Volunteer Coordinator Guidebook

This document is a help guide for school volunteer coordinators who are responsible for communicating with volunteers, recruiting them to participate in school activities, tracking volunteers (and visitors) who enter the school and reporting on volunteer hours and activity at your campus. It should be used in combination with Volunteer Coordinator Introductory Training that should be scheduled with your District Volunteer Coordinator.

Registering & Signing In With Your Account

As part of setting up your **EZVolunteer** site we worked with your District Volunteer Coordinator to either setup the Volunteer Registration pages, and/or set up the Volunteer Coordinator (VolCo) accounts, in advance. If you are unsure whether you have an **EZVolunteer** VolCo account you should reach out to your District Volunteer Coordinator contact for clarification.

If you need to register, your **EZVolunteer** contact will provide you with a URL that you can use to create your account with a username and password. It is recommended that you use your school system email address to register. After registering you will receive an Account Confirmation message from **EZVolunteer**.

If an account was created for you, your District Volunteer Coordinator contact will provide you with the details (Username & Password) to sign-in to your account. They should also provide you with the URL to the login page of the **EZVolunteer** site.

If you try to sign-in and have difficulties, you should click the 'I cannot login' link under the sign-in block. This displays a pop-up window where you can input your Username to retrieve your account password. If you do not know your Username you can type your full name and email address to retrieve your Username.

RĒ·LĀ·TRIX@

K12 Community Engagement Solutions

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

FAQ - How do volunteers get on my school list?

While volunteers have only one record in the database they can have multiple schools to which they are assigned. If a school is listed either as the REGISTERED or as a PREFERRED school on the volunteer's record the volunteer will appear on that school list.

A school can get added to a volunteer's list one of three ways –

1. The volunteer can add the school. This can be done when they register online or anytime after registering by signing into their account and choosing Volunteer › Preferences.
2. The Volunteer Admin or Coordinator can add the school by editing the volunteer's record. This is done by changing the REGISTERED or PREFERRED school and saving the changes.
3. The Volunteer Coordinator can add their own school by using the ADD VOLUNTEER button; typing the first and last name of the volunteer; clicking the CHECK DATABASE button and selecting the volunteer's name from the list of possible candidates in the database. If the volunteer does not appear on the list they should be asked to register online.

RE·LA·TRIX@

K12 Community Engagement Solutions

Registering School Volunteers

All new volunteers register on your school district's **EZVolunteer** website. This site has been configured with your district's logo and settings.

Step 1 for volunteers it to create an account, with a username and password they can use to sign back in later to manage their account. Their Username can be their email address, but is not required to be. Their password must be at least 8 characters long.

Account Credentials	
Username:	
Password:	
Confirm Password:	

Type the characters you see displayed below. No spaces are required between words.

5443   I can't read this

Step 2 involves typing in their contact details, including name, address, phone and email. Volunteers do not have to provide an email address, but without one they will not receive system notices or email blasts you send to recruit or notify volunteers.

Volunteer Registration: Contact Details

Provide full name, address and email so we can contact you about volunteer events at our schools.

Name & Physical Address

First Name *:	
Middle Name:	
Last Name *:	
Home Address *:	
City *:	Fort Collins
State:	CO ▼
Zip Code *:	

Email Address(es)

Primary Email Address :	
Secondary Email Address:	

Phone Number(s)

Primary/Home Phone *:	
Work Phone :	
Mobile Phone:	

RE·LA·TRIX@

K12 Community Engagement Solutions

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

Step 3 requires the volunteer to choose their affiliations, other than as a volunteer, that defines their relationship to the school district. Examples might include Parent, Staff or Student. If selecting Student or Community Partner the volunteer can specify which partner by typing the name in the available text field. If they choose Student they can choose the school (your district high schools or local colleges and universities) the attend.

Step 4 is where the volunteer can choose the school or schools where they want to volunteer. When signing up the first time a volunteer will have to choose their 'registered', which is where they will spend most of their time. By default, this is usually the district office, but the volunteer can select any other school in the district.

