Agency Introduction

As an Agency, you will use Volunteer Connect to recruit individuals and groups to volunteer at your organization. You can create and post descriptions of openings for volunteers to help with date-specific and ongoing tasks (opportunities), both for your organization's specific needs as well as for community events like United Days of Caring organized by Volunteer Connect. You can then follow up on and track responses from prospective volunteers (called referrals). You can also record volunteer hours completed by individual volunteers matched to your opportunities, and/or approve volunteer hours claimed by volunteers themselves.

Two other features Administrators can enable allow you to request resources from the community: **Board Connections** and **Product Connections**, which (respectively) help you find people to serve on your board and in-kind gifts to meet your organization's material needs.

In order to use Volunteer Connect, you will need to register. An Administrator will need to review and approve your registration before you can begin using your Agency account. Administrators will also review any opportunities you create before they are posted in Volunteer Connect for viewing by volunteers.

The topics in this section will help you better understand and use Volunteer Connect. They should be used in conjunction with the **Help** icons ( ) found within Volunteer Connect.

Getting Started

The primary way you will use Volunteer Connect as an Agency after your registration has been approved will be for creating and posting volunteer opportunities and following up with the volunteers that respond. This typically involves you:

Step 1: Creating a volunteer opportunity to be posted in Volunteer Connect, either for a specific organization need you are trying to fill and/or as a project for a community event. An Administrator will review your new opportunity and (if it is acceptable) approve and post it in Volunteer Connect.

Step 2: Responding to and tracking referrals from volunteers interested in the opportunity.

Step 3: Reviewing and approving volunteer hours claimed by volunteers for the opportunity, and/or logging the hours yourself (if time-tracking has been enabled by an Administrator).

Getting Help

Should you need help in using Volunteer Connect, you can contact an Administrator at Volunteer Connect. Or try watching a short video on Agency Overview.

To contact an Administrator from within Volunteer Connect:

1. Find and click on the link at the bottom of the Volunteer Connect page labeled **Contact Volunteer Connect**. This link should be available whether you are logged into your Agency account or not.
2. Select and use one of the three contact methods for contacting an Administrator: phone, email, or using the provided Web form.

You can watch a 26 minute video online:

1. Go to the website http://uwa.acrobat.com/agencytraining/
   or
1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. When Volunteer Connect displays your Agency's **myHome** page, find the **Help** tab near the top and click it.
3. Follow the link to the video http://uwa.acrobat.com/agencytraining/

Introduction to Managing Your Agency Account

As an Agency, you will work with Volunteer Connect using the tools provided in your Agency account. You obtain an Agency account by submitting a registration form to us. When the Administrator approves and activates your account, you are free to modify the information and settings in your account, begin creating volunteer opportunities, and start tracking referrals and volunteer hours.

You can make changes to your Agency account at any time. In addition, you will need to renew your Agency account after an elapsed amount of time specified by an Administrator (typically after 12 months), or your account will expire.

The topics in this section will cover registering for a new Agency account and maintaining it once it is approved and activated.

Registering/Creating an Agency Account

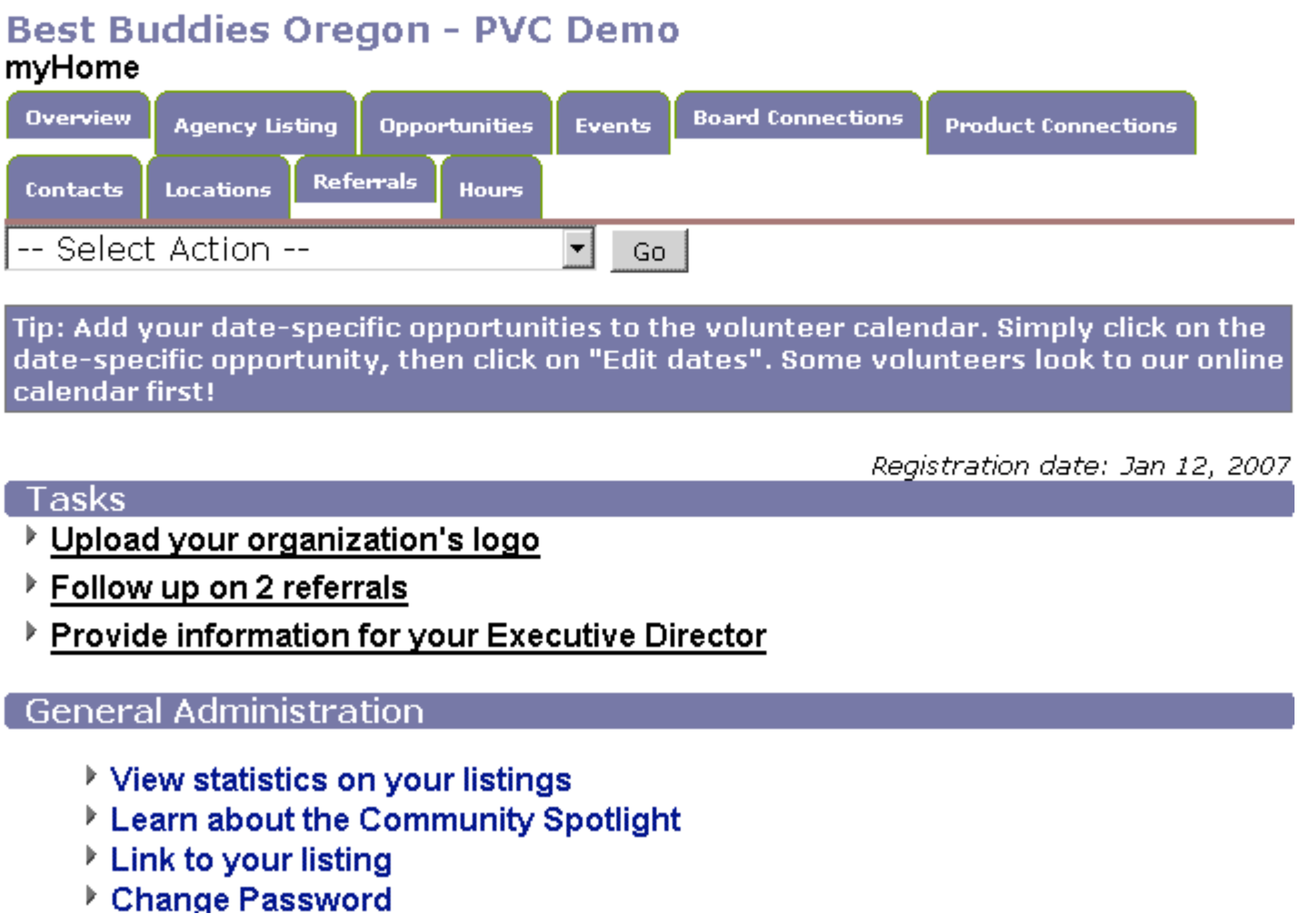
To use Volunteer Connect to recruit and manage volunteers, you will need to register your organization with Volunteer Connect. An Administrator will review your registration application, and if he/she finds it to be satisfactory, will activate your Agency account.

