crop out as much surrounding white space as you can, or crop the image before uploading it.

Agency/Program Managers

An agency or program manager is someone who can access the management area for an agency or program. This individual can edit the agency's profile, post needs, post events, and approve hours on behalf of the agency or program.

Each agency or program must have at least one manager. If there is more than one manager, one person serves as the primary manager while all others are secondary.

This section of this article covers the difference between primary and secondary managers and explains how to add a new manager, how to delete a manager, and how to change a manager's status from secondary to primary.

Primary and Secondary Agency/Program Managers

To register your agency or program, you must submit an email address. The system associates this email address with primary agency manager.

In addition to the capabilities mentioned above, *a primary manager* can add and delete secondary managers.

Secondary managers can be added to an agency or program once it's been created. Secondary managers have all of the capabilities mentioned above but cannot add or delete other managers.

NOTE: You can have up to 12 manager per agency.

Adding a Secondary Manager

To add additional managers:

1. Go to your management area. Under the "Managers" heading, you'll see the name of the primary manager (and any other managers).
2. Begin typing the email of the individual to be added. If that email is registered on your site, it will show up and you can select it.

The screenshot shows the 'Agency Managers' interface. At the top, there is a heading 'Agency Managers' and a search input field labeled 'Enter Email'. Below the search field, two manager cards are visible: 'MANAGER, MERIWETHER' with a star and an 'X' icon, and 'ADMIN, ANNABELLE' with a star icon. Below this, a second 'Agency Managers' section shows a search input field with the text 'manag' entered. A dropdown menu is open, showing a search result: 'Manager, Meriwether [manager@example.com]' with a star icon and a mouse cursor pointing to it. Below the dropdown, the 'ADMIN, ANNABELLE' card is visible.

Note: If the person's email address is not displayed, the person is probably does not have a Connect account. If you're certain that they do have an account, check the spelling or consult your records to make sure you have the correct email address.

Basic Information:

The "Basic Information" section of the profile contains the fields described below.

Agency Name	The name of your agency or program; completed automatically based on your entry when signing up your agency or program.
Customize Link	This field helps you create a direct link to the profile page. The link will consist of: (1) the site's web address (2) /agency/detail/ (3) the unique label that you enter in this field. For example, if Community Paws Pet Therapy's profile is located on the volunteernow.galaxydigital.com site and the agency manager enters "cppt" as the

	customized link, their profile page will be located at volunteernow.galaxydigital.com/agency/detail/cppt .
Hours of Operation	Because this is a free-text field, you do not have to use any special format to enter days and times.
Causes	Use this field to identify the causes your agency supports. Your selections will be used to match volunteers with agencies that interest them.
Video	Once you've uploaded your video to YouTube or Vimeo, enter your video's YouTube or Vimeo URL here.

Contact Information:

The "Contact Information" section of the profile consists of fields described below. The Email, Phone, Fax, Contact Person, and Contact Title information will be displayed publicly on your site unless your site manager has opted to hide this information for all agencies or programs.

Email	Enter the email address used for general inquiries.
Phone, Fax	Enter the phone and fax (if applicable) numbers.
Contact Title	Enter the primary contact's title. Note: A person does not have to have a user account in order to be listed as a primary contact.
Additional Contact Email Addresses	Enter the emails you would like to have copied (cc'ed) on all need responses and RSVPs sent to the agency or program managers. Note: A person does not have to have a user account in order to be listed as an additional contact.

Important: The email address entered here is for viewers who wish to contact your agency or program by email. It is not used for automated notifications. Only the agency/program managers and additional contacts receive automated notifications.

Location:

The address you enter here will be shown on the map on your profile page. Here's an example:

Note: If you don't want your address to be public or shown on a map, you can enter a P.O. Box instead of a street address.

The Additional Location Information field can be used for the following types of information:

- Parking instructions if needed
- Landmarks to help people find you
- Instructions for getting to a suite or other office within a larger building
- Information about multiple locations



Links

Use this sections to provide your website URL, along with your Facebook and Twitter pages. These links will appear as Website, Facebook (with Facebook logo), and Twitter (with Twitter logo), respectively.

Descriptions

The "Descriptions" area of your profile consists of two sections:

- **Who We Are** - History, mission, and vision
- **What We Do** - Programs and services

Because the descriptions are so important, they appear at the top of your profile page, next to the logo.

Tip: For easier viewing, try to limit your descriptions to just a couple of paragraphs.

Photos

You can add up to 12 photos. Photos are displayed in slideshow format at the bottom of the profile page. Photos must be image files (jpg/jpeg, png, or gif) in order to load properly.

To add a photo:

1. In the "Photos" section of your profile editing page, click **Add New Photo**.
2. Browse to the photos you want to add and select them.
3. Either click **Open** or simply drag and drop the photos into the **Add New Photos box**. This action adds the pictures to your page.
4. Click **Okay**, or click **Refresh Now** to view the pictures on your profile editing page.

To see the slideshow of your photos, scroll to the top of the page and click **View**.

The photos are automatically displayed as a slide show, but a user can also manually scroll through them by clicking the arrows in the bottom left-hand corner of the picture.

Viewing Agency Statistics

As an agency manager, you can use your Stats area to get a sense of volunteers' engagement with your agency's profile page and posted needs and events. This article explains how to access and export agency data. It also explains what information you'll find in the exports.

Accessing and Viewing Agency Data

To view agency statistics:

1. Click the My Agency button in your utility bar to access your agency-management area.



2. Click **Stats**.



Your Stats area has four main sections:

- **Area to specify a date range:** Default is the past month.
- **Total fans and page views:** Totals shown are for the date range specified. Views include both logged-in users and visitors, and repeat views count as separate views.
- **Active Need Responses:** All responses that have been submitted during the specified date range. Data include response ID; need ID, name, and date; and volunteer name and email.
- **Active Need Hours:** Response ID, approved hours, volunteer name and email address, need name, date volunteered, check-in and check-out times (if applicable), and approved status, all for a selected date range.

Note: Use the table filter to change which columns are shown on your screen.

Exporting Agency Data

The **Stats** area includes buttons for exporting need responses and hours. These exports include data not shown in the table on your screen. Columns for each export are provided below.

Need Responses Export

This export includes:

- Response ID
- Response date
- Need name
- Shift ID, start date and time, and duration (if the need is a shift need)
- Volunteer first name, last name, email, phone, company, and address
- Any notes provided by the volunteer when responding to the need
- Team name and team leader (if the volunteer is part of a team response)
- Answers to any additional questions added by the site manager

Note: The site manager can add custom questions for all needs on the site and for all needs within a certain initiative.

Hours Export

This export includes:

- Date of the volunteer work (not the date the hours were submitted)
- Need title
- Hours volunteered
- Miles traveled (if submitted)
- Answers to any hours-submission questions added by the site manager
- A description of the hours (if submitted)
- Check-in and check-out times (if volunteer check-in was used)
- The source of the hours, if not manually entered by the volunteer (e.g., if the hours were exported or applied automatically through volunteer check-in)
- The status of the hours (Approved, Denied, etc.)
- The volunteer's first name, last name, and email address
- The volunteer's team, if they signed up with a team

Note: If the team leader entered default a team member's hours on their behalf, this will be specified in the Description column.

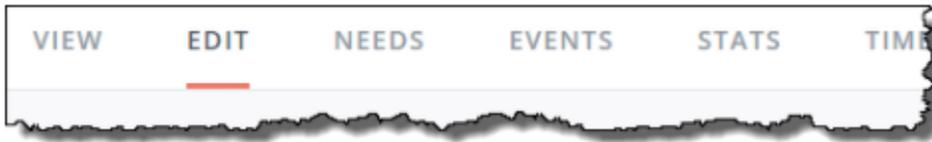
Posting and Managing Needs for Your Agency or Program

This article covers how to post a need, how to edit an existing need, and how to deactivate a need. It also provides information about the notification you receive whenever someone responds to a need and provides some information about using volunteer check-in and volunteer waitlists for needs.

How to Post a Need

To post a need on a Connect site:

1. Log in and go to your agency or program management area by clicking the **My Agency** button at the top of your screen. If you manage more than one agency, click My Agencies and select from the list provided. By default, you will be taken to the **Edit** tab of your manager view.



2. **Click Needs.**
3. Click **Add New Need** to open the **Create Need** form.
4. Complete the fields in the form. Fields are described below:

Field	Description:
Title	Enter Need Title – This is the first thing a volunteer sees. Make it fun!
Description	Enter a need description. If training or a background check is required, you can include that information here. Be as specific as possible. Make sure you cover your 5 W's and that it answers every question you think a volunteer might have. Add some photos or videos for fun!
Initiative	Select the initiative, if applicable, with which to associate the need.
Privacy	Select whether to make the need public (available to all site visitors) or private (available only to an assigned user group, or via a private link). Private links are great for internal operations or targeted groups!
Duration	Select a duration. Options are Ongoing, Runs Until, Happens On, Multi-date, Custom Shifts, and Recurring Shifts. VERY IMPORTANT: Please refer to the Types of Needs Section
Capacity	If applicable, enter the number of volunteer slots available for this need.
Require Background Check?	Please skip this step. Your agency will not be utilizing the Sterling Volunteers
Allow Team Registration?	Indicate whether you do not want to allow team registrations, you do want to allow team registrations, or you want to allow only team registrations. When searching needs, users can filter needs by which opportunities accept (or don't accept) team registrations.
Qualifications	Select any qualifications that volunteers must meet in order to view or respond to this need. Note: Volunteers must meet <u>all</u> selected qualifications. If you need a special qualification added, please contact our office at Dominique@unitedwaylakeshore.org or call (231) 332-4006