If they have more than one student attending school or want to volunteer at multiple schools they can choose additional schools as 'preferred' schools. The volunteer's record will appear on the list at their registered school and preferred schools, and any edits made to their record, like updating their email address, will be visible by all school coordinators working with the volunteer.

In addition to schools volunteers choose the type of activities they want to work, and they can provide additional details about specific skills or school activities in which they are interested.

RE·LĀ·TRIX@́
K12 Community Engagement Solutions

Volunteer Registration: Preferences

Volunteer Schools

Registered School:

Select the school where you are registering to volunteer, or where you will be spending most of your time, and your affiliation with that school. You can select other schools later

[*Volunteer Center ▼]

Preferred Schools:

Please select any other schools where you would also like to volunteer

Available Schools
*Career Center
*No Preference
*Partnership Center
AAA Test INACTIVE
Academy
ARCS

[Add >>]
[<< Remove]

Selected Schools
*Volunteer Center

Preferred Opportunity Types

Some activities require us to run a background check, and if you choose one of these we will ask you for additional details so we can complete this standard safety precaution.

Available Opportunity Types
Art Program Support
Awards Ceremonies
Classroom Volunteer
Enrichment Activities
Fairs (Science, Book)
Field Day

[Add >>]
[<< Remove]

Selected Opportunity Types

Skills and School Activities

Please let us know about any special language, technical, business or other skills that could help match you to volunteer needs in our schools. You can also use this section for specific activities(e.g. - Winter carnival, book fair, etc.) at your selected schools(s).

Step 5 is the final step and requires the volunteer to provide the information need to run a background check. They also must agree to the district policies that pertain to volunteers and provide any additional disclosures your district volunteer administrator provided.

Volunteer Registration : Background Details and Disclosures

The following information will be used to perform a criminal background check before you can be approved to volunteer in our schools. If you are not willing to allow us to run a background check click CANCEL to terminate this registration process.

Background Details

Date of Birth * : (MM / DD/ YYYY)
[ ] / [ ] / [ ]

Gender * :
○ Male ○ Female

Previous Names : Include any aliases, maiden or previously married name. Give First and Last name. Type one full name per line.

Disclosures

You agree with terms and Conditions

☐ I Agree

When finished registering a volunteer will receive a confirmation email about their account (assuming they included an email address). If your district uses our **RealTimeScreening** service we will run a database search through a national criminal history database with our partner BackgroundChecks.com. From the results of that search they will either be approved or require additional review of those results by your district administrator or H/R. If your district uses an alternate batch screening, it may take 3-7 days for the review process to be completed.

Volunteers who are being reviewed WILL NOT appear on your school volunteer list until the review is complete and they have been approved. If a new volunteer comes to your school and you do not see them on your list, ask if they got a confirmation email after registering and whether it said they were approved or being reviewed.

Volunteer Registration: Thank You!

Thank you for registering as a volunteer with our school district. As a final step we need you to print and sign the volunteer registration form and return the signed form to the administrative offices of the school where you registered. At that time you will also need to show a photo ID to the school staff accepting your form. To view and print your form you need Adobe Acrobat Reader for your browser. If you do not have Acrobat Reader, click here to download. If you are unable to download your form now you can sign-in to your account from the district website and print the form there.

Working With Your Volunteer List

Your volunteer list is accessed from the admin console of your **EZVolunteer** site. It contains the list of approved volunteers at your school. Some volunteers may appear on other school lists, in addition to yours if the volunteer selected multiple schools during registration.

There are numerous task you can perform from your Volunteer List including:

1. **Add A Volunteer** - Use the Add Volunteer button to add a new volunteer to your list. This option is generally used if you have other staff who need to be included as volunteers so you can assign them administrative roles.
2. **Search/Edit A Volunteer Record** - Type the last name of the volunteer in the LNAME column and the system will filter your list. Click the LAST NAME of a volunteer to open their record and edit it, as necessary.
3. **Filter Your List** - You can filter your list by a volunteer's affiliation, interests, background status, whether they have hours recorded, and whether their ID has been verified. You can also use more advanced filtering if you set-up newsgroups for school specific events and have assigned (or volunteers have subscribed) to any of your school's newsgroups.