To register with Volunteer Connect to obtain an Agency account:

1. Go to www.volunteerconnectnow.org.
2. Find and click the link **Need Volunteers?** (it should be a red box).
3. On the **Agency Login** page, click the **Not registered? Sign up now** link.
4. Review the information provided on the **Agency Sign Up** page, then type in your organization's name in the **Agency Name** box (this is required) and click **Sign Up!**
5. Review the information displayed on the **Terms and Conditions** page, as well as the legal information obtained by clicking the **legal notices** link at the bottom of the page. If you agree to these terms of use, click **I Agree; continue**.
6. Fill in the form on the **Add Agency Listing** page with the requested information. Entries are required in certain fields; these will be marked with an asterisk (*). When finished, click **Save and continue**.
7. Volunteer Connect may offer suggestions for improving your Agency listing. If it does, and you wish to make any of the suggested changes, click **Review listing to make suggested changes**. If you do not wish to make changes, click **Continue with no additional changes**.
8. Volunteer Connect will next offer you the option of uploading your organization's logo. You can upload the logo at a later time, if you do not wish to do so now or do not have a logo prepared. If you wish to upload your logo, click the **Browse . . .** button on the **Upload logo** page, find and select the logo on your computer or network using the dialog box provided, and when returned to the **Upload logo** page click **Upload my**

logo. Note that the logo file you use must be limited to 50 kilobytes, and must be in a GIF, JPEG, or PNG file format. This means a logo size of about 200 x 200 pixels (about 2.5 inches by 2.5 inches). If you do not wish to upload your logo at this time, click **I do not want to upload a logo**.

Volunteer Connect will create a new Agency account for you and display the **Overview** tab of its **myHome** page with a note indicating that your registration will be reviewed by an Administrator before it is activated. Note that the tools and settings for your account are grouped by Volunteer Connect into several tabs Note also the **Quick Links** tool on the **Overview** tab, which provides shortcuts to commonly used Agency tools by making a selection from the drop-down menu and clicking **Go**. Finally, note the **Tasks** section of the **Overview** tab. Volunteer Connect will display links in the **Tasks** section to prompt you to take particular actions, such as updating an expiring opportunity listing or renewing your Agency account.



You can update your Agency account at any time. In addition, you will need to renew your Agency account after 12 months, after which your account will expire.

Logging in to Your Agency Account

After your Agency account has been approved, you can log into it at any time and from any computer connected to the Web.

To log into your Agency account:
1. Go to www.volunteerconnectnow.org.
2. Find and click the link **Need Volunteers?** (it should be a red box).
3. In the **Registered Agencies** section, type in the name and password you used when you registered your Agency. If you have forgotten your password, you can click the **Forgot your password?** link to have it sent to you.
4. Click **Go!**

Volunteer Connect will log you in and display your **myHome** page, from which you can manage your account settings, opportunities, referrals, and volunteer hours.

Updating Your Agency Listing

You can update the information about your organization contained in your Agency listing (the general description of your organization provided to volunteers). For example, if your organization moves its offices to a new location, you may wish to update your Agency address in Volunteer Connect.

In addition, you will be prompted by Volunteer Connect eventually to renew your Agency account, typically 12 months after creating it, or your account will expire.

To update your Agency listing:
1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. When Volunteer Connect displays your Agency's **myHome** page, find the **Agency Listing** tab near the top and click it.
3. Find the section containing the information in your Agency listing you would like to update, and click the link provided for modifying this information. For example, to change your organization's mailing address, click the **Edit Mailing Address** link in the **Mailing Address** section at the bottom of the page. If you would like to review the Agency listing as it will appear on Volunteer Connect, click the **See the listing as volunteers see it** link at the top of the page.
4. Follow the provided instructions for modifying the section of the Agency listing you wish to change.

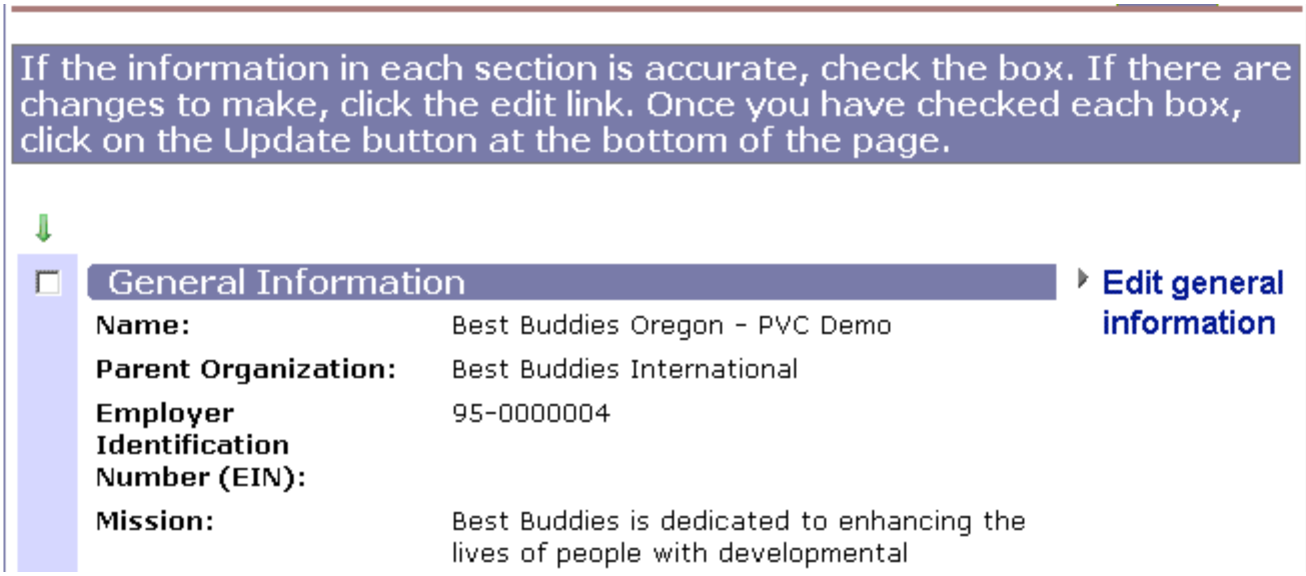
Renewing Your Agency Listing

You will be prompted by Volunteer Connect to renew your Agency listing every 12 months. If you or another Agency contact do not renew the listing, it will expire. This feature encourages Agencies to check their accounts to make sure the information is current, and keeps volunteers, board, candidates, and donors from contacting agencies whose accounts are dormant.

Volunteer Connect will prompt you to renew your listing by displaying a link in the **Tasks** section of the **Overview** tab of your Agency account displayed when you log in. You or the Agency contact that has been assigned to the Agency listing will also receive a renewal notice from Volunteer Connect by email.

To renew your Agency Account:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. When Volunteer Connect displays your Agency's **myHome** page, find the **Agency Listing** tab near the top and click it.
3. On the **Agency Listing** page, in the **General Administration** section, find and click the **update** link.
4. Review the listing information displayed. If any information is inaccurate or out of date, click the **Edit [section]** link for the section with the information you would like to modify (where **[section]** represents the section containing the information to be changed). For example, if you would like to make a change on the list of contacts, click the **Edit/Add Contacts** link (see Working with Agency Contacts for more information on working with Agency Contacts).
5. If none of the information in a section needs to be changed (or if you have made edits and have returned to the listing information page), click the checkbox provided in the upper left-hand corner of the listing.
6. Repeat Steps 4 and 5 for each section of the listing until all of the check boxes have been clicked.
7. Click the **Update** button.



Uploading Your Logo

If you did not upload a logo when you created your Agency account, you can do so at any time.

To upload your Agency's logo:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. When your Agency's **myHome** page is displayed, click the **Overview** tab (if it is not already selected).
3. Click the **Upload your organization's logo** link in the **Tasks** section.
4. Click the **Browse . . .** button on the **Upload logo** page to find and select the logo file on your computer or network using the dialog box provided. Note that the logo file you decide to use must be limited to 50 kilobytes, and must be in a GIF, JPEG, or PNG file format. This means a logo size of about 200 x 200 pixels (about 2.5 inches by 2.5 inches).
5. When returned to the **Upload logo** page, click **Upload my logo**.

Volunteer Connect will take you to the **Agency Listing** page of your Agency account and display the uploaded logo in the **Your Logo** section.

Changing Your Password

You can change the password you use to log into your Volunteer Connect Agency account.