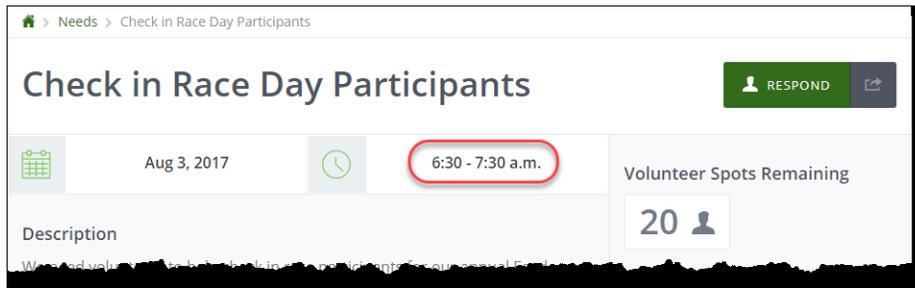
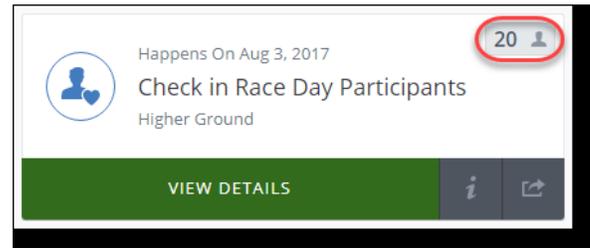
Minimum Age	Select the minimum volunteer age accepted for this need. Once you've entered an age range (starting with this field), volunteers can search for the needs best suited to their age group.
Maximum Age	Select the maximum volunteer age accepted for this need. Once you've entered an age range (starting with the previous field), volunteers can search for the needs best suited to their age group.
Family Friendly	Indicate whether the need environment is family-friendly (meaning smaller children are acceptable to be around). Volunteers can search specifically for family-friendly needs.
Outdoors?	If you select Yes to indicate an outdoor need, you will have the opportunity to provide inclement weather plans. Volunteers viewing this need will see this information in the Details area at the bottom of the need-information page. They will also be able to search all needs on your site by which ones are (or are not) outdoors.
Wheelchair Accessible	PLEASE INDICATE AS MUCH AS POSSIBLE Indicate whether the need will be wheelchair-accessible. Volunteers viewing this need will see this information in the Details area at the bottom of the need-information page. They will also be able to search all needs on your site by which ones are (or are not) wheelchair-accessible.
Attributes	If you want additional details to stand out from the description above, include them here. Each detail (attribute) must be 200 characters or fewer. Attributes appear in the Details section at the bottom of the need-information page. Examples: Snacks included, Wear Steal Toe Shoes, Please bring sunscreen,
Address	Enter the address of the opportunity. (If this need is for an individual home, consider leaving the address blank until a volunteer has registered)
Zip Code	(required) Enter the zip code associated with the opportunity. Users can search needs by ZIP codes.
Impact Area	Select the applicable impact area.
Interests/Skills & Abilities	Select interests or skills related to the need. Your selections will help the site to match up this need with potential volunteers. Users can also search needs by interest.
Additional Notification Recipients	To have certain people copied on all responses to this need, turn this option On and type each recipient's email address on a separate line. Recipients will also be notified when volunteers unregister from the need. An additional notification recipient is not required to have a Connect account.
Waiver	If a waiver is added, a volunteer must indicate that he or she agrees to it before they can complete their need response. Click Choose File to select the waiver to upload. Acceptable file formats are .doc, .docx, and .pdf. Notes: (1) If a volunteer has not responded to the need and wishes to check in to the need using the Volunteer Check-in tool, the waiver (if one has been added) will be required for check-in. (2) Some sites may override the word "waiver" with a different term.

5. Click **Create Need**.

A Note on Runs Until, Happens On, Multi-date, and Shift Needs - If you indicate that a need will be something other than Ongoing, you'll be shown fields for entering more information.

The additional fields (Capacity, Hours, and Registration Closed Date) are optional.

- If you are accepting a limited number of volunteers, enter the number of volunteers needed in the Capacity field. The number of available volunteers will be displayed on the public site; as each volunteer responds, the number of available volunteers displayed will decrease. In this example, there are 20 volunteer spots remaining.
- Once the capacity has been met, the need will be displayed as "full," and volunteers will no longer be able to see or respond to it. Those who have responded to the need will still be able to access it via their profile or a saved link.
- If the need is going to take place at a certain time of day, you can enter the time(s) in the **Hours** field. This information is shown on the need information page.



- If you want to indicate a cut-off date for registration (after which volunteers can no longer respond), indicate that date in the **Registration Closed Date** field. Users will still be able to access the need information, but they will not be able to respond after 12:00 a.m. on the date registration closes. The need itself will be displayed as "Closed."

How to Edit a Need

To edit an existing need:

1. In your manager view, click Needs. All of your agency or program's existing needs are displayed in a table under Manage Needs. **Note:** Expired needs are shown in faded text. To show or hide expired needs, click the applicable **Expired Needs** button above the table. To sort needs by ID, title, date, date type, date added, date updated, or status, click on a column heading. Click **Table Filter** to add or remove columns.

Manage Needs

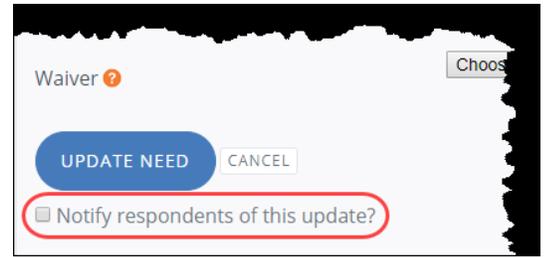
ACTIONS EXPORT RESPONSES EXPORT NEEDS SHOW INACTIVE SHOW EXPIRED [ADD NEW NEED](#)

DEACTIVATE SELECTED

1 2 >

ID	NEED TITLE	PRIVACY	INITIATIVE	DATE	TOTAL RESPONSES	STATUS
561913	COVID Vaccination Clinic - Greeters and Check Ins	Public	COVID-19 Response	Custom Shifts	211	Active
556577	Digital Fraud Fighter - AARP	Public	Volunteer From Home Opportunities!	Is Ongoing	5	Active
556569	Soldiers Angels	Public	Volunteer From Home Opportunities!	Is Ongoing	0	Active
555230	Community Investment Panels	Public	UWL Community Investment Panels	Runs Until Mar 1, 2021	2	Active

2. Click on a need to edit it (or click the **Edit** link beneath the need title).
3. Make any changes needed.
4. Optional: If you changed the need description, date, time, or address/city/state/ZIP and wish to notify registered volunteers of the change, mark the **Notify respondents** of this update check box.
5. Click **Update Need**.



If you clicked to notify respondents of the update, everyone who has already responded to the need will be sent the "Need Update Notification" message.

Cloning A Need:

You can use Get Connected's "Clone Need" feature to post multiple needs that are very similar. This feature is particularly useful when:

- You have different needs occurring at the same location
- You have the same need occurring at different locations (such as a Reading Buddies event occurring at different library branches)
- You want to post a more current version of an expired or inactive need

Opportunity Scheduling: Posting Needs with Shifts

When posting a volunteer opportunity in Get Connected, Campus Connect, Community Connect, or Corporate Connect, you'll need to select a duration type (Ongoing, Runs Until, Happens On, Custom Shifts, or Recurring Shifts). This article focuses on:

- Posting custom shifts
- Posting recurring shifts
- Notifications for shifts
- Editing shifts
- Shifts and volunteer check-in
- Shifts and volunteer waitlists
- How shift needs look to a volunteer visiting your site

Note: Shifts show the day of the week in the volunteer view.

Custom Shifts – The Most Used & Recommended by United Way

Custom shifts are those that don't occur at the same time each day. Here are some examples of needs that would fit into the "Custom Shifts" category:

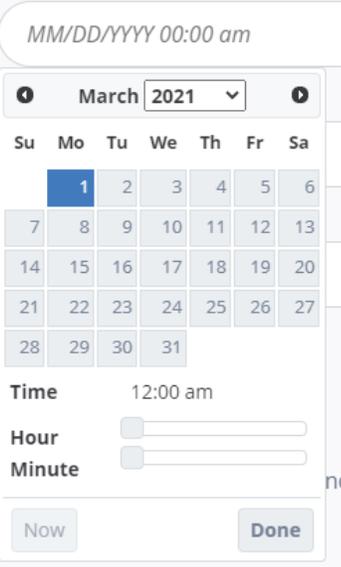
- Multiple shifts within a single day, such as serving shifts at a soup kitchen
- Shifts that occur at different times on different days
- Shift that may occur at the same time but require a different number of volunteers each time

To assign custom shifts to a need:

1. Select Custom Shifts from the Duration dropdown.

Duration *  Custom Shifts 

2. Complete the three Shift fields that appear. These fields are described below.

Field	Description
Shift Date/Time	<p>Click inside this field to view the date/time picker. Choose the date of the shift from the calendar. Choose the time by adjusting the slider below the calendar.</p> 
Shift Hours	<p>Indicate how long, in hours, the shift will last. Decimals (such as 2.5) are allowed. Note: Type the number only; do not include the word "hours" or any other text.</p>
Shift Capacity	<p>Type the number of volunteers that are needed per shift. For example, if you are posting three shifts that require two volunteers each, you would type 2 (not 6). To open the shift to an unlimited number of volunteers, type 0. Note: In the volunteer view, the total number of volunteer spots will be shown. Using the above example, volunteers will see that the need has six volunteer spots. After clicking to learn more, the volunteer will see that two spots per shift are needed.</p>

3. Click **Add Shift**.

Once you have added a shift, two things happen: The shift is displayed right below the **Add Shift** button (shown below) and the **Shift Date/Time**, **Shift Hours**, and **Shift Capacity** fields are cleared.