RĒ·LĀ·TRIX@

K12 Community Engagement Solutions

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

4. **Email your volunteers** - There are three options from the Action drop down that will send emails to your selected volunteers. First, if you or your administrator have created a Notice in the notices module you can publish that to your volunteers. Second, you can notify your volunteers about an opportunity you created. Third, you can just type an email and send it to your selected volunteers.

5. **Print Badges** - If your district uses our EZVKiosk module for signing volunteers into and out of your school you can create a PDF of badges for your volunteers and print them on name badge stock or plain paper. Our name badges are formatted for Avery 5390 name badge stock.

6. **Run Reports** - While there is a separate reports module you can also run quick reports on selected volunteers to get their recorded hours, their email and phone or their EZVKiosk activities.

7. **Remove Volunteers** - There are two ways to remove volunteers from your list. First, if you know the volunteer has left the school district, or there is a duplicate record on your list you can Delete the volunteer. This will also remove them from ALL other school lists - so be careful using this option. Otherwise, you can choose the Remove From List option to remove your school from their record, but allow them to remain on other school lists.

8. **Verify Their ID** - If your district chooses to take the added precaution of verifying volunteers who have registered online, you can ask to see their ID and then log that you verified the name and photo of the person on the ID with the person in your school.

9. **Log Hours** - You can click the Log Hours link on a volunteer's record to log any hours they might have missed, or just view the details of the hours they have recorded year-to-date.

Volunteer List

| Add Volunteer | | | | | | | | | 🔍 |

Filter/Search ALL Schools   *Administration Building ▼   --Choose a Groups Filter-- ▼   Choose a Filter... ▼

Choose an Action... ▼ Go   Hide inactive volunteers

Select All   Displayed: 6   Selected: 0   Export To Excel

☐	LName	FName	Primary_Email	Phone	Register	Update	BG_Chk	ID_Verify	Hours	Role
☐	Business	Local	localbusiness@relatrix.com		10/14/2015		11/30/2015	07/12/2016	Log Hours	Volunteer
☐	Contact	Partner	vipin.agarwal@arcscorp.com	720-989-8195	07/01/2015	03/21/2016	03/21/2016	07/12/2016	Log Hours	Volunteer
☐	Franke	Mark	mfranke@relatrix.com	970-668-9438	06/30/2015		07/05/2016	07/12/2016	Log Hours	Volunteer
☐	Partner	Demo	partner@relatrix.com		10/14/2015	03/09/2015	11/30/2015		Log Hours	Volunteer
☐	Support	Demo	mfranke@relatrix.com	720-989-8195	02/13/2015	06/06/2016	11/30/2015	01/01/2015	Log Hours	Volunteer
☐	Volunteer	Demo	training@relatrix.com	970-668-9438	02/18/2015	06/23/2015	11/30/2015		Log Hours	VolCo

Page 1 of 1 (6 items) ◁ [1] ▷   Page size: 100 ▾

Sending Emails To Your Volunteers

If you choose to Send A Notice to your volunteers, you must have an existing notice in your Notices Module. If you choose to Notify Opportunity, you must have an existing opportunity in your Opportunities Module.

If you want to Email Selected volunteers, you can type a simple message or cut-and-paste* from another Word or another desktop application (*use the Paste tools to ensure you don't bring over any unwanted formatting when you paste. The paste tools are the small clipboard icons). You also have the option of using a Template for standard layouts or messages and inserting links and image files in your message before and sending the email to your volunteers.

Always include the name of your school in the Subject line to help easily identify from where the email is coming. It is also recommended that you include contact details within the message. This helps the recipient get back in contact with the correct person.