To change your Agency password:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. When Volunteer Connect displays your Agency's **myHome** page, click the **Overview** tab (if it is not already selected).
3. Find the **Change Password** link in the **General Administration** section at the bottom of the page and click it.
4. In the **Change Your Password** page, supply your old password (for security purposes), followed by the new password you wish to use.
5. If you wish to use a password question for added security (or change the one you are currently using), in the **Password Question** section select a new question and type in the answer.
6. Click **Okay**.

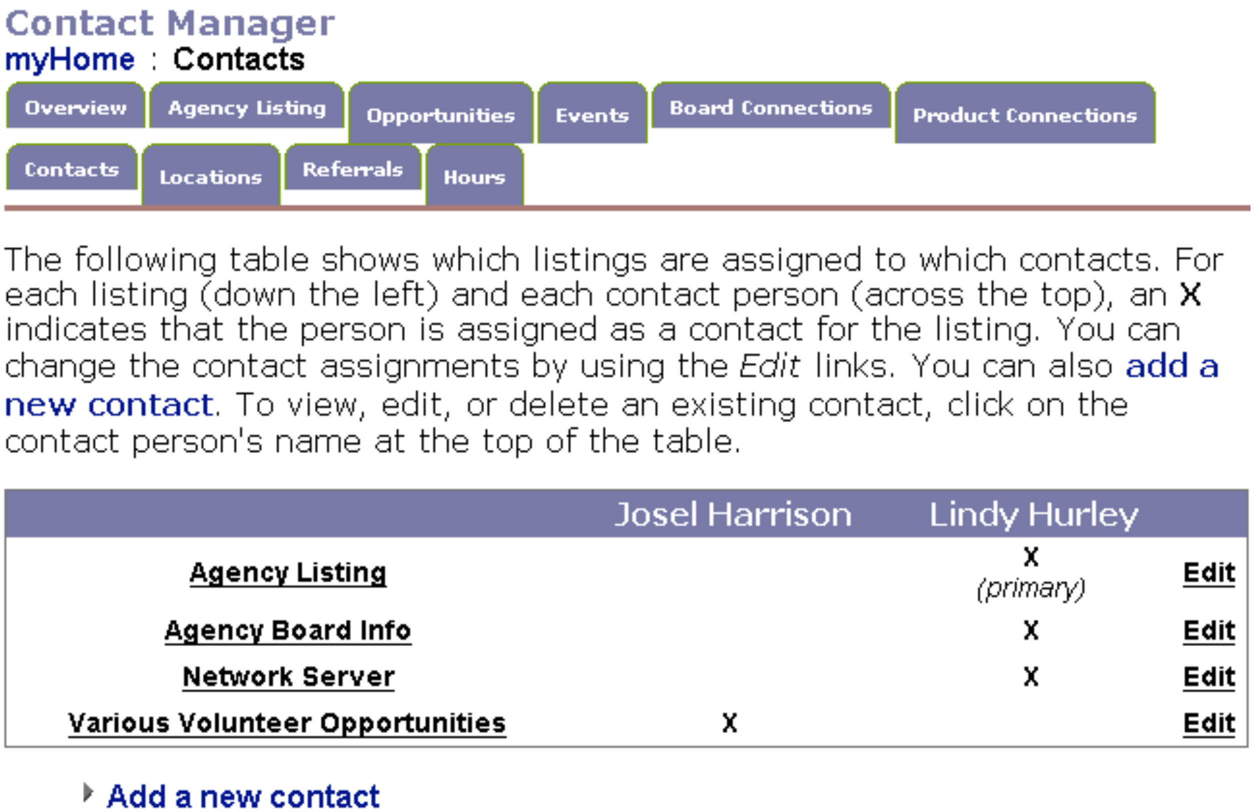
Working with Agency Contacts

The **Contact Manager** tool in your Agency account stores the names and contact information for staff members of your organization. You use the **Contact Manager** to keep track of coworkers with access to your Agency account, and/or to assign them as the primary contacts for opportunities you create.

To access the **Contact Manager**:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. When Volunteer Connect displays your Agency's **myHome** page, find the **Contacts** tab near the top and click it.

Volunteer Connect will display the **Contact Manager** for your account, which shows all available contacts and the listings they have been assigned to as the primary contact, if any (as indicated with "**X**'s"). This includes both your Agency listing, as well as individual opportunity listings.



Contact Manager

myHome : Contacts

Overview | Agency Listing | Opportunities | Events | Board Connections | Product Connections | Contacts | Locations | Referrals | Hours

The following table shows which listings are assigned to which contacts. For each listing (down the left) and each contact person (across the top), an X indicates that the person is assigned as a contact for the listing. You can change the contact assignments by using the *Edit* links. You can also add a new contact. To view, edit, or delete an existing contact, click on the contact person's name at the top of the table.

	Josel Harrison	Lindy Hurley	
Agency Listing		X *(primary)*	Edit
Agency Board Info		X	Edit
Network Server		X	Edit
Various Volunteer Opportunities	X		Edit

Add a new contact

You can use the **Contact Manager** to add, edit, or delete Agency contacts, as well as assign them to listings.

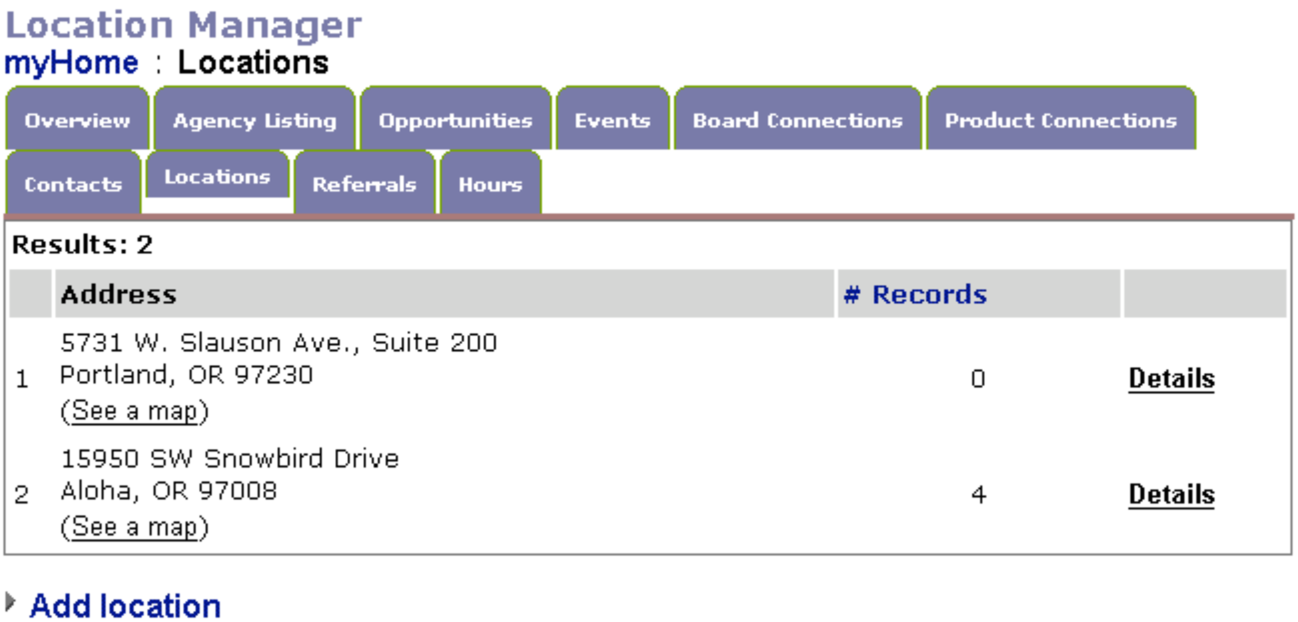
Working with Agency Locations

In addition to the main address of your organization, you can record additional addresses in your Agency account for other offices or service sites of your organization where volunteers might be placed. The **Location Manager** stores your Agency addresses and allows you to assign them as locations to listings (both the main Agency listing and individual opportunity listings).

