

## Step by step process of creating Volunteer Calendar Shifts to generating fulfillments against Contact Requirements

### Step 1: Creating requirements for contacts in VolunteerMatters

Most organizations have requirements for membership even if they are as simple as just paying their annual dues. Some organizations have more complex requirements that may include volunteer hours, product sales, serving on a committee, attending meetings, attending training sessions, or passing certification exams.

To create a new requirement:

1. Log into VolunteerMatters administrative team and navigate to [Setup > Define Regs](#) and click 'New'.
2. Enter the due date (the date by which a member must completely fulfill the requirement). If certain members have the same requirement but different due dates, you must create multiple requirement records.
3. Enter the name of the requirement. Make this name as descriptive as possible as most member-facing views of requirements do not include the description.
4. Enter the requirement description
5. Enter the effective start date and end date. Each requirement must apply to a specific time period (calendar year, fiscal year, etc). This means that even if your requirements do not change from one year to the next, you must still create a new requirement in the system to reflect the change of year.
6. Enter the minimum points required to consider this requirement fulfilled. Points are a generic unit of measure that can accommodate a monetary amount, time, quantity, etc. For example, the following matrix describes varying types of requirements and what their resulting point values would be:

Name	Actual Value	Point Value
Pay membership dues	\$125.00	125.00
Volunteer 10 hours	10 Hours	10.00
Attend 4 general meetings	4 meetings	4.00
Sell 3 fundraising products	3 Product Sales	3.00
Actively participate on a committee	True/False	1.00

You can see how points can accommodate partial or complete fulfillments. For example, if a member paid for half of their membership dues, a fulfillment of 62.50 points would be applied to this total (62.50 out of 125.00 completed). If a member attended 1 general meeting, the fulfillment would have a value of 1.00 point (1.00 out of 3.00 completed). This approach can also accommodate more subjective requirements like the last example to "actively participate on a committee". An organizational leader may evaluate a person's level of participation and decide if it is deserving of a 1.00 fulfillment or not.

7. Click 'Add'

**Note: Do not simply change the dates of requirements to re-use them. All existing assignments and fulfillments still apply to the changed requirement. Also, you will lose the value of the historical information.**

## **Step 2: How do I assign requirements to a contact in VolunteerMatters?**

Once a requirement has been created in the system, you may assign it to one or more members. Assignments can be made to contacts by status or just about any other common attribute that is contained within the database.

To assign contacts to a previously created requirement follow these steps:

Log into your organization's VolunteerMatters Administrative Site Click on ['Setup', then 'Define Reqs'](#).

Click the 'Assignments' icon to the right of the requirement to which you would like to make assignments.

There are three utilities to facilitate the assignment of members:

- You may add all contacts from this requirement by clicking the 'Add All Contacts' button to the right of the assignment list
- Add contacts by status, choose a status then click 'Add'. All contacts of that status will be added to the list at the left of the page. If you wanted to add contacts of two different statuses, you would just have to use this tool twice.
- You may add selected contacts by using the chooser. Click "Choose" to the right of the "Add Selected Contacts" box. After selecting the proper contact records from the chooser you will see that the list of selected contacts now appears in the "Add Selected Contacts" box. Click 'Add' to formally request the addition of those contact records. An "Are you sure?" pop-up will appear, click 'OK' if you are sure of the change.

As you add contacts they are listed to the left of the page and the total number of contacts is displayed at the bottom of that list and in the requirement summary at the top of the page.

## **Step 3: Create Volunteer Calendar in VolunteerMatters**

After logging into VolunteerMatters, you may select Admin, then [Volunteer Calendars](#) to view a list of existing calendars or add new calendars.

Click 'New Calendar'.