(**Note**: Creating a Notice is very similar using the Email Section option. The major difference is that notices are tracked and you can see how many were opened, bounced or accounts were inactivated. None of this tracking detail is available with the Email Selected option.)

Logging And Editing Hours In EZVolunteer

There are multiple methods for logging volunteer hours that can be done by you or by the volunteer themselves.

First, volunteers can sign-in to their account, click on the **Volunteer > Hours** tab and choose the opportunity the worked on (assuming they signed up) or simply choose a school where they worked and log their hours for that school.

Additionally, when a volunteer uses our EZVKiosk they can choose the activity (aka opportunity) they are signing in for and the kiosk will track their hours from arrival to departure.

Second, as a volunteer coordinator you can record hours on a volunteer's record by clicking the Log Hours link from your Volunteer List. This will display the same **Volunteer > Hours** page your volunteer uses and you can record hours on their behalf.

You can also record hours for any/all volunteers who are signed up for an opportunity. Simply, go to your Opportunities List page and click the **#Volunteers** or **#Hours** count for that opportunity.

If you click #Volunteers you will see the list of volunteers signed-up and can record hours for them individually by clicking their name and typing the hours they worked into the form that pops-up.

If you click on #Hours you will see a timesheet view of the opportunity, with the ability to select the date and type hours for all volunteers who worked on your opportunity on that date. This is a great way to add hours from a manual sign up sheet.

Using Opportunities At Your School

If you want to notify volunteers about activities, and get them to sign-up; if you want to track how many and which volunteers are working on a specific activity; or if you want to know how many hours were worked at an event or on a program (e.g. Classroom Mentors) you will want to use opportunities.

You can create any number of opportunities for your school. Opportunities can be used for a single event, such as a book fair, or for a program that runs all year long, like lunchroom volunteers.

Adding Opportunities

To set-up an opportunity go to your Opportunities Module and click the Add Opportunity button at the top of the page. This will display a page with several sections that you will need to complete to set-up your opportunity.

RĒ·LĀ·TRIX@

K12 Community Engagement Solutions

In the top section you can specify the following **General Settings** -

Available All - This will make this opportunity appear on the Available Opportunities page for any volunteer who signs into their account and goes to Volunteer › Opportunities. From there they can sign-up for the opportunity.

Match All - This will sign-up all your active volunteers to this opportunity. This option can be useful when you want all volunteers to see this opportunity and record hours to it without actually having to sign-up first. An example might be 'campus beautification' where you want to track volunteer hours on this activity without going to the added step of notifying and signing volunteers up.

Display Kiosk - This option will cause the opportunity to appear on the EZVKiosk after a volunteer signs-in to the kiosk. The opportunity will appear for all volunteers at the kiosk, and if selected they will automatically be signed up and their hours recorded to that opportunity for the day.

Volunteers Needed/Matched/Logged - These display the number of volunteers you are seeking for this opportunity. By default this is set to 999, which means all volunteers can sign-up. If you type a different number, **EZVolunteer** will limit the sign-up to no more than the number you need. The Matched and Logged fields are links to view the number of matched volunteers on this opportunity and the number of hours logged.

In addition to these basic settings you should type the NAME of the opportunity, the type or category of the opportunity, along with the location of the activity and a description. If you will be using the communication functions of 'Notifying' about the Opportunity, be sure to give full details in the description, as the templates will draw from these fields. Location is often the campus front-office, but in cases where you want volunteers to assemble at a different place make certain to include an address or description (band hall, football concession stand, etc.)

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

RĒ·LĀ·TRIX@
K12 Community Engagement Solutions

The next section is the **Schedule** for the opportunity. If you are creating a one-time event the simply choose the Start & End date and time and move the next section.

If you want to create a recurring activity, check the 'This is a recurring opportunity' box and fill-out the schedule for the activity. For recurring opportunities the initial Start/End Time is the 'first occurrence' of the sequence. You can choose a recurrence pattern, such as 'daily', 'weekly', etc., and the range of recurrence or end date.