To access the **Location Manager**:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. When Volunteer Connect displays your Agency's **myHome** page, find the **Locations** tab near the top and click it.

Volunteer Connect will display the **Location Manager** for your account, which shows all available Agency locations and the number of listings they have been assigned to.



You can use the **Location Manager** to add, edit, or delete Agency locations and assign them to listings.

Linking Your Listings to Other Web Pages

Volunteer Connect is able to create links you can use in Web pages and email messages to give volunteers and others one-click access to your Agency and opportunity listings. Volunteer Connect generates lines of **HTML** code that you copy and paste into email messages and Web-page source files that will display clickable images linking to (respectively) your Agency listing and current opportunities.

If you are unsure on how to use this feature of Volunteer Connect, you may wish to consult your organization's technical-support staff.

To obtain the HTML code needed to link to your Agency and opportunity listings:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, click the **Overview** tab (if it is not already selected).
3. Find the **Link to your listing** link in the **General Administration** section and click it.

Volunteer Connect will display two sets of HTML code; the top one will link to your Agency listing, and the bottom one will link to your opportunities. You can highlight and copy the code for the listing(s) you would like to embed a link to and paste it into email messages and the source files of Web pages.

Viewing Listing Statistics

Volunteer Connect can track and display for you the number of "hits" (or online visits) your Agency and opportunity listings receive. This lets you determine how visible your organization and opportunities are within Volunteer Connect and which opportunities seem to be most popular with prospective volunteers.

To view the tracking statistics for your Agency and opportunity listings:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, click the **Overview** tab (if it is not already selected).
3. Find the **View statistics on your listing** link in the **General Administration** section and click it.

Introduction to Creating and Managing Opportunities

Opportunities are descriptions of date-specific and ongoing tasks at your organization for which you would like to recruit volunteers. You use your Agency account to create and submit opportunities, which are reviewed by a Volunteer Center Administrator and then posted in Volunteer Connect for volunteers to see.

Opportunities you and your colleagues create are stored in a table on the **Opportunities** page of your Agency account. The opportunities can be filtered using the links at the top of the table to display only **Active Opportunities**, **Inactive Opportunities**, and **All Opportunities**. The **Inactive Opportunities** list contains opportunities that have not yet been approved by an Administrator, opportunities you have disabled, and date-specific opportunities that have expired.

Aquarium of the Pacific - PVC Demo - Opportunities

myHome : Opportunities

Overview | Agency Listing | Opportunities | Events | Contacts | Locations | Referrals | Hours

[Active Opportunities | Inactive Opportunities | All Opportunities]

Results: 4

Headline	Approval Status	Creation Date	Last Modified	Expires	Type	
Aviculturalist Volunteer	Approved	Jan 12, 2007	Feb 23, 2007	Feb 23, 2008	Ongoing	Details
Education Volunteer: Interpretation & Presentation	Approved	Jan 12, 2007	Jan 12, 2007	Jan 12, 2008	Ongoing	Details
Gift Store Volunteers	Approved	Jan 12, 2007	Jan 12, 2007	Jan 12, 2008	Ongoing	Details
Guest Services Volunteer	Approved	Jan 12, 2007	Jan 12, 2007	Jan 12, 2008	Ongoing	Details

- Add a Date-specific Opportunity
- Add an Ongoing Opportunity

Volunteers will inquire about the opportunities by phone, email, or fax, which you can track as **referrals**. If a volunteer is matched to an opportunity, you can track the hours he or she volunteers for it, and/or review and approve volunteer hours claimed for the opportunity by the volunteer him- or herself.

Creating a Volunteer Opportunity

Opportunities are created in Volunteer Connect as either **date-specific** or **ongoing** activities. As their names imply, date-specific opportunities are tied to one or more specific dates and expire when their dates have elapsed, whereas an ongoing opportunity is a task for which you need volunteer assistance on a continual basis that remains posted in Volunteer Connect until you disable or delete it.

The process for creating opportunities is essentially the same for both types of opportunities, with the exception of date-specific opportunities requiring you to select one or more dates on which the opportunity will be offered. You can change a date-specific opportunity to an ongoing one and vice versa later on, if necessary.

To create an opportunity:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Opportunities** tab and click it.
3. Depending on the type of opportunity (date-specific or ongoing) you wish to create, click either the **Add a Date-specific Opportunity** link or the **Add an Ongoing Opportunity** link.
4. Supply the information requested in the fields provided in the **Add opportunity** pages, clicking **Save and Continue** to move between pages. Note that fields marked with an asterisk (*) are required. Note also that on the first page (**General Information**) you will be prompted to assign a contact and location to the listing using the drop-down menus provided. If you wish to assign a contact and/or location not currently listed in the menus, select **Another Person** or **Another Location** and you will be prompted later in the opportunity-creation process to supply the new contact and/or location (see Working with Agency Contacts and Working with Agency Locations for more information about Agency contacts and locations).
5. When you reach the **Geographic location** page, specify whether the opportunity is offered only at the location you specified in Step 4, or is available at multiple locations. If the opportunity will only be offered in the location specified when you began creating its listing, click **No - only this location is available**. If the opportunity will be offered in multiple locations, click instead **Yes, more than one physical location is available**, after which you will be prompted to provide additional location information and click **Save and Continue**.

When finished, Volunteer Connect will display the **Registration Complete** page for the new opportunity, which notes that your opportunity will appear in Volunteer Connect once an Administrator has viewed and approved it.

Opportunity listings to expire after 6 months. Volunteer Connect will prompt you to update the listing by displaying a link in the **Tasks** section of the **Overview** tab of your Agency account.

Modifying a Volunteer Opportunity

You can make changes to volunteer opportunities after they are created. The instructions in this topic will describe how to make most of the changes you are likely to make to an opportunity. Some specific changes to opportunities can be made in other ways, and are described in other topics. For example, see Changing Opportunity Types (Date-Specific and Ongoing) for changing a date-specific opportunity to an ongoing one (and vice versa); Assigning Contacts to Listings for changing contacts for an opportunity using the **Contact Manager**; and Assigning Locations to Listings for changing locations for an opportunity using the **Location Manager**.

To modify an opportunity:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to modify in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired, is disabled, or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. When the **Details** page for the opportunity is displayed, find the section containing the opportunity information you would like to change and click its **Edit** link. For example, to edit the general information of the opportunity (such as the description or requirements), click the **Edit General Information** link in the **General Information** section.
5. Make the desired changes on the pages provided and click **Save and Continue** (or **Continue**) when finished.

Changing Opportunity Types (Date-Specific and Ongoing)

You can change a date-specific opportunity to an ongoing one and an ongoing opportunity to a date-specific one. If you change an ongoing opportunity to a date-specific one, you will need to assign one or more dates to the opportunity (described in Step 6 below).

To change the opportunity type:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Opportunities** tab and click it.

3. On the **Opportunities** page, find the opportunity you would like to change the type of in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired, is disabled, or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. If the opportunity is currently a date-specific opportunity, on its **Details** page you will see a link labeled **Turn into an ongoing opportunity**. If it is an ongoing opportunity, you will see instead a link labeled **Turn into a date-specific opportunity**. Click this link.
5. When the **Type changed** page is displayed, click the **Back to the opportunity administration** link. You will be taken back to the **Details** page for the opportunity.
6. If you have changed a date-specific opportunity to an ongoing one, you are finished (unless you need to change other information or settings for the opportunity; see Modifying a Volunteer Opportunity for more information). If you have changed an ongoing opportunity to a date-specific one, you will need to assign one or more dates to the opportunity. On the **Details** page for the opportunity, find the **Upcoming Dates** section, click the **Edit dates** link, and then click the **Add a date** link on the **Event dates** page. Follow the instructions on the **Choose dates** page to select one or more dates for your opportunity.