ADD SHIFT

 Aug 20, 2020 at 1:00pm for 4 hours with 15 slots.

4. Complete steps 2 and 3 for all additional shifts for this need. Each time you add a new shift, it will be added to the listing. **Note:** To remove a shift, click the X to the left of it, shown in the previous image.
5. Complete all other required and applicable fields for the need (**Allow Team Registration, Address, Interests & Abilities, etc.**)
6. Click **Create Need**.
Once the need has been created, you can view and edit shifts in the **Edit Shifts tab of Edit Need** page. (Your page may read "Edit Opportunity" as shown below. This will depend on the language preference of the site manager).

Twist and Shout

EDIT OPPORTUNITY
EDIT SHIFTS

DELETE SELECTED SHIFTS
EDIT SELECTED SHIFTS
SCHEDULE VOLUNTEERS FOR SHIFTS
SHOW EXPIRED
ADD SHIFTS

<input type="checkbox"/>	SHIFT BEGINS	DAY	SHIFT ENDS	DURATION	CAPACITY	RESPONSES	WAITLIST	SHIFT ADDED	OPTIONS
	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
<input checked="" type="checkbox"/>	Aug 8, 2020 8:00am	Saturday	Aug 8, 2020 12:00pm	4:00	10	1	0		✎ ✕

As volunteers respond to the shifts, the numbers under the **Responses** heading will be updated.

Note: To edit a shift, click the **Edit** (pencil) icon for the shift. You can edit the start date, start time, end date, end time, and capacity. Once you have saved the new information, you must refresh your screen to see the change reflected in the **Need Shifts** table. You will also be prompted to reach out to anyone who has already responded to the edit shift, to inform them of the change.

Recurring Shifts

The "Recurring Shifts" option is for repeating shifts of needs. Here are some examples:

- An agency serves food seven days a week and needs volunteers to work dinner shifts, 5 to 7
- A thrift store needs volunteers to sort donated clothes on the first Saturday of every month.
- A nonprofit needs volunteers to tutor students after school on Wednesdays

The **Recurring Shifts** designation is for shifts that occur at the same time of day. If your shifts occur at different times, whether within the same day or on different days, you should use the Custom Shifts designation instead.

Assigning Recurring Shifts to a Need

The instructions below assume that you are already on the **Create Need** page, which you can access by going to your agency manager view, clicking **Needs**, and then clicking **Add New Need**.

To assign recurring (repeating) shifts to a need:

1. Select **Recurring Shifts** from the **Duration** dropdown. You will see two new required fields: an **Occurs** dropdown and a **Capacity** field.
2. From the **Occurs** dropdown, select the repeating time interval: **Daily, Weekly, or Monthly**
3. If you select **Monthly**, you'll need to specify if the need should occur by **Date** (e.g., the 15th of every month) or by **Day of the Week** (e.g., the first Saturday of every month).
4. Complete the additional fields that are displayed. Click here to jump to the field descriptions.
5. In the **Capacity field**, type the number of volunteers needed for each shift (not for all shifts combined). For example, if you are posting three shifts that require two volunteers each, you would type **2** (not **6**) for each shift. To open the shift to an unlimited number of volunteers, type **0**. **Note:** In the volunteer view, the total number of volunteer spots will be shown. Using the above example, volunteers will see that the need has six volunteer spots. After clicking to learn more, the volunteer will see that two spots per shift are needed.
6. Fill out any other required and applicable fields.
7. Click **Create Need**.

Note: Once you have clicked Create Need, you cannot change the duration type for Custom Shift and Recurring Shift needs.

Once the need has been created, you can view and edit shifts in the **Edit Shifts tab** of **Edit Need** page.

Twist and Shout

EDIT OPPORTUNITY EDIT SHIFTS

Show all days

DELETE SELECTED SHIFTS EDIT SELECTED SHIFTS SCHEDULE VOLUNTEERS FOR SHIFTS SHOW EXPIRED ADD SHIFTS

<input checked="" type="checkbox"/>	SHIFT BEGINS	DAY	SHIFT ENDS	DURATION	CAPACITY	RESPONSES	WAITLIST	SHIFT ADDED	OPTIONS
<input checked="" type="checkbox"/>	Aug 8, 2020 8:00am	Saturday	Aug 8, 2020 12:00pm	4.00	10	1	0		
<input checked="" type="checkbox"/>	Aug 15, 2020 8:00am	Saturday	Aug 15, 2020 12:00pm	4.00	10	1	0		
<input checked="" type="checkbox"/>	Aug 22, 2020 8:00am	Saturday	Aug 22, 2020 12:00pm	4.00	10	0	0		

As volunteers respond to the shifts, the numbers under the Responses heading will be updated.

Note: To edit a shift, click the Edit (pencil) icon for the shift. You can edit the start date, start time, end date, end time, and capacity. Once you have saved the new information, you must refresh your screen to see the change reflected in the Need Shifts table. You will also be prompted to reach out to anyone who has already responded to the edit shift, to inform them of the change.

Automated Notifications for Shifts

As mentioned above, it's easy to edit or remove an instance of a shift after it has been created. If you remove a shift that already has responses, an email notification will be sent to those volunteers, letting them know that they have been unregistered from the shift.

If a volunteer responds to multiple shifts, the volunteer will get a single confirmation email listing all of the shifts. The agency manager, however, will get a separate email for each shift response by a volunteer.

As you will learn in the following section, volunteers will be notified of updates to a shift if you click the Notify Respondents checkbox before submitting your changes.

Editing Shifts within a Need

Once you have created a shift need, you can edit the dates, times, the capacities (number of volunteer slots) for individual shifts.

To edit a shift within a need:

1. Go to the **Needs** section of your agency management area.
2. Click on the need, or click **Edit** under the need title.
3. Select the **Edit Shifts** tab.
4. Click the "pencil" icon for the shift you wish to edit.
5. In the **Edit Shift** window that opens, revise the start date, start time, end date, end time, and capacity as needed. (To open the shift to an unlimited number of volunteers, enter 0 as the capacity.)
6. If volunteers have already responded to this shift and you wish to notify them of changes to the date or time, mark the **Notify respondents of this update?** checkbox.
7. Click **Submit Shift**. If you clicked to notify respondents of the update, a message with the updated information will be sent to all volunteers who were registered for the shift.

SHIFT BEGINS	DAY	SHIFT ENDS	DURATION	CAPACITY	RESPONSES	WAITLIST	SHIFT ADDED	OPTIONS
Aug 8, 2020 10:00am	Saturday	Aug 8, 2020 2:00pm	4:00	3	3	0		

How to Deactivate a Need

When a need is deactivated, it is no longer displayed on your site, and volunteers can no longer respond to it.

To deactivate a need:

1. In your manager view, click Needs. All of your agency or program's existing needs are displayed in a table under Manage Needs. (See image above)
2. Check the box to the left of each need(s) you want to delete.
3. Click on the "trash can" icon in the Actions row above the table.
4. Click Yes to confirm that you are deactivating the need.

Notification of Need Response

When a volunteer responds to one of your needs, an automated notification goes out to your agency/program managers and to anyone listed as an additional notification recipient. This notification shows the need title, volunteer name and email address, and any details and additional notes that the volunteer provided on the need response form.

The volunteer also receives a notification confirming their need response.

Getting To Know Your Check In Kiosk

With Volunteer Check-in, volunteers can easily check into and out of their volunteer opportunities. Volunteer hours are automatically submitted based on check-in and check-out times.

There are three types of volunteer check-in:

- **Check-in Kiosk:** Volunteers check in on their own using a device (such as a tablet) that you provide at the site of the volunteer work.
- **Self Check-in:** By clicking a link in an email or going to the **Need Responses** area of their profile, volunteers access options for checking in, and can later access options for checking out. Volunteers can also schedule their check-in and check-out times in advance as needed. This option is only available for shift needs.
- **Agency Check-in:** Volunteers check in and out using a device (tablet, laptop, etc.) provided by your agency at the site of the volunteer work. This option is available for all needs, including advanced-events needs.

This article focuses on how to use the check-in feature available to agency managers.

Note: Agency check-in is available for both regular and advanced-event needs. Self-check-in applies for shift needs only. It is not available for Ongoing, Runs Until, Multi-date, or Happens On needs (including advanced-event needs).

Managing Volunteer Check-in: Agency Tool

With your agency's Volunteer Check-in tool:

- Volunteers can electronically "check in" when they arrive at the site of a volunteer opportunity.
- Agency managers can electronically check volunteers in as needed.
- When a volunteer "checks out" of the opportunity, your Connect site automatically assigns and approves the volunteer hours to that volunteer.
- If the volunteer forgets to "check out," the system still assigns and approves volunteer hours based on the number of hours specified previously by the agency manager.
- Volunteers who did not previously respond to the need must agree to the waiver (if one was attached to the need) when checking in.

Note: With Volunteer Check-in, there is no need for the volunteer to manually log their hours and no need for the agency manager to later approve them. It's all done automatically!