Enter the following:

- **Name** – Choose a unique calendar name comprised of alpha-numeric characters
- **Status** - Active calendars are available for use. Calendars with Preview status can be displayed but will not allow sign-ups. Disabled calendars are only accessible by administrators.
- **Description**
- **Lock-in Days** - This is the number of days before a shift, after which volunteers may not withdraw using the system.
- **Lock-out Days** - This is the number of days before a shift, after which volunteers may not sign-up or withdraw using the system.

- **Time zone** - Choose the time zone applicable for this calendar. It is discouraged to create a volunteer calendar that may be used by volunteers or administrators from various time zones. If this is a necessity you must educate your volunteers that the notifications shifts times, etc. will be set to the time zone that was selected by the administrator.
- **Display order** - This value helps order calendars in lists by overriding the default alphabetical ordering. The lower the whole number entered in this field, the higher the calendar will be displayed when listed. If two or more calendars have the same display order value, they will be sorted alphabetically.
- **Allow On Behalf Of** - An administrator may identify if your contacts may "sign up on behalf of friends" for certain volunteer opportunities. When the volunteer signs-up, they will be prompted to include the name and email address of the friends they will be bringing with them. If those friends are not already in your contact database, a new record will be created and they will be added as an assignee for that event.
- **Allow Volunteer Comments** - When a volunteer signs up for a volunteer opportunity you can allow them to provide a comment/feedback at the time of the sign-up.
- **Hide Volunteers** - When a volunteer reviews the detail on a volunteer opportunity they may see a list of individuals currently assigned to that opportunity. You may turn this ability off so they may only see whether they are signed up or not. By default, calendars are set to show the list of current assignees to all volunteers.

#### **Step 4: Adding Shifts to a Volunteer Calendar in VolunteerMatters**

Adding Shifts - You may easily add new volunteer shifts for a single day, or a set of days within a range and by day of the week. To do this, log into the VolunteerMatters system, click on Admin icon and then click on the calendar you wish to add a shift to, and then click 'Add' toward the top of the page.

1. Enter the name of this volunteer shift
2. Enter a description for this shift. The description appears when a member clicks on that shift in the calendar.
3. Enter Date Range and Days of Week

Shift that is on a single day:

If the shift you are entering is for a single day, enter that same date (mm/dd/yyyy) in the 'Start Date' and 'End Date' fields. You may check the day of the week that date lands or if you do not know, you may select all days of the week (In either case it will only create that shift for the one day specified by the start and end date).

Single Shift that spans over two days:

If the shift you are entering is for a single shift on one day but extends into another, enter that start date of the first day (mm/dd/yyyy) in the 'Start Date' field and add the end date of the second day in 'End Date' field. You may check the days of the week that both dates lands or if you do not know, you may select all days of the week (In either case it will only create that shift for the one day specified by the start and end date).

Shifts that repeat over multiple days:

If you would like to enter a set of days you may enter a date range (for example 01/01/200X through 12/31/200X) by entering the earliest date of the range in the 'Start Date' field and the last

date of the range in the 'End Date' field. Next, choose which days of the week, you would like to be including within that date range. If there are dates from this set you would like to remove from the calendar you may do so by deleting shifts as described later in this document.

4. Enter the start time of the volunteer shift.
5. Enter the end time of the volunteer shift.
6. Enter the maximum number of members that may be assigned to this volunteer shift.
7. Choose the proper volunteer shift status. A "locked" shift is one that will be viewable from the website but will not accept sign-ups from members regardless of whether or not an assignment had previously been made. A "released" volunteer shift is a shift that is available to accept signups/registrations from the website.
8. Click 'Preview' to review your proposed additions
9. Click 'Apply' to save your changes or click 'Back' to alter those changes

#### **Step 5: Recording When a Contact as a "No Show" for a shift in VolunteerMatters**

An administrator may set any assignment to a "No Show" designation. This designation will record those times when a volunteer assignment has been scheduled but the contact either did not show for their assignment or canceled without sufficient notice.

To make such a designation, you will log into your VolunteerMatters Administrative system with the proper security access roles and then click on [Admin](#).