Copying a Volunteer Opportunity

Volunteer Connect allows you to make copies of your opportunities. This can help you save time and effort when creating new opportunities by importing information from existing ones.

To copy an opportunity:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to copy in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired, is disabled, or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. When the **Details** page for the opportunity is displayed, click the **Create a copy of this opportunity** link.
5. In the **Create a copy** page, you will be prompted to specify which, if any, opportunity information you would like to synchronize between the original opportunity and the copy or copies you are making. This enables you to

make changes to the original opportunity or a copy and have the information updated in both at the same time. If you would like to create a completely new and separate copy (or are unsure if you want the original and copy or copies synchronized), select **No** for all options.
6. Click **Create copy**.
7. When the **Listing Copied** page is displayed, click **View original listing** to be returned to the **Details** page for the original opportunity, or **View copy** to be taken to the **Details** page for the copy.

Disabling a Volunteer Opportunity

You can disable an opportunity, which removes it from viewing by volunteers but saves its information if you would like to restore it later. For example, if you have an opportunity that has a recurring need for volunteers, you can disable it once you have recruited enough volunteers for the present time and restore it later when you need to recruit the next group.

To disable an opportunity:
1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to disable in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. When the **Details** page for the opportunity is displayed, click the **Disable this listing** link.
5. On the **Disable opportunity** page, click **Yes, disable this opportunity**.

Volunteer Connect disables the opportunity and moves it to the **Inactive Opportunities** section of the table of opportunities on your **Opportunities** page.

Deleting a Volunteer Opportunity

You can remove from Volunteer Connect opportunities that are no longer used or wanted.

To delete an opportunity:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to delete in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired, is disabled, or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. When the **Details** page for the opportunity is displayed, click the **Erase this listing** link.
5. On the **Delete opportunity** page, click **Yes, delete this opportunity**.

Introduction to Referrals

When a volunteer, board candidate, or donor is interested in a listing you have posted in Volunteer Connect, he or she will get in touch with you to learn more about it. This initial contact is known as an **inquiry** to the sender and as a **referral**.

If a volunteer, candidate, or donor inquires about one of your listings using the inquiry form provided by Volunteer Connect, an email notification will be sent to you (or a colleague if he/she was set as the primary contact for the listing) and the referral will be recorded on the **Referrals** tab of your Agency account.

The topics in this section will focus on working with email referrals received through Volunteer Connect. However, you should also have (if you do not already) a process in place for tracking, following up on, and managing referrals that come to you by phone, fax, or non- Volunteer Connect -generated emails.

Tracking Referrals

The **Referrals** tab in your Agency account tracks referrals submitted by volunteers for your opportunity listings, making it easy for you to track and manage them.

To display your Agency's referrals:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Referrals** tab and click it.

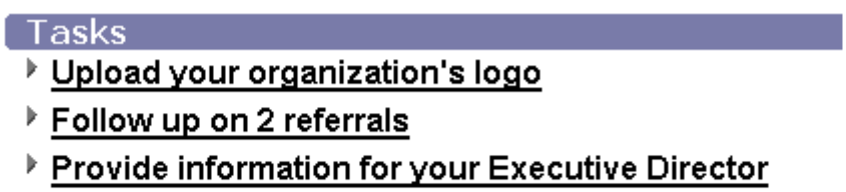
The **Referrals** tab displays a table containing your Agency's referrals, which can be sorted within the columns provided by clicking the column headings at the top. You can also filter the referrals using the drop-down menus provided above the table. These tools will be helpful for finding and managing records when your Agency account starts to accumulate large numbers of referrals.

From the **Referrals** tab you are able to follow up on referrals by email, track and change the status of referrals, and download referral records.

Following Up on Referrals

Referrals from volunteers, board candidates, and donors should be followed up on promptly. If they have sent their inquiries via email using a form provided by Volunteer Connect, Volunteer Connect will capture and store the messages so that you can easily track and respond to them.

The easiest way to access new referrals is by clicking a link Volunteer Connect supplies in the **Tasks** section of the **Overview** tab of your Agency account when you are logged in. Volunteer Connect will display a link labeled **Follow up on [number] referral(s)**, where **[number]** represents the number of referrals awaiting review and response.



New referrals are also accessible on the **Referrals** tab of your Agency account.

To follow up with a volunteer using the **Referrals** tab of your Agency account:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Referrals** tab and click it.
3. On the **Referrals** page, scan the table of referrals for records that have **Inquired** displayed in the **Inquiry Status** column. When you find one, click the email address of the volunteer provided in the **Email address** column. This will open up your default email application and address a new message to the volunteer. If clicking the link does not open your preferred email application, or does not work, you can also open your preferred email application first and then copy and paste the address provided into it (you can click the **Details** link for the referral to get the full email address of the volunteer if it is cut off in the table of referrals).

4. Repeat as many times as necessary until you have responded to all new referrals.

Once you have responded to a referral, you may want to update its record on the **Referrals** tab to track progress on placing the volunteer (see Tracking Referrals and Changing Referral Status for instructions on how to do so).

It is important that you respond to referrals promptly. This is true even in cases where you no longer need volunteers for an opportunity or are not interested in a particular volunteer. A prompt response to a volunteer inquiry builds goodwill and encourages the volunteer to return to you when other opportunities become available and/or recommend you to other volunteers.

Changing Referral Status

Each referral tracked by Volunteer Connect on the **Referrals** tab is assigned an **Inquiry Status** setting that allows you to indicate at which step you are in moving a referral from inquiry to completion. New referrals are automatically set to **Inquired** by Volunteer Connect when they are submitted by volunteers, board candidates, and donors. Volunteer Connect will also automatically mark referrals older than three months as **Expired**. Once you follow up on and start tracking a referral, you can change its status to **Active**, **Complete**, and **Not interested**.

To change the status of a referral:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Referrals** tab and click it.
3. Find the referral(s) you would like to change the status of. If you have a large number of referrals, or if you would like to change the status of several referrals at once, you may need to sort the table by clicking the column heading you would like to sort by or filter it using the filter drop-down menus above the table.
4. Select the opportunity(ies) you would like to change the status of by clicking its/their check box(es) in the first column of the table.
5. Select a status setting from the **Change all checked referrals to** drop-down menu and click **Go**.

Note that you can also change the status of individual referrals by clicking the **Details** link on the right side of their entries in the table of referrals and then clicking the **change** link for the **Status** setting in the referral's **Referral Details** page.

Downloading Referral Records

You can download referral records from Volunteer Connect for tracking and reporting purposes. You can **export** your Agency's referral records in several formats (including Microsoft Excel, **CSV**, and **HTML**), which is helpful if you would like to be able to manipulate the referral records in a spreadsheet or database. You can also have Volunteer Connect generate a **PDF** file containing all referrals for printing.

To download referral records from your Agency account:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Referrals** tab and click it.
3. If you wish to arrange referrals prior to downloading and/or select specific records to be downloaded, make adjustments and selections using the sorting and filtering tools provided (the clickable column names and the filtering drop-down menus).
4. If you would like to export the referral records (which allows for their manipulation in worksheets and databases), click the **Export records to CSV** link and follow the instructions for exporting the referrals in a download format you select. If you would like Volunteer Connect to create a PDF file of the referrals displayed, click the **Create PDF** link in the top row of the table and follow the instructions for generating the PDF.

Using Volunteer Event Management

Volunteer Connect offers a tool called **Volunteer Event Management** (**VEM**, which may also be referred to in Volunteer Connect as **VEM2**) that allows Volunteer Center Administrators to plan and manage events involving large numbers of Agencies and volunteers (such as "service weeks" or "volunteer days"). As an agency, you may be asked or required by an Administrator to create opportunities specifically for the event. These event-specific opportunities are known as **projects**, and are managed somewhat differently than other opportunities you create.