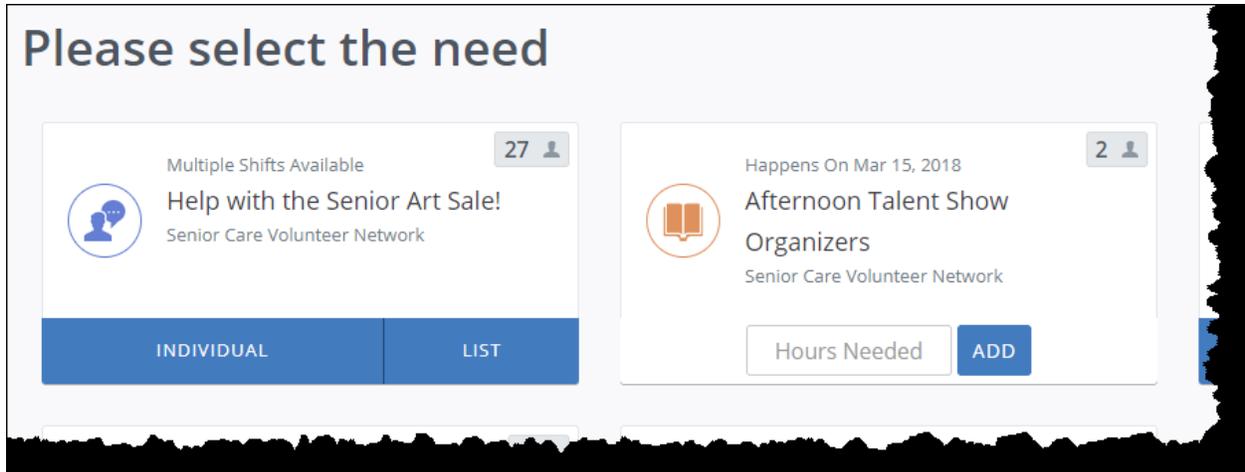
Accessing Volunteer Check-in

To access Volunteer Check-In:

1. Log into your Connect site and click **My Agency** to open your agency management area.
2. If you manage more than one agency, select the applicable agency from the options provided.
3. Click **Check-in** from the agency management toolbar.

Selecting A Need for Check-in

Needs appear in two formats, depending on whether a duration (the number of hours) has been specified for the need.



- **Needs with a duration** - If the posted need has a specified duration, the need is ready for check-in. You can click Individual to check volunteers in one at a time, or List to check them in in bulk.
- **Needs with no duration** - If no hours have been specified for a need, you must provide the number of hours in order to activate check-in. Type a number into the Hours Needed text box and click Add. The screen will update to display the Individual and List options for the need.

Note: If you will be using Volunteer Check-in for multiple needs at the same time, you can right-click the Individual or List button as applicable to open the sign-in pages in new tabs.

Individual View

Individual view is ideal for signing volunteers in one at a time. You should use this view if you expect to check in volunteers who have not yet signed up for the need.

To access this view, click **Individual**. For shift needs, you'll need to select the shift first.

The screenshot shows a table titled "Select a Shift for 'Help with the Senior Art Sale!'". The table has six columns: "SHIFT BEGINS", "SHIFT ENDS", "DURATION", "CAPACITY", "RESPONSES", and "SELECT". There are two rows of data, each with a "SELECT THIS SHIFT" button.

SHIFT BEGINS	SHIFT ENDS	DURATION	CAPACITY	RESPONSES	SELECT
Dec 13, 2017 9:00am	Dec 13, 2017 11:00am	2.00	6	4	SELECT THIS SHIFT
Dec 13, 2017 11:00am	Dec 13, 2017 1:00pm	2.00	6	4	SELECT THIS SHIFT

Note: Because this setup is ideal for volunteers to check themselves in, your utility bar, navigation menu, and other Connect features available for agency managers are not visible on this page.

Once on the individual check-in page, you (or the volunteer) should type the volunteer's email address and then click Find My Account. When your Connect system pulls up the account, you may see options, as applicable, to answer questions or select a user group prior to clicking to check in.

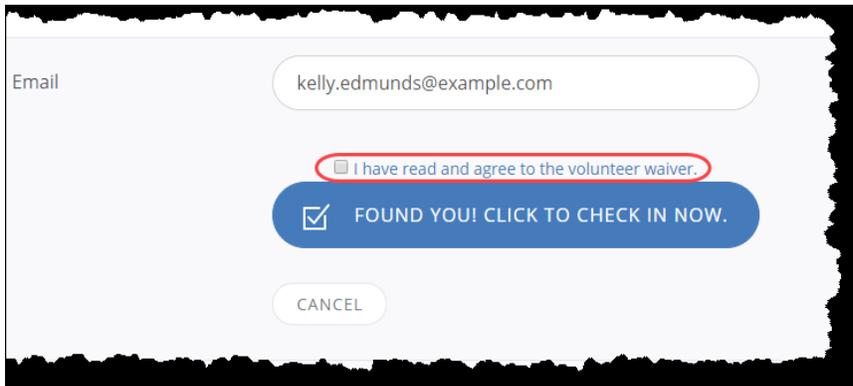
Once the volunteer has checked in, you'll see a confirmation and can proceed to check in the next volunteer.

Checking In Volunteers without a Need Response

A volunteer does not need to have an existing response to the need in order to check in to the need.

If your Connect system does not recognize the email - If an email address is not associated with a registered account, the volunteer will be taken to a screen where they can enter their first and last name to open an account. Once they've registered, they'll be able to check in. They'll also receive an email welcoming them to the site.

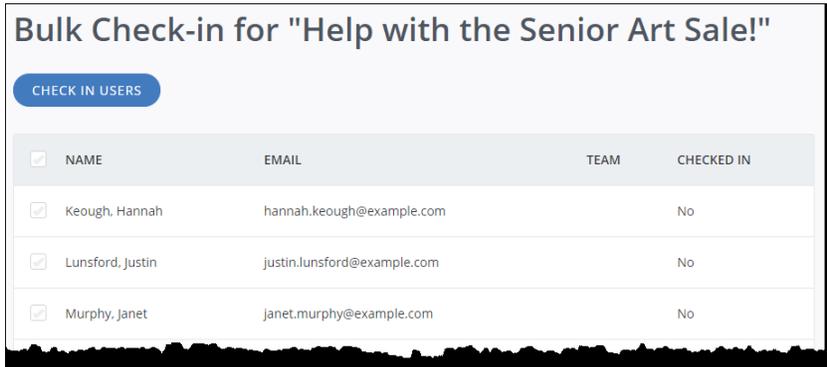
If the need includes a waiver - If volunteers were required to agree to a waiver when signing up for the need, the waiver check will be displayed at check-in for those volunteers who haven't yet responded to the need.



The screenshot shows a web interface for checking in. At the top, there is a label 'Email' and a text input field containing 'kelly.edmunds@example.com'. Below the input field is a checkbox with the text 'I have read and agree to the volunteer waiver.' The checkbox is checked. Below the checkbox is a large blue button with a white checkmark icon and the text 'FOUND YOU! CLICK TO CHECK IN NOW.'. At the bottom, there is a white button with the text 'CANCEL'.

List View

Click **List** to view a list of volunteers who have responded to the selected need.



Note: For shift needs, you'll need to select the shift first.

When you're ready to check the volunteers in, mark the check box next to each name (or mark the top check box to select all) and click **Check In Users**. Once the volunteers are checked in, the **Checked In** column entries change from **No** to **Yes**.

Viewing Checked-in Volunteers

While the **List** view shows who is checked in, the **Checked In Now** section of your agency management area provides that information and more.

USER	NEED	SOURCE	START	END	CHECK-IN	CHECK-OUT
Justin Lunsford	Help with the Senior Art Sale!	Added at: /agency/checkinList/ by Annelise Ferry	Dec 13, 2017 10:00 am	Dec 13, 2017 12:00 pm	Dec 13, 2017 10:25 am	<input type="text"/>
Samantha Rogers	Help with the Senior Art Sale!	Added at: /agency/checkinList/ by Annelise Ferry	Dec 13, 2017 10:00 am	Dec 13, 2017 12:00 pm	Dec 13, 2017 10:25 am	<input type="text"/>
Hannah Keough	Help with the Senior Art Sale!	Added at: /home/checkin/ by Hannah Keough	Dec 13, 2017 10:00 am	Dec 13, 2017 12:00 pm	Dec 13, 2017 10:31 am	<input type="text"/>

Not only does the table show when the volunteer checked in, but it also shows:

- Whether they checked in using the agency check-in tool (/agency/check in above) or the self-check-in tool (/home/check in above).
- Whose account was used to check them in. In the first two rows above, the agency check-in tool was opened from agency manager Annelise Ferry's account. In the third row, Hannah Keough logged into her own account and checked in from there.

Note: If the volunteer does not check out, they will remain in the Checked In Now table until 11:59 PM of the day they checked in. The system attributes the default number of hours for the need or shift to a volunteer who does not check out after checking in.

Checking a Volunteer Out of a Need

When volunteers are ready to check out, they can use their self check-out tool, or you can check them out using your agency check-out tool. The steps you take to access the check-out feature depend on where you are in your agency management area.

There are two ways that you can check a volunteer out from a need:

- Use **the Individual** view for need check-in/check-out.
- Use the **Checked In Now** section of your agency management area

These two options have different benefits:

- With the **Individual** view, volunteers can easily check themselves out, and their check-out times are recorded the moment they check out. With this option, volunteers cannot see the names or email addresses of the other volunteers.
- In the **Checked In Now** section, you have the option of customizing the check-out time as needed. This option shows information for all checked-in volunteers at once.

Regardless of which method you use, the volunteer's hours will be calculated accordingly.

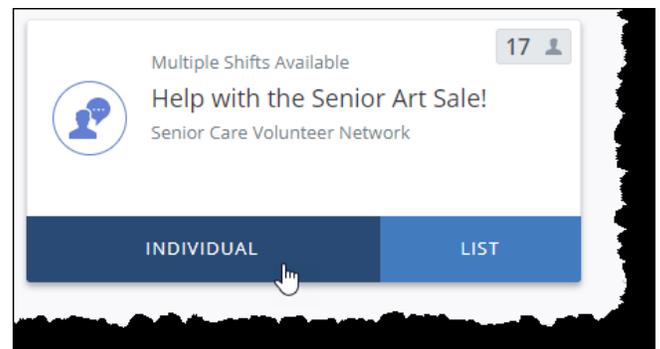
Note: Hours are calculated for the volunteer based on their check-in and check-out times. If the volunteer is not checked out of the need, they will be given credit for the full shift. All hours calculated from the agency's volunteer check-in tool will be approved automatically.