Then click on the calendar you wish to add the "No Show" to an assignment from the Volunteering section.

From there locate the shift you wish to mark as a "No Show" and click on the "Assignments" link on the right (if there are no contacts assigned it will show "Add Assignments").

On the Shift Assignments page you will click the "Edit Assignment" icon and then check "No Show" and click "Save".

(This will automatically remove the Volunteer Interaction from the Contact's record)

#### **Step 6: Generating Requirement Fulfillments from Contact Interactions in VolunteerMatters**

VolunteerMatters' Interaction Lists allow you to generate fulfillments from attendance, volunteer, or giving (if subscribed to) interaction records. You may visit the Interactions section on the [Admin page](#) of VolunteerMatters to either generate fulfillments from "Attendance" interaction records, "Volunteering" interaction records, or "Giving" interaction records. The big difference between Attendance Interactions and Volunteer & Giving interactions when generating fulfillments is that for attendance interactions you can determine the number of fulfillment points for each instance of attending. While with volunteer & giving interactions you can do the same but you may also compute the fulfillment points based on the total time volunteered or the amount of the giving interaction. Attendance Interaction records only record a date and time for attending while volunteer interactions record a date, start time, and end time so the system can compute to total time for volunteer interactions. Giving interactions record a date, subject, amount, giving type, campaign, recognition,

and notes.

1. If you click "[Attendance](#)" this presents you with a listing of all attendance interactions for your contact database. The listing displays the attendance interaction's date, subject, notes, type, contact name, and requirement flag. By default the list of interactions is filtered to show only interactions dated within the last 30 days. This is only the default "List View". You can create new or modify existing "List Views" to match your desired results, including adding or subtracting fields/columns. Your first step should be to narrow the list of interactions to only include those that should fulfill the same requirement in the same manner. You can do this by filtering on the interaction properties (Date, type, subject, notes, contact name, contact ID, and requirement flag). For example, you could filter to only include interactions of type "General Meeting" that occurred on a specific date. Clicking "Edit" to the right of a specific interaction or clicking "Mass Edit" will allow you either delete the interaction(s) or change the Requirement Flag

#### Requirement Flags:

- Inapplicable – Inapplicable interactions are those interactions that cannot be used to generate fulfillments to requirements.
- Applicable – By default, all interactions are set to be "Applicable". Only interactions marked as "Applicable" may be used to generate fulfillments.
- Applied – After using the attendance tools to generate a requirement fulfillment from an interaction, the system automatically sets the interaction to have a requirement flag of "Applied". This flags the interaction so administrators know that it had at one time been applied as a fulfillment to a contact requirement, thereby discouraging duplicate fulfillments. "Applied" scans are not available to generate fulfillments to requirements. The system does allow an administrator to manually change interaction requirement flags to or from "Applied". This accommodates unique circumstances where a single interaction may fulfill multiple requirements.

After you filter the attendance interactions, you may click the "Requirement Processing" button to define how you would like the interactions applied to contact requirements.

- Requirement – Select the requirement this attendance interaction fulfilled
- Fulfillment type – Select from one of the fulfillment types
- Fulfillment Date – Chose to set the fulfillment date to the attendance interaction date or manually designate a specific date.
- Fulfillment Points – Define the number of points to be credited to the contact for attendance to this event.
- Notes – Enter any relevant notes about this fulfillment.
- Append to Notes – Choose one or more data elements from the interaction record to append to the fulfillment notes. It is recommended to include all except for "Attendance Notes". But we encourage you to try different combinations to get the fulfillment information you want.

2. If you click "[Volunteering](#)" this presents you with a listing of all volunteer interactions for your contact database. The listing displays the volunteer interaction's date, times, subject, notes, type, member name, and requirement flag. By default the list of interactions is filtered to show only interactions dated within the last 30 days. This is only the default "List View". You can create new or modify existing "List Views" to match your desired results, including adding or subtracting fields/columns. Your first step should be to narrow the list of interactions to only

include those that should fulfill the same requirement in the same manner. You can do this by filtering on the interaction properties (Date, type, subject, notes, contact name, contact ID, and requirement flag). For example, you could filter to only include interactions of type "General Meeting" that occurred on a specific date. Clicking "Edit" to the right of a specific interaction or clicking "Mass Edit" will allow you either delete the interaction(s) or change the Requirement Flag.