Adding Projects to an Event (day of caring only)

Agencies or the Volunteer Connect can add projects to a current event.

To add a project to an event as an agency:
1. Login as an agency
2. Select the Events tab
3. Select the Details and Project Sign Up link next to the desired event under the "Current Events" area.
4. Select the Add a Project link

Fill in the Project Details summarized below

1. Title – Name of project. This will appear to the volunteers when they register for a project.
2. Description - Enter a detailed description of this particular project. Volunteers will read your description as they register for this project.
3. Limit to one time slot? - If you choose to limit a project to one time slot, any alternative time slots will be inactivated when the first volunteer registers. For example, say you set up your project with two time slots: Friday morning and Saturday morning. Initially, both time slots will be made available to volunteers. If the first volunteer chooses to sign up for Saturday morning time slot, the Friday morning time slot will immediately be deactivated. If, instead, the first volunteer chooses to sign up for Friday morning, the Saturday time slot will be deactivated.
4. Primary Contact - Select from the list of project contacts the person who will be the primary contact for the project. You can create a new contact by selecting "another person".
5. Project Location - Enter the location of the project. You can enter a new location by selecting "another location". You can also choose to not enter one at this time by selecting "Address is to be decided".

Adding Time Slots to a Project (day of caring only)

Attached to projects are associated time slots that volunteers can register for.

Note that each time slot has its own details that need to be filled in, summarized below.
The first time you add a project to an event you will be placed in the time slot details screen to fill in the details of the first time slot for the project.

Time Slot Details

6. Slot Date: Pick the date to add the time slot to. The list that appears comes from the event dates. (Note: you can select More Dates to add a new date to the event).
7. Start time
8. End time
9. Number of openings: Enter how many volunteers can participate.

To add an additional time slot to an existing agency project:
1. Select the Event tab.
2. Select details next to the desired project.
3. Select View Time Slots
4. Select Add Time Slot.

Viewing Project Participants (day of caring only)

To view the participants for an existing agency project:
1. Login as an Agency
2. Select the Events tab
3. Select the Participants link next to the desired project on the Events tab.

Note that you can email an existing participant by clicking on the participants email address

Viewing Project Registrations (day of caring only)

To view the registrations for an existing agency project:
1. Login as an Agency
2. Select the Events tab
3. Select the Registrations link next to the desired project on the Events tab.

Introduction to Managing Volunteer Hours

You can track the hours volunteers work on the opportunities they are matched to. Volunteer hours can be logged by volunteers themselves by submitting a claim for hours worked on a particular opportunity, which you will have a chance to review and approve before they are posted in Volunteer Connect. You can also log hours for a volunteer using the referral record that matched him or her to the opportunity, and/or by using the **Hours** tab of your Agency account.


American Cancer Society -- Portland - PVC Demo - Volunteer Hours

myHome : Hours

Overview | Agency Listing | Opportunities | Events | Contacts | Locations | Referrals | Hours

Filters

Status: All

Filter

Export records to CSV

Total hours: 5

Results: 1 | Create PDF

		Status	Entered On	Listing	Name	Email	Date	# Hours	
☐	1	Approved	Feb 23, 2007	Volunteer D. . .	Erich Stiefvater	estiefvater@hotmail.co...	Jan 22, 2007 to Feb 20, 2007	5.00	Details

-- Select Action -- | Do

The **Hours** tab offers sorting and filtering tools (the clickable column headings in the table of entries and the **Filters** section above it) to help you find specific hours-log entries and/or manage large numbers of entries. You can use the **Hours** tab to edit and/or delete hours-log entries of volunteers, as well as download records of volunteer hours.

Approving Volunteer Hours

One way in which volunteer hours are recorded in Volunteer Connect is by volunteers submitting a claim for hours worked on opportunities. Volunteer

Connect will notify you when a volunteer makes a claim for hours and give you a chance to review and approve them before they are posted.

To approve hours submitted by a volunteer:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, click the **Overview** tab (if not already selected).
3. Click the link in the **Tasks** section labeled **Approve hours for [number] entry(ies)**, where **[number]** represents the number of volunteers making claims for hours.
4. Review the hours claim(s) listed in the table on the **Volunteer Hours** page. If you wish to change the number of hours a volunteer is claiming before approving his or her claim, click the **Details** link on the right side of the entry and follow the instructions in Editing an Hours-Log Entry.
5. To approve a single hours claim, click the **Approve** link found in the claim's **Status** column, and then click **Approve 1 log entry** in the **Approve Log Entry** page that is displayed. To approve multiple hours claims, select the claims you would like to approve by clicking their checkboxes in the first column of the table, change the **Select Action** drop-down menu to **Approve**, and then click **Do**.

Logging Hours for a Volunteer

A second way in which volunteer hours are recorded in Volunteer Connect is for you to log the hours on behalf of a volunteer. If the volunteer has not already claimed hours themselves, you will need to create an initial entry using the referral record that matched them to the opportunity they volunteered on. Subsequent hours can be logged for the volunteer using the **Hours** tab in your Agency account (see Logging Additional Volunteer Hours for details).

To create a new hours log entry for a volunteer:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Referrals** tab and click it.
3. Find the referral record for the volunteer you wish to log hours for in the table of referrals. The status of the referral must be set to either **Active** or **Complete** before you can log hours (see Changing Referral Status for more information).
4. Click the **Details** link on the right side of the referral entry.
5. In the **Timecard** section of the referral's **Details** page, click the **Log additional hours** link.
6. Type in the requested information and click **Okay**.

You can now use the **Hours** tab of your Agency account for recording additional volunteer hours.

Editing an Hours-Log Entry

You can make changes to a volunteer's hours-log entry using the **Hours** tab of you Agency account; specifically, you can edit the entry's dates and/or number of hours completed.

To modify an hours-log entry for a volunteer:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Hours** tab and click it.
3. Find the hours-log entry for the volunteer you would like to edit and click the **Details** link on the right side of its entry.
4. On the **Log entry details** page, click the **Edit this log** entry link.
5. Make the desired changes to the log and click **Okay**.

Deleting Volunteer Hours

You can delete an hours-log entry for a volunteer.

To delete an hours-log entry:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Hours** tab and click it.
3. Find the hours-log entry for the volunteer you would like to delete and click the **Details** link on the right side of its entry.
4. On the **Log entry details** page, click the **Erase this log entry** link.
5. On the **Erase hours** page, click **Yes, erase these hours**.

Downloading Records of Volunteer Hours

You can download hours-log records from Volunteer Connect for tracking and reporting purposes. You can **export** all of your Agency's hours-log entries in several formats (including Microsoft Excel, **CSV**, and **HTML**), which is helpful if you would like to be able to manipulate the records in a spreadsheet or database. You can also have Volunteer Connect generate a **PDF** file containing all hours-log records displayed in the table of entries on the **Hours** tab for printing.

To download hours-log records from your Agency account:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. On your Agency's **myHome** page, find the **Hours** tab and click it.
3. If you wish to arrange the hours-log entries prior to downloading and/or select specific records to be downloaded, make adjustments and selections using the sorting and filtering tools provided (the clickable column names and the filtering drop-down menu.
4. If you would like to export the records (which allows for their manipulation in worksheets and databases), click the **Export records to CSV** link and follow the instructions for exporting the records in a download format you select. If you would like Volunteer Connect to create a PDF file of the entries displayed for printing, click the **Create PDF** link in the top row of the table and follow the instructions for generating the PDF.

Introduction to Board Connections

In addition to recruiting volunteers, you may be able to use Volunteer Connect add-in feature to help you seek and recruit individuals to serve on your board using **Board Connections**.