Using the Individual View to Check Out

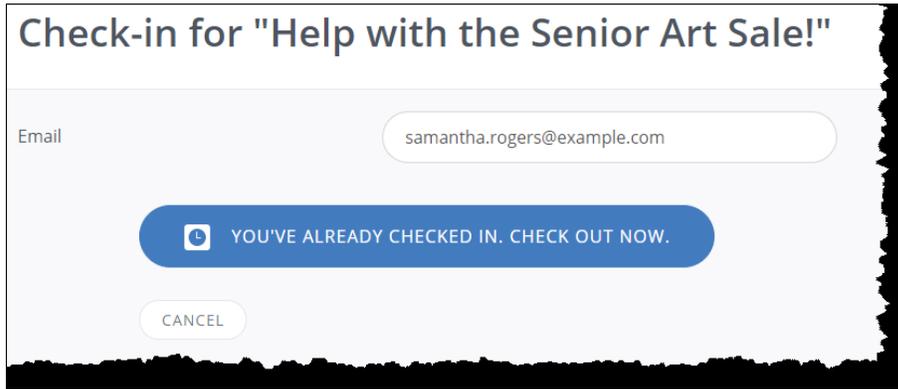
If you used the individual view to check volunteers in, you may still have that view displayed when it's time to check people out. If that's the case, go to Step 2 of the following procedure.

To check out a volunteer (or to have volunteers check themselves out) using the individual view:

1. Go to the Check-in section of your agency management area, where you'll see your agency's active needs displayed. **Note:** Because this setup is ideal for volunteers to check themselves in, your utility bar, navigation menu, and other Connect features are not visible on this page.
2. Click **Individual** under the applicable need. You will be taken to the check-in/check-out page for individuals. **Note:** For shift needs, you'll need to select the shift first.



3. In the **Email** field that is displayed, type the email address of the volunteer you are checking out.
4. Click **Find My Account**. If the person is already checked in, you'll see a button indicating that.

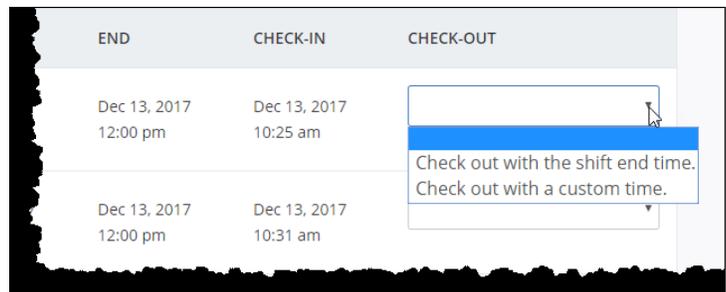


1. Click the **You've Already Checked In** button.

Once the volunteer has been checked out, you'll see a confirmation message on that page.

Using the "Checked In Now" Area to Check Volunteers Out

The Checked In Now section of your agency management area includes a Check-Out column with options for checking volunteers out.



Options are as follows:

- **Check out with the shift end time** - (Available for shift needs only) If you select this option, the system will automatically check the volunteer out at the time specified in the End column shown above.
- **Check out with a custom time** - Select this option to specify the time that the volunteer should be checked out. This is the option to use if you want to check the volunteer out at the current time.

Viewing Hours Details

Once the volunteer has checked out, you can view their check-in and check-out times in the **Active Need Hours** table in the **Stats** section of your agency management area.

HOURS	USER	EMAIL	NEED NAME	DATE VOLUNTEERED	CHECK-IN	CHECK-OUT	STATUS
3.43	Lunsford, Justin	justin.lunsford@example.com	Help with the Senior Art Sale!	12/08/17	12/08/17 8:33 am	12/16/17 12:00 pm	✓
3.35	Jenkins, Keisha	keisha.jenkins@example.com	Help with the Senior Art Sale!	12/08/17	12/08/17 8:38 am	12/16/17 12:00 pm	✓

You can also export this information into a spreadsheet. The export also shows the source of each check-in and check out (in other words, how they were checked in and out, and whose account was used).

Managing Your Agency's Need Responses

As an agency manager, you can view and manage details about all need responses, including shift responses. You can also see how many slots volunteers have responded to each of your posted needs, as well as the total capacity for each need.

Viewing and Managing Response Data

View and manage response data from the Responses table of your agency management area:

1. In your agency management area, click **Needs**.
2. Beneath the need title, click **Responses**.

<input type="checkbox"/>	ID	NEED TITLE	PRIVACY	INITIATIVE	DATE	TOTAL RESPONSES	STATUS
<input checked="" type="checkbox"/>	561913	COVID Vaccination Clinic - Greeters and Check Ins	Public	COVID-19 Response	Custom Shifts	213	Active
		Edit Responses View					

Responses

ACTIONS

Table Filter

<input type="checkbox"/>	USER	TEAM	BEGINS	OPTIONS
<input checked="" type="checkbox"/>	Ammy Seymour		Jan 21, 2021 @ 9:00am	✎ 🕒 ✕
<input checked="" type="checkbox"/>	Mary Beth Trzaska		Jan 21, 2021 @ 9:00am	✎ 🕒 ✕
<input checked="" type="checkbox"/>	Chanda Dunn		Jan 20, 2021 @ 9:00am	✎ 🕒 ✕
<input checked="" type="checkbox"/>	Madison Dunn		Jan 20, 2021 @ 9:00am	✎ 🕒 ✕

The Responses table lists volunteer names, teams (if applicable), eSign waiver status (if applicable), whether they are an adult or a minor, and need dates. Using the table filter, you can opt to view the volunteers' email addresses and the dates of the need responses.

You can perform the following tasks from this page:

- Export responses to a spreadsheet
- Submit hours for your volunteers, both individually and in bulk
- Adding a volunteer response
- Remove a volunteer response
- Email your volunteers

In addition, you can adjust the table to view more (or less) related data.

Exporting response data to a spreadsheet

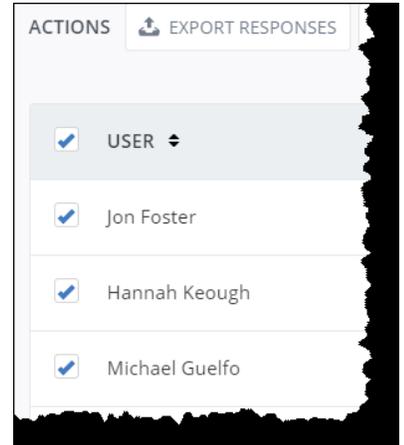
When you export response data, your Connect site generates a spreadsheet listing each volunteer's first and last name, team (if applicable), and email address, along with the need dates and times.

To export responses from the Responses table:

1. Access the **Responses** table for the need, using the steps described here.
2. Mark the check boxes next to the responses to export. To select all volunteers who responded, mark the check box at the top of the column.
3. Click the **Export Responses** button (shown in the previous image).

The response export includes the following information:

- Response ID
- Date the response occurred
- Need title
- Initiative (as applicable)
- Need or shift ID
- Shift start date, start time, and duration (if a shift need)
- ID of the person who agreed to the click-wrap waiver (if a waiver is involved)
- Volunteer's first name, last name, email address, phone number, and any notes submitted when responding to the need
- Team name and leader (if the volunteer is part of a team response)
- Answers to any need-response or initiative questions specified by the site manager



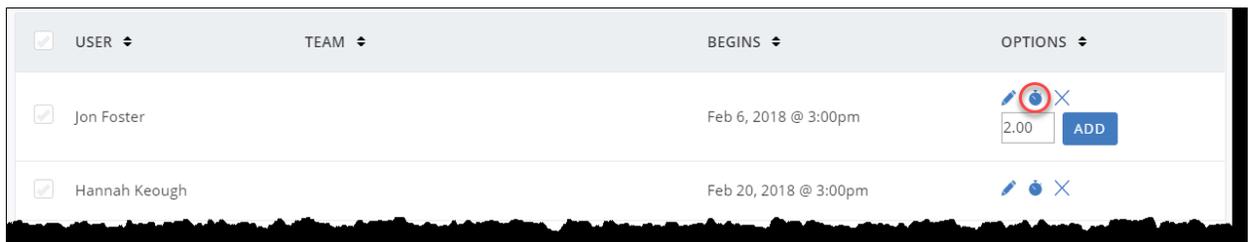
Submitting hours on behalf of a volunteer

As an agency manager, you can submit hours for your volunteers. These hours show up in your Stats area and on the volunteers' résumés. From the responses table, you can submit hours individually (for a single volunteer at a time), or you can submit them in bulk. **Note:** You can also submit hours from the Time Tracking area of your Agency Management Area.

Submitting hours individually

To submit hours for an individual volunteer from the Responses table:

1. Access the Responses table for the need, using the steps described earlier.
2. In the row of a volunteer, click the stopwatch icon.



3. To add the default number of hours, click Add. To override this number, type a different number into the field before clicking Add. **Note:** Once you've added hours, you'll see a temporary "Hours Added!" message. To see how many hours have been submitted for a volunteer (either by themselves or by someone else), see the Stats area of your Agency Management Area.

Submitting hours in bulk

You can submit hours for multiple volunteers who have responded to a particular need. When submitting hours in bulk, you can only submit the default number of hours for the need. If you need to override the default, you should submit hours individually.