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- Applicable – By default, all interactions are set to be "Applicable". The only interactions that can be converted to fulfillments are those marked as "Applicable".
- Applied – After using the interaction lists to generate a requirement fulfillment from an interaction, the system automatically sets the interaction to have a requirement flag of "Applied". This flags the interaction so administrators know that it had at one time been applied as a fulfillment to a contact requirement, discouraging duplicate fulfillments. "Applied" scans are not available to generate fulfillments to requirements. The system does allow an administrator to manually change interaction requirement flags to or from "Applied". This accommodates unique circumstances where a single interaction may fulfill multiple requirements.

After you filter the volunteer interactions, you may click the "Requirement Processing" button to define how you would like the interactions applied to member requirements.

- Requirement – select the requirement this volunteer interaction fulfilled
  - Fulfillment Type – select from one of the fulfillment types
  - Fulfillment Date – Choose to set the fulfillment date to the volunteer interaction date or manually designate a specific date.
  - Fulfillment Points – Choose to fulfill the requirement in direct proportion to the total hours volunteered (time between in/out scans or the shift start/end time – 1 hour equals 1 point) or you may define the specific number of points the volunteer interaction will be credited against this requirement.
  - Notes – enter any relevant notes about this fulfillment
  - Append to Notes – Choose one or more data elements from the interaction record to append to the fulfillment notes. It is recommended to include all except for "Volunteer Notes". But we encourage you to try different combinations to get the fulfillment information you want.
3. If you click "[Giving](#)" this presents you with a listing of all giving interactions for your contact database. The listing displays the giving interaction's date, amount, campaign, giving type, recognition, subject, notes, contact name, and requirement flag. By default the list of interactions is filtered to show only interactions dated within the last 30 days. This is only the default "List View". You can create new or modify existing "List Views" to match your desired results, including adding or subtracting fields/columns. Your first step should be to narrow the list of interactions to only include those that should fulfill the same requirement in the same manner.. You can do this by filtering on the interaction properties (Date, type, subject, notes, campaign, contact name, contact ID, and requirement flag). For example, you could filter to only include interactions of type "Annual Fund 2012 Campaign" that occurred on a specific date. Clicking "Edit" to the right of a specific interaction or clicking "Mass Edit" will allow you either delete the interaction(s) or change the Requirement Flag.

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- Applied – After using the attendance tools to generate a requirement fulfillment from an interaction, the system automatically sets the interaction to have a requirement flag of “Applied”. This flags the interaction so administrators know that it had at one time been applied as a fulfillment to a contact requirement, discouraging duplicate fulfillments. “Applied” scans are not available to generate fulfillments to requirements. The system does allow an administrator to manually change interaction requirement flags to or from “Applied”. This accommodates unique circumstances where a single interaction may fulfill multiple requirements.

After you filter the volunteer interactions, you may click the “Requirement Processing” button to define how you would like the interactions applied to member requirements.

- Requirement – select the requirement this volunteer interaction fulfilled
- Fulfillment Type – select from one of the fulfillment types
- Fulfillment Date – Chose to set the fulfillment date to the giving interaction date or manually designate a specific date.
- Fulfillment Points – Choose to fulfill the requirement in direct proportion to giving amount or you may define the specific number of points the giving interaction will be credited against this requirement.
- Notes – enter any relevant notes about this fulfillment
- Append to Notes – Choose one or more data elements from the interaction record to append to the fulfillment notes. It is recommended to include all except for "Giving Notes". But we encourage you to try different combinations to get the fulfillment information you want.