Posting Agency Board Information

Before you can create board position listings, you must first provide Volunteer Connect with information about your Agency's board.

To post your Agency's board information:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. When your Agency account is displayed, find and click the **Board Connections** tab.
3. On the **Board Connections Positions** page, in the **Agency Board Connections Information** section, click the **Add Board Connections information** link.
4. Provide the information requested in the form on the **Board Connections Info** page using the fields and settings provided and click **Okay**. Note that fields marked with an asterisk (*) are required. Note also that you will be prompted to assign a primary contact to manage Board Connections information and communications using the drop-down menu provided. If

you wish to assign a contact not currently listed in the menu, select **Another Person** and you will be prompted later to supply the new contact (see Working with Agency Contacts for more information about Agency contacts).

Volunteer Connect will store the information provided and return you to the **Board Connections** tab of your Agency account, which will now provide links you can use to edit or delete your board information. You can also now create and manage listings for your open board positions.

Creating Board Position Listings

To recruit board members using Board Connections, you create listings for board positions that candidates can review and respond to. These listings must be approved by an Administrator before they will appear in Volunteer Connect.

To create a board position listing:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. When your Agency account is displayed, find and click the **Board Connections** tab.
3. On the **Board Connections Positions** page, in the **Board Connections Positions** section, click the **Add a Board Connections position** link.
4. On the **Create Board Connections Position** page, provide the information requested in the form using the fields and settings provided and click **Save and Continue**. Note that fields marked with an asterisk (*) are required. Note also that you will be prompted to assign a contact and location for the listing using the drop-down menus provided. If you wish to assign a contact and/or location not currently listed in the menus, select **Another Person** or **Another Location** and you will be prompted later in the listing-creation process to supply the new contact and/or location (see Working with Agency Contacts and Working with Agency Locations for more information about Agency contacts and locations).
5. Volunteer Connect may offer suggestions for improving your positing listing. If it does, and you wish to make any of the suggested changes, click **Review listing to make suggested changes**. If you do not wish to make changes, click **Continue with no additional changes**.

Volunteer Connect saves and displays the **Registration Complete** page for the position listing and notes that an Administrator will review it. You can use the links on the **Registration Complete** page to view the listing you just created as board candidates will see it, manage (edit or delete the new listing, and create additional listings.

Responding to Donation Inquiries

Once you have created a listing for a needed item and an Administrator has approved it, it will be posted in Volunteer Connect for public viewing. Donors will review the listing, and if interested will submit via email **inquiries** (referred to in your Agency account as **referrals**) that express their willingness to donate the item. You or another Agency contact should follow up on needed-item referrals in a timely fashion to facilitate the donation or let donors know that the need has been filled.

Volunteer Connect tracks inquiries/referrals for a needed-item listing on the **Details** page of the listing, found in the **Your Needed Items** page of the **Product Connections** tab of your Agency account.

To view and respond to needed-item inquiries:

1. Log in to your Agency account (see Logging in to Your Agency Account instructions, if needed).
2. When your Agency account is displayed, find and click the **Product Connections** tab.
3. On the **Product Connections** page, find and click the **Needed Items** link (if the **Your Needed Items** page is not already displayed).
4. On the **Your Needed Items** page, review the needed-item listings in the table. A needed-item listing that has received one or more inquiries will display the number received in its "**# Inquiries**" column.
5. Click the **Details** link at the right side of a listing that has received one or more referrals.
6. When the **Details** page for the listing is displayed, scroll down to the **Referrals for this item** section and review the referrals listed. To review a referral in greater detail, click the **Details** link at the right side of its entry.
7. To respond to an inquiry, click the email address of the donor. This will open up your default email application and address a new message to the donor. If clicking the link does not open your preferred email application, or does not work, you can also open your preferred email application first and then copy and paste the address provided into it.
8. Repeat Steps 5 through 7 as many times as necessary until you have responded to all new needed-item referrals.

Note that you can also find and display needed-item referrals on the **Referrals** tab of your Agency account. Volunteer Connect will also provide a shortcut for accessing Product Connections and other referrals needing follow up through a link in the **Tasks** section of the **Overview** tab of your Agency account when you log in titled **Follow up on [number] referral(s)** (where **[number]** represents the number of referrals requiring review).

Note also that when you display the **Details** page for a needed-item referral (as described in Step 6 above) you can change the referral's status by clicking the **change** link to the right of its **Status** setting. This allows you to track a donation from initial inquiry through to completion.

Tracking Board Position Inquiries

Inquiries from candidates for your board-position listings are treated as **referrals** by Volunteer Connect, and are stored and tracked on the **Referrals** page of your Agency account (along with referrals for volunteer-opportunity and Product-Connections listings), making it easy to follow up on and manage them.

To display the **Referrals** page to manage board-position referrals:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. When your Agency account is displayed, find and click the **Referrals** tab.
3. On the **Referrals** page, scan the table of referrals for inquiries from candidates for board-position listings.

Once you locate a referral for a board position, you can respond to it and update its status (see Changing Referral Status for instructions). You can also log hours on the referral, although hours-logging is intended primarily for tracking volunteer hours on opportunity listings.

Note that Volunteer Connect will also provide a shortcut for accessing Board Connections and other referrals needing follow up through a link in the **Tasks** section of the **Overview** tab of your Agency account when you log in titled **Follow up on [number] referral(s)** (where **[number]** represents the number of referrals requiring review).

Viewing Board Position Statistics

Volunteer Connect can track and display the number of "hits" (online visits) your board-position listings receive. This lets you determine how visible the listings are to potential candidates and gauge their interest.

To view the tracking statistics for your board-position listings:

1. Log in to your Agency account (see Logging in to Your Agency Account for instructions, if needed).
2. When your Agency account is displayed, find and click the **Overview** tab (if it is not already displayed).

3. Find the **View statistics on your listings** link in the **General Administration** section and click it.
4. On the **Statistics** page, observe the number of hits for each board-position listing in the **Board Position Stats** section.

Introduction to Product Connections

If enabled by an Administrator, **Product Connections** is a Volunteer Connect feature that helps you seek and obtain donated goods and services from volunteers and members of the public (called **donors**). You can browse donated items listed by donors themselves and claim them using the **Claim Donation**. You can also create and manage needed-item listings using the **Posted Needs** form to solicit the donation of specific items you need.

If Product Connections is available for use, you can access it by clicking a tab in your Agency account after logging in. Depending on Administrator preferences, this tab may be labeled **Product Connections**.

Browsing Donated Items

You can obtain donated goods and services for your Agency two ways: by using needed-item listings [make link to managing needed-item listings] that solicit specific donations you are looking for, and by browsing and claiming [make link to claiming donated items] items posted by donors. You may wish to browse this list of available donations before creating a needed-item listing to see if what you are looking for is already available.

To browse the list of donations posted by donors:

1. Log in to your Agency account (see Logging in to Your Agency Account instructions, if needed).
2. When your Agency account is displayed, find and click the **Product Connections** tab (or whatever title the Administrator has selected).
3. On the **Product Connections** page, find and click the **Available Items** link.
4. On the **Browse Available Items** page, use the browsing tools provided to view review available donations displayed in summary format. For example, you can filter the list of donations to find items from donors close to you by using the **Select a region** drop-down menu. You can also browse the donated-item listings by using the alphabet organizer, search for specific items using the **Find an item** search tool, or view all items or items by category using the **Browse All** and **By Category** links provided.
5. When you see a donated-item listing you would like to view in greater detail, click its title or the **more** link at the end of its listing.

Once you find a donated item you would like to have, you can claim it.

Claiming Donated Items

Once you have browsed for and found a donated item you would like to acquire and displayed its full listing, you can claim the item using the **Claim Donation** form.