To submit hours in bulk from the **Responses** table:

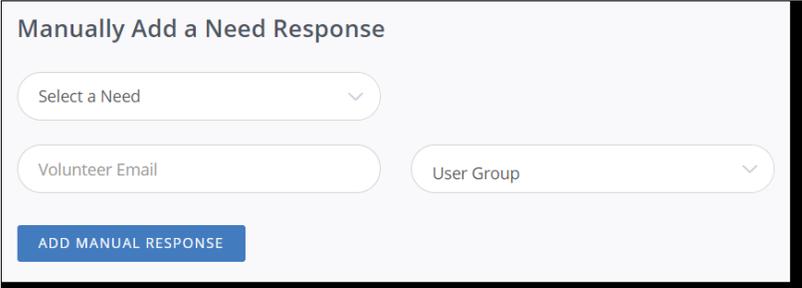
1. Access the **Responses** table for the need, using the steps described here.
2. Mark the check boxes next to the names of the volunteers for whom you're adding hours. To select all volunteers listed, mark the check box at the top of the column.
3. Click the **Add Default Hours** button above the table. You will see a message confirming that the hours have been added.

Note: To see how many hours have been submitted for your volunteers (either by themselves or by someone else), see the Stats section of your Agency Management Area.

Adding A Volunteer Response

To add a need response on behalf of a volunteer:

1. Go to the **Needs section** of your Agency Management Area and **scroll down** to the Manually Add a Need Response area.
2. Select the applicable need from the **Select a Need** dropdown. If applicable, select a shift as well.
3. Type the volunteer's email address into the **Volunteer Email** field.



Manually Add a Need Response

Select a Need

Volunteer Email

User Group

ADD MANUAL RESPONSE

4. Click **Add Manual Response**. You will get a confirmation message once the response is logged by the system.

Note: Need responses can only be added for volunteers with a user account. If a volunteer does not have a user account, they must create one before you can submit a need response on their behalf. **Important Helpful Hint:** If you are in the beginning stages of utilizing your GetConnected Platform, the United Way of the Lakeshore can upload your volunteer list in the system to invite them to set up their profile. This will allow you to manually enter them regardless if they have an account or not. Contact Dom Bunker at Dominique@unitedwaylakeshore.org or call (231) 332-4006

Removing a volunteer response

To remove a volunteer's response to a need:

1. Go to the **Needs** section of your Agency Management Area and click the Responses link, shown beneath the need title.
2. In the **Responses** table displayed, click the **X** in the row of the response to delete.

Note: Removing a response triggers an email notification to the volunteer, informing them they they have been unregistered from the need or shift. In addition, if the need occurred in the past, removing a response will remove any associated volunteer hours that have been submitted.

Viewing data in the responses table

By default, the responses table displays the user name, team name (if applicable) start date, and a column for options (adding hours and deleting the response). To view more information (or less), click **Table Filter**. Under the **Toggle Column Display** heading, mark or un-mark columns as desired.

To close the filter, **click the X** in the top right-hand corner (shown in image above).

Emailing Your Volunteers

To email volunteers who have responded to a particular need:

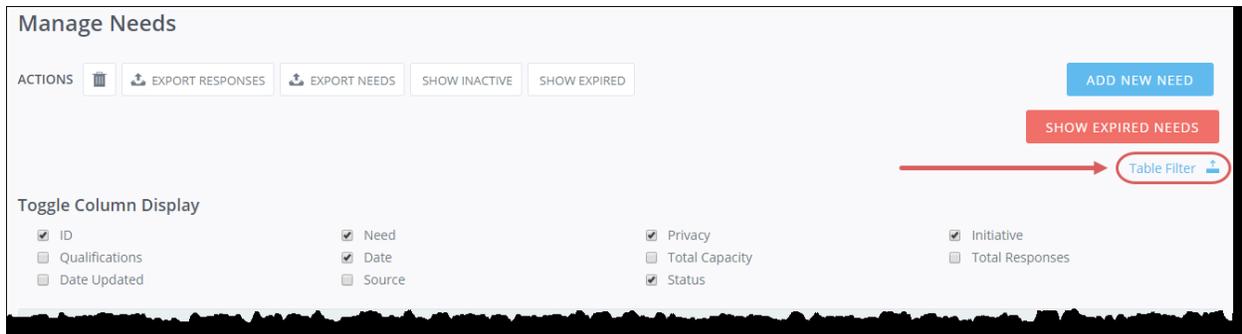
1. Go to the **Needs** section of your Agency Management Area and click the **Responses** link, shown beneath the need title.
2. Select the volunteers to message. Mark the checkbox above the left-hand column to message all volunteers displayed.
3. Click the **Message Responders** button, then click **Yes** to confirm.
4. Complete the **Subject** and **Message** fields of the form that is displayed.
5. Click **Send Email**. You'll see a message confirming that the email has been sent.

Note: Because the message is being sent through the Connect platform, it will have a no-reply return address. This means that your recipients will not be able to reply to it. If you are expecting a response, you should provide an email address in the body of your message. Even if you're not expecting a response, you may want to clarify that the email is coming from a no-reply address. ***You can also download a Responses Report and copy the email addresses through the spreadsheet to use your own emailing system to avoid no-reply emails.***

Viewing Number of Need Responses and Total Capacity

To see how many responses you a need has received, as well as how many volunteer slots each need has:

1. In your agency management area, click **Needs**.
2. Click on the Table Filter, located just above the **Manage Needs** table on the right. This action displays all of the possible columns that can be displayed in the table.



3. Mark the **Total Capacity** and **Total Responses** boxes to see the need capacities and total responses, respectively, for each need listed.

The table will now show those columns. In the example below, note that needs that don't have a capacity will show "Unlimited" in the Total Capacity column.

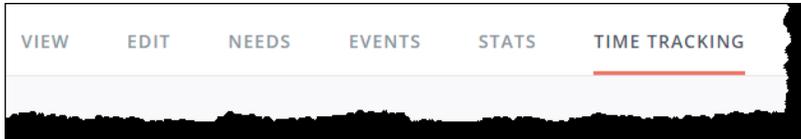
Managing Volunteer Hours

Volunteer hours are managed under the Time Tracking tab, which you can access by clicking My Agency (or My Program, if your site uses programs) at the top of your screen.

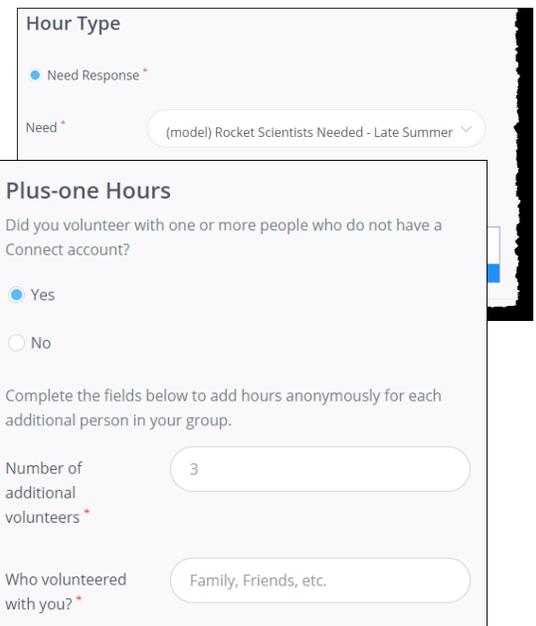
Adding Volunteer Hours (Great for Ongoing Needs or Programing)

To add volunteer hours for someone who volunteered for your agency or program:

1. From the agency/program manager view, click **Time Tracking**.



2. Under the **Hour Type** heading, select the applicable need.
3. Select the name of the volunteer from the **Volunteer** dropdown.
4. Enter the **Date** the hours were earned.
5. Complete the applicable **Hours Details** and **Description** information.
6. Select a **User Group** from the dropdown, if applicable.
7. Scroll down to select if you want to add Plus-one Hours. This option is used when the volunteer you are entering hours for brought family or friends to help with the opportunity who do not have a registered account. If you select **Yes**, you will be asked to complete additional fields.
8. Click **Submit Hour Entry** to save your work.

A screenshot of a form with two sections. The top section is titled 'Hour Type' and has a radio button selected for 'Need Response *'. Below it is a dropdown menu for 'Need *' with the selected option '(model) Rocket Scientists Needed - Late Summer'. The bottom section is titled 'Plus-one Hours' and asks 'Did you volunteer with one or more people who do not have a Connect account?'. It has two radio buttons: 'Yes' (selected) and 'No'. Below this is a text prompt: 'Complete the fields below to add hours anonymously for each additional person in your group.' There are two input fields: 'Number of additional volunteers *' with the value '3' and 'Who volunteered with you? *' with the value 'Family, Friends, etc.'.

Adding Anonymous Hours

Anonymous hours are volunteer hours submitted on behalf of volunteers who are not associated with a particular user account in Get Connected. If your site allows submission of anonymous hours, an agency/program manager can submit hours for:

- Groups of volunteers who may or may not have Get Connected accounts
- Volunteers who do not have a Get Connected account

Of course, you should encourage your volunteers to open a Get Connected account so that they can log their own hours. If a user doesn't have an email address or otherwise does not want to open an account, you can still log their hours. Anonymous hours show up in administrative reports but cannot be applied to individual volunteer résumés.

To log anonymous hours as an agency or program manager:

1. From your agency/program manager view, click **Time Tracking**.
2. Under the **Hour Type** heading, select the applicable need.
3. Select **Add Anonymous Hours** from the Volunteer dropdown
4. Complete the applicable fields. Use the Description field to provide any relevant information about the names of the volunteers, the number of volunteers, etc.
5. Click **Submit Hour Entry** to save your work.

Note: Anonymous hours show up in administrative reports but cannot be applied to individual volunteer résumés.

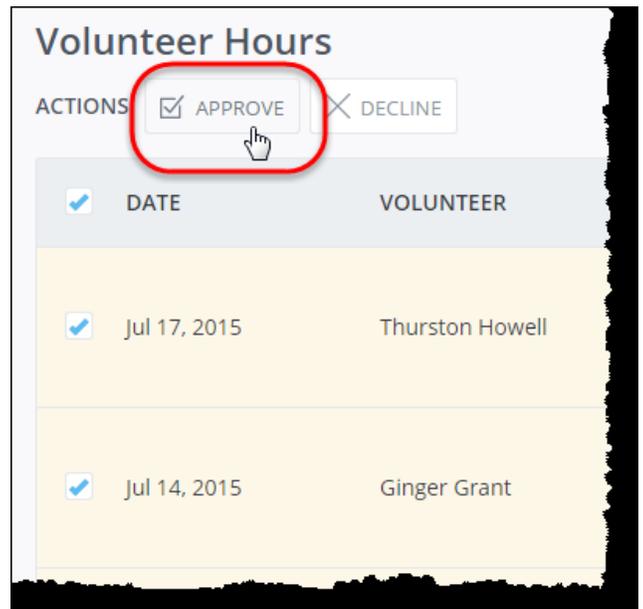
Approving and Declining Volunteer Hours

Before you can approve a volunteer's hours, the volunteer must respond to a need and submit his or her hours related to that need (via the user's **My Profile** page). As the agency or program manager, you will receive an email notifying you that hours need to be approved.

DATE	VOLUNTEER	DETAILS	HOURS	MILES	STATUS
Jul 17, 2015	Thurston Howell	Tour Guide of Facility	1.50	5	Pending
Jul 14, 2015	Ginger Grant	Tour Guide of Facility	1.50	1	Pending
Jul 16, 2015	Mary Ann Summers	Tour Guide of Facility	1.50	4	Pending
TOTALS			4.5	10	

To approve (or decline) volunteer hours:

1. Go to the gray **Time Tracking** tab in edit mode. You will see a list of need responses, along with **Pending** statuses in the table shown. **Note:** The table can show the following columns in addition to the ones shown above: Team, Description, and User Group. To view those columns, click Table Filter (right above the table, right-hand side) and mark the columns to view. You can also use the Table Filter to hide columns you don't want to see.
2. Approve or decline the hours as applicable. To approve or decline hours for one person, select **Approved (or Declined)** from the **Status** dropdown. To approve or decline hours from more than one volunteer, check the boxes for the volunteers and then click the **Approve** button above the table.
3. Click **Yes to confirm**.



Exporting a Sign-in Sheet for a Need

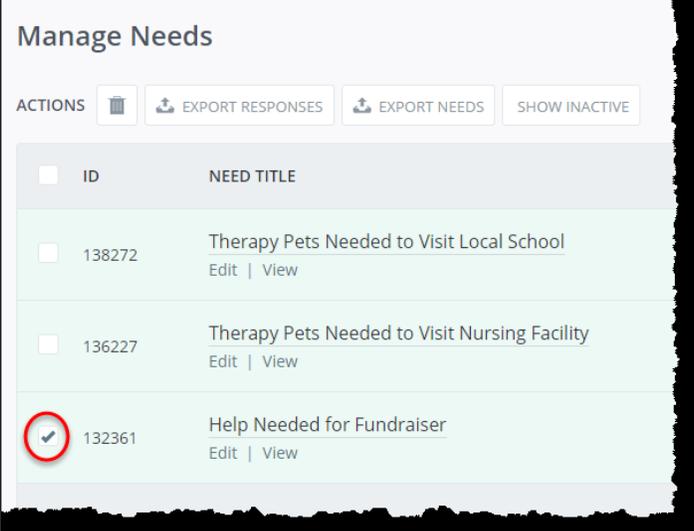
Note: Your Connect site has electronic sign-in capabilities. Go to the Check In section of the manual.

As an agency manager, you can export a list of the volunteers who have responded to any need you have posted. This export can be used as a checklist, sign-in sheet, or other report of volunteers for a need.

To export a list of need respondents:

1. Go to your agency manager view and click Needs.
2. Locate the need for which you want to export volunteers, and mark the check box to the left of it.
3. Click the **Export Responses** button in the Actions row, located at the top of the table of needs.

You can now open the list of respondents in the generated spreadsheet.



The screenshot shows the 'Manage Needs' interface. At the top, there are four buttons: 'ACTIONS' (with a trash icon), 'EXPORT RESPONSES', 'EXPORT NEEDS', and 'SHOW INACTIVE'. Below these is a table with two columns: 'ID' and 'NEED TITLE'. The table contains three rows of needs. The first row has ID 138272 and title 'Therapy Pets Needed to Visit Local School'. The second row has ID 136227 and title 'Therapy Pets Needed to Visit Nursing Facility'. The third row has ID 132361 and title 'Help Needed for Fundraiser'. Each row has a checkbox to its left. The checkbox for the third row is checked and circled in red. Below each need title are links for 'Edit' and 'View'.

ID	NEED TITLE
<input type="checkbox"/> 138272	Therapy Pets Needed to Visit Local School Edit View
<input type="checkbox"/> 136227	Therapy Pets Needed to Visit Nursing Facility Edit View
<input checked="" type="checkbox"/> 132361	Help Needed for Fundraiser Edit View

Volunteer Scheduling

This section is geared toward agency managers who wish to manage their shift needs.

The Schedule section of your agency management area features a calendar that displays your agency's shift needs (custom and recurring shifts), as well as your volunteers' responses. With this calendar, you can:

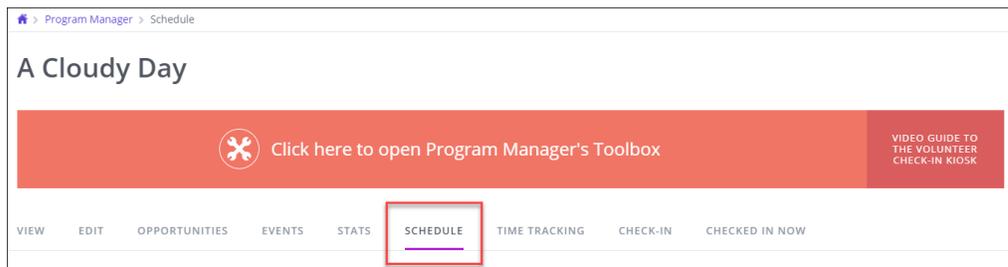
- see how many slots have been filled for a shift, and how many remain
- see which volunteers have responded to shifts
- schedule people for shifts that still need volunteers
- perform edits to needs and responses
- print a list of volunteers who are scheduled for any date

Note: The calendar displays shift needs and "happens on" needs. It does not display "runs until" or "ongoing" needs. For information on managing non-shift needs, see Scheduling Volunteers for Needs.

Navigating the Calendar

To access the calendar:

1. Go to your agency manager toolbar and click **Schedule**.
2. The calendar has two views: one to view the volunteers who are registered for shifts on a particular day, and another to view the shifts. Click the blue **Shifts** or **User Responses** tabs near the top of the page to select the view you want.



User Responses View:

The User Responses view lists all volunteers that are scheduled to work on a given day. If more than five users are listed for a single day, you can click the View More button to open a full listing. Icons indicate if a response was for an individual or as part of a team.

19	20
Delyla Grace	Joe Edwards
Olivia Whitman	Autum Martin
Elisabeth Donovan	Olivia Whitman
George Waters	George Waters
Judith Grasty	Josephine Brown
VIEW 1 MORE	VIEW 3 MORE

Hover your cursor over a volunteer's name (**don't click**) to view the details of the shift.

Joe Edwards
1-828-555-2222
joe@example.com

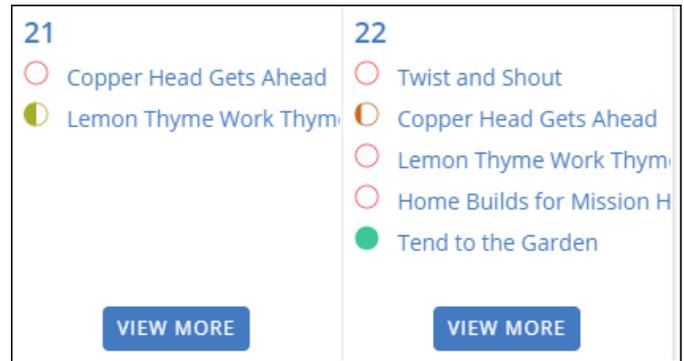
Copper Head Gets Ahead
A Cloudy Day
9:00am - 12:00pm
Team: Joe's Team

Joe Edwards
 Autum Martin

The Show Shifts View:

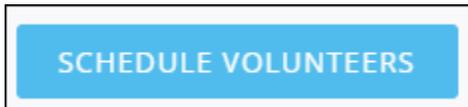
The **Show Shifts** view lists all shifts for each day in the calendar. If more than five shifts are scheduled on a single day, you can click the **View More** button to open a full listing. The icons indicate remaining capacity for a shift.

Hover your cursor over a shift to see its details, including how many slots have been filled and how many are still available. Click on a shift name to edit that shift.