To claim a donated item:
1. Following the instructions in Browsing Donated Items, find the listing for the item you would like to claim and display its full text.
2. Find and click the link labeled **Claim this donation** at the bottom of the listing.
3. On the **Claim Donation** page, review the information displayed in the **Claim Donation** form and make any needed or desired changes.
4. Click the **Claim this donation** button.

Volunteer Connect emails the information in the **Claim Donation** form to the owner of the donated item as an **inquiry**, after which it is up to you and the donor to coordinate the transfer of the item. To help keep tabs on the status of the donation, you can track your inquiry using the **Product Connections** tab of your Agency account.

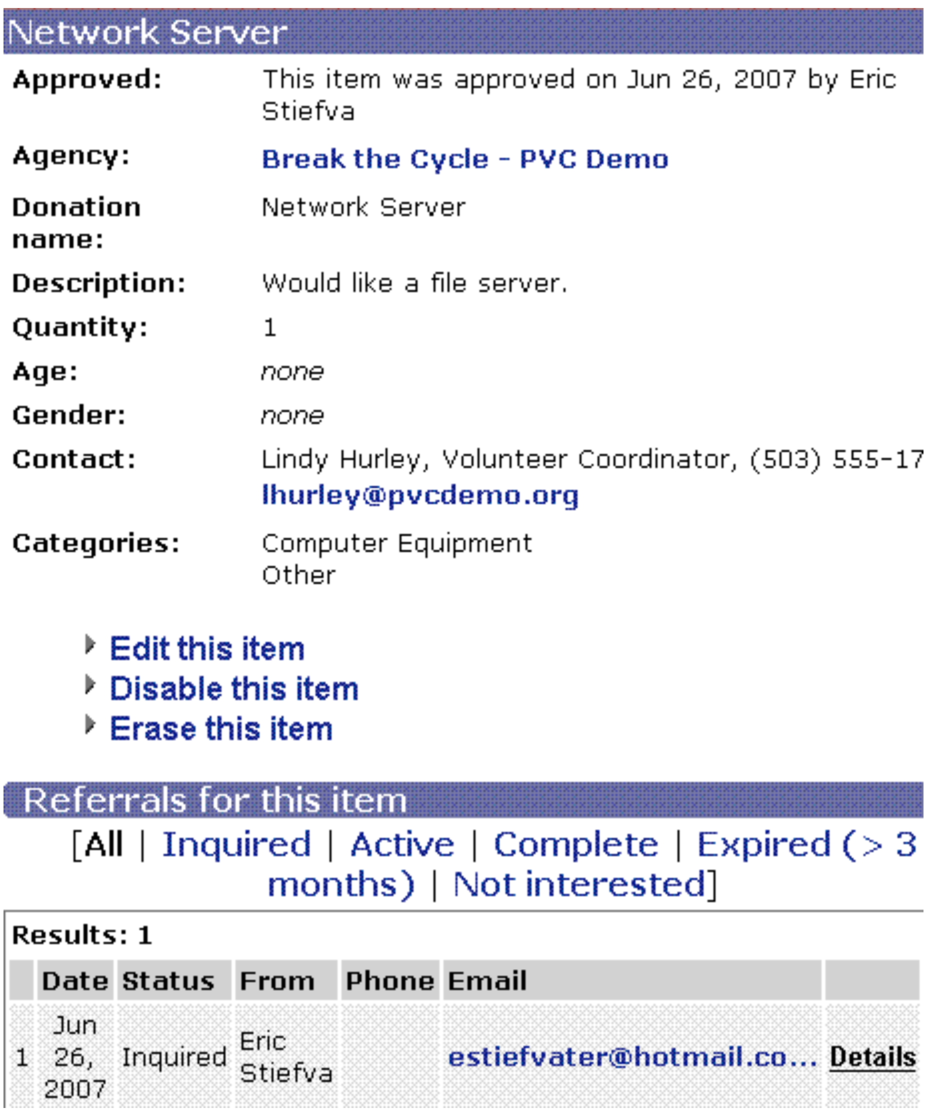
Tracking Donated Items

You can track inquiries you have made on donated items to follow up with the donors to coordinate the transferal of the items.

To track inquiries you have made on donated items:

1. Log in to your Agency account (see Logging in to Your Agency Account instructions, if needed).
2. When your Agency account is displayed, find and click the **Product Connections** tab (or whatever title the Administrator has selected).
3. On the **Product Connections** page, find and click the **Your Inquiries** link.
4. Review the table of inquiries you have submitted for donated items. To view an inquiry record in full, click the **Details** link on the right side of its entry.

The inquiry record keeps track of the record of correspondence(s) between you and the donor of the item to help facilitate the tracking and transferal of the item.



Managing Donation Email Alerts

You can configure Product Connections to notify you and/or other Agency contacts by email when donors post new donated-item listings. This allows you to stay up to date on donations that are available.

Note that you do not need to configure notification options for needed-item listings. Once you create a needed-item listing and an Administrator approves it, Volunteer Connect will collect any email inquiries sent by donors automatically. See Responding to Donation Inquiries for instructions on how to access, respond to, and manage these needed-item inquiries.

See Subscribing to Donation Email Alerts and Adding a Donation Email Subscriber for instructions on adding (respectively) yourself and others to receive donation email alerts, and Deleting a Donation Email Subscriber for instructions on how to remove yourself or others from the donation-email-alert list.

Managing Needed-Item Listings

In addition to browsing and claiming items offered by donors, you can proactively solicit donations of specific goods and services your Agency needs. This is done by creating a needed-item listing using the **Posted Needs** form for the item(s) you are looking for. After an Administrator reviews the listing(s), donors can review and offer to provide. You can then respond to and track these donation inquiries to coordinate with the donors to arrange for the transfer of the item(s).

Responding to Donation Inquiries

Once you have created a listing for a needed item and an Administrator has approved it, it will be posted in Volunteer Connect for public viewing. Donors will review the listing, and if interested will submit via email **inquiries** (referred to in your Agency account as **referrals**) that express their willingness to donate the item. You or another Agency contact should follow up on needed-item referrals in a timely fashion to facilitate the donation or let donors know that the need has been filled.

Volunteer Connect tracks inquiries/referrals for a needed-item listing on the **Details** page of the listing, found in the **Your Needed Items** page of the **Product Connections** tab of your Agency account.

To view and respond to needed-item inquiries:

1. Log in to your Agency account (see Logging in to Your Agency Account instructions, if needed).
2. When your Agency account is displayed, find and click the **Product Connections** tab (or whatever title the Administrator has selected).

3. On the **Product Connections** page, find and click the **Needed Items** link (if the **Your Needed Items** page is not already displayed).
4. On the **Your Needed Items** page, review the needed-item listings in the table. A needed-item listing that has received one or more inquiries will display the number received in its "**# Inquiries**" column.
5. Click the **Details** link at the right side of a listing that has received one or more referrals.
6. When the **Details** page for the listing is displayed, scroll down to the **Referrals for this item** section and review the referrals listed. To review a referral in greater detail, click the **Details** link at the right side of its entry.
7. To respond to an inquiry, click the email address of the donor. This will open up your default email application and address a new message to the donor. If clicking the link does not open your preferred email application, or does not work, you can also open your preferred email application first and then copy and paste the address provided into it.
8. Repeat Steps 5 through 7 as many times as necessary until you have responded to all new needed-item referrals.

Note that you can also find and display needed-item referrals on the **Referrals** tab of your Agency account. Volunteer Connect will also provide a shortcut for accessing Product Connections and other referrals needing follow up through a link in the **Tasks** section of the **Overview** tab of your Agency account when you log in titled **Follow up on [number] referral(s)** (where **[number]** represents the number of referrals requiring review).

Note also that when you display the **Details** page for a needed-item referral (as described in Step 6 above) you can change the referral's status by clicking the **change** link to the right of its **Status** setting. This allows you to track a donation from initial inquiry through to completion.

Contacts

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