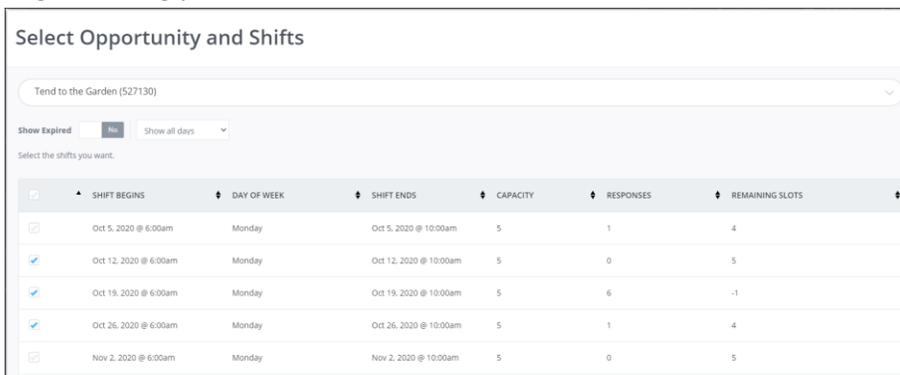
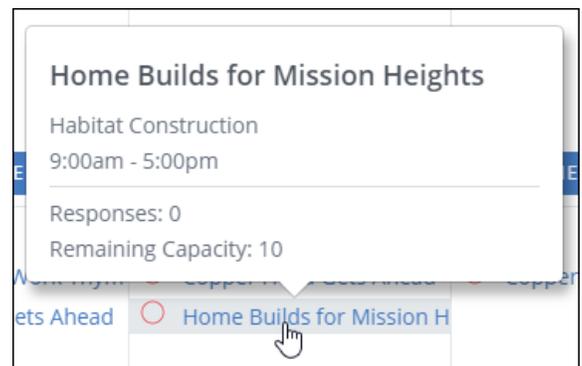


Scheduling Volunteers for a Shift

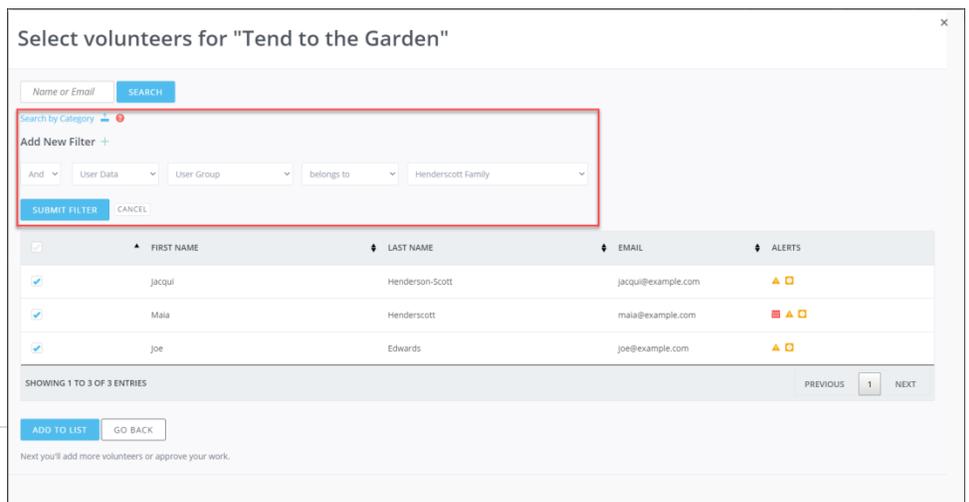
1. You begin by clicking the main Schedule Volunteers button at the top right of the calendar.



2. You will get an overlay that prompts you to pick a need/opportunity name and select shifts. After you click **Continue**, you will be taken to the page to begin building your roster.



3. You build your list of volunteers for the shifts by Searching for them by name, or Searching for them by a category, such as a User Group.
 - a. Then click **Add to List** button.



- You can review and complete scheduling these volunteers, or you can add more volunteers to the list.

Review volunteers for "Tend to the Garden"

ADD MORE VOLUNTEERS
MESSAGE VOLUNTEERS

When you have the volunteers you want, click the blue button at the bottom to complete scheduling.

FIRST NAME	LAST NAME	EMAIL	ALERTS	OPTIONS
Jacqui	Henderson-Scott	jacqui@example.com	▲ □	✉ ✎ ✕
Mala	Henderscott	maia@example.com	■ ▲ □	✉ ✎ ✕
Joe	Edwards	joe@example.com	▲ □	✉ ✎ ✕

SHOWING 1 TO 3 OF 3 ENTRIES PREVIOUS 1 NEXT

SHIFT BEGINS	DAY OF WEEK	SHIFT ENDS	CAPACITY	RESPONSES	REMAINING SLOTS
Oct 12, 2020 @ 6:00am	Monday	Oct 12, 2020 @ 10:00am	5	0	5
Oct 19, 2020 @ 6:00am	Monday	Oct 19, 2020 @ 10:00am	5	6	-1
Oct 26, 2020 @ 6:00am	Monday	Oct 26, 2020 @ 10:00am	5	1	4

SHOWING 1 TO 3 OF 3 ENTRIES PREVIOUS 1 NEXT

Send confirmation to these volunteers

SCHEDULE THESE 3 VOLUNTEERS
GO BACK

If you get a pop up with warning about conflicts or missing qualifications, you can either back up and make edits, or (in some cases) you have the ability to schedule those volunteers anyway. You **cannot** schedule a volunteer who is already scheduled for that time.

Now those volunteers are scheduled for those shifts, and you can see them on the User Responses tab of the calendar.

Once a volunteer has been registered for a shift, they'll be notified by email and in their in-app messaging inbox that they've been registered.

Note: Site managers have the same capabilities described here. If you see that a volunteer has been invited to sign up for a shift and you didn't send the invitation, it may be because a site manager (or another agency manager) has already taken this step.

Schedule users with warnings?

There are some warnings you might want to review:

- 1 user(s) has a scheduling conflict
- 3 user(s) has an availability conflict
- 3 user(s) are missing one or more required qualifications
- 1 shifts will be overbooked

You can go back to review your warnings, or schedule these users anyway.

Go back
Yes, Schedule anyway

How to Get More Volunteer Responses

Now that you've posted a new volunteer opportunities on your local Connect site, you can just sit back, relax, and wait for an onslaught of enthusiastic volunteers to started signing up by the dozen ... right?

Well, maybe not. If your Connect site already gets a lot of traffic, then your new opportunity is certainly more likely to get some views. But what if you're posting to a new site that doesn't have many users yet? What if--for whatever reason--your volunteer opportunity just doesn't generate the volume of need responses you were counting on?

There are several steps you can take to make your posted opportunities both more visible and more attractive to volunteers. Here are some tips for posting needs that will generate responses.

Think Like a Marketer

When coming up with a title for your need, it helps to think like a marketer. Avoid vague, generic titles like "Volunteers Needed" and "Help Wanted." Those titles fall into the background of the more cleverly titled needs on your site. When crafting a title, be specific and show enthusiasm if you can. Here are a few examples of real-world titles we've seen on Get Connected sites:

- Volunteer Crisis Counselors Needed - Help Make a Difference in Someone's Life!
- Tutors Needed for English Literacy and Math Students! It Feels Good to Give Back!
- Our Residents Need You!
- Be a part of something BIG! Seamster Park Playground Community Build

It also doesn't hurt to use puns or to be just a *little cheesy*. So, when you're looking for volunteers to stuff envelopes for your upcoming campaign, why not go with, "Help This Year's Campaign Be the 'Stuff of Legend!" Playing with language like this may evince a few eye rolls, but those same volunteers will be clicking on your need to learn more at the same time!

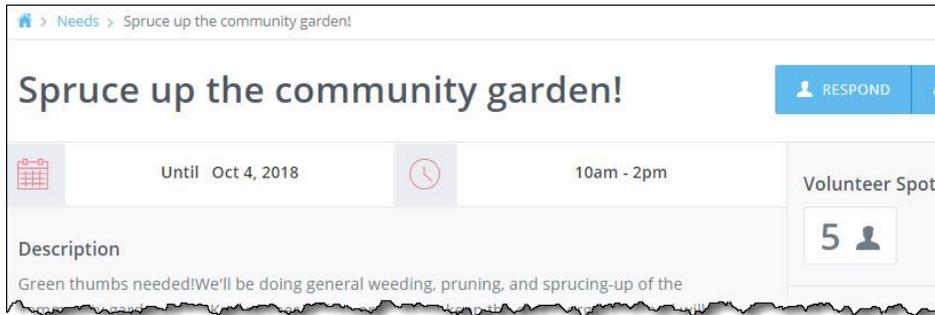
Appeal to Volunteers' Need to Make a Difference

Don't turn off your marketing mind once you've written the title. When crafting the opportunity description, don't just write what needs to be done. Explain how this volunteer job is going to help make a difference in your community. Even if you're just asking people to answer phones or stuff envelopes, make sure volunteers know the big picture. Appeal to volunteers' desire to support your cause, and they'll be happy to sign up to help!

Tip: If you're going to be providing snacks, coffee, or swag of any kind, be sure and include that information in the need posting. Volunteers want to make a difference, but adding a few perks to the job won't hurt!

Share, Share, Share!

Now that you've created an opportunity posting that volunteers can't help but check out, it's time to make sure people know it's there! The key to sharing a need is the small Share icon located on the published posting:



Click this button to see all of your sharing options.

You can share to LinkedIn, Twitter, Facebook, and Google Plus, so make sure all of your social media followers know about your great new volunteer opportunity!

Note the **Copy Link** button as well. Use it to reach out to your past volunteers and other supporters via email, your agency newsletter, or even a press release.

Keep Opportunity Postings Current

By default, your Connect platform displays the most recently added or updated needs at the top of the opportunity listing for volunteers. If you create an "Ongoing" or "Runs Until" need, be aware that it will fall lower and lower on the opportunity listing (perhaps even to page 2, or 3, or 10, depending on how active your site is!) as time goes by. Update needs occasionally to ensure that they remain in view for your site's visitors and your prospective volunteers.

Contact Your Site Manager

Your Connect platform's site manager has some tools at their disposal for promoting needs, whether a single need or a group of related needs. They can create spotlights on the volunteer dashboard, add links to the navigation menu, and send email blasts and in-app messages to your agency's fans, or to all volunteers who have indicated an interest in the cause you're promoting, or in the type of volunteer work you're asking for. Your site manager may also be a good resource of other ideas not included here. These ideas are just a start; try them out, and you may be surprised at how much more visibility your posted opportunities enjoy!