Finally, you can choose to add the opportunity to your **EZVolunteer** calendar. This option will display a list of event categories and you can select which to add this opportunity. Once you select an event category and save this opportunity it will display on your calendar and volunteers can view the details and sign-up for the opportunity from there.

After the schedule you can **Assign Coordinators** to your opportunity. For someone to be an opportunity coordinator they must first be a registered volunteer and on your school's Volunteer List. Click the 'Assign Coordinators' button to see your list and select the person or people who will serve as coordinators for this event.

The coordinator's name(s) and contact details will appear with the opportunity when you notify volunteers, or when they sign-up from their account. Once selected you can also specify whether the coordinator(s) will be notified whenever a new volunteer signs up for this opportunity. It's a great way to keep them informed about who to expect to show up.

RĒ·LĀ·TRIX@
K12 Community Engagement Solutions

The **AUTO Settings** section can largely be left as is, until you close out your opportunity or unless you have much more advanced requirements when it comes to matching volunteers to this opportunity. If you want to 'pre-approve' a volunteer before letting them sign-up simply uncheck the Auto-Match option and volunteers who sign-up will be set to pending, until you accept and match them manually to the opportunity.

The final section is the **Thank You Page Settings**. Here you can customize the wording that appears on a thank you page when a volunteer signs up to this opportunity. It can be useful to include any other instructions that only pertain to volunteers who are participating in the event.

In addition to giving them further instructions you can add a link to a shift sign-up page on your website, or you can create and use a Shift Form from our Forms Module. This form is linked to the thank you page and volunteers are redirected to the form to choose an individual shift for which they can work. Shift forms can include options that are limited to a fixed number of responses, so if you only want 5 people per shift for three shifts you can limit to the first 5 who complete the form.

Once you finish filling out the details of your opportunity you can use the SAVE button to save your settings and continue editing. The FINISH button will SAVE and return to your list

RE·LA·TRIX@
K12 Community Engagement Solutions

of opportunities. The NEW button saves this opportunity and brings up a blank form, with the assumption you want to create another opportunity.

After saving an opportunity you can go back in and editing the settings or you can use COPY OPP to make a copy of the opportunity if you have another with very similar settings.

Tracking Opportunity Sign-ups

After you create an opportunity you can send a notification to your volunteers to recruit the number you need to sign-up. Aside from assigned opportunity coordinators being alerted when new volunteers sign-up you can also track you volunteer sign-ups from your Opportunities List page. This page keeps a running total of the number of volunteers who have signed up for any of your opportunities and the number of hours recorded, so far.

Opportunity List

Add Opportunity

View Closed ☐   *Administration Building ▼

Delete Selected ▼   Go

Select All   Selected : 0

☐	ID	Name	School	Type	Start On	#Hours	#Volunteers	Status	Get URL
☐	1	Classroom Assistant	*Administration Building	Classroom	9/1/2014 4:00:00 AM	7	3	Logging	URL
☐	2	Vision & Hearing	*Administration Building	Clerical/Offi	10/1/2014 11:30:00 PM	0	0	Logging	URL
☐	7	School/Site Opportunity	*Administration Building	Classroom	8/1/2015 7:00:00 AM	0	0	Logging	URL

Page 1 of 1 (3 items) [<] [1] [>]   Page size: 100 ▾

To see who the volunteers are that have signed up simply click the number in the #Volunteers column for your opportunity. This displays the **Matched Volunteers** page for your opportunity. From this page you can do everything you need related to this opportunity. This includes:
Notify (Email) Volunteers - If you don't have as many volunteers as you need for this opportunity, rather than going back to your volunteer list, simply filter your list status from 'Matched' to 'Available', which shows all volunteers who haven't signed up. You can select and notify them to recruit the remaining volunteers you need. You can also **Send Notice** or **Email Selected** volunteers. The latter can be useful for any last minute reminders about the opportunity.

Reset To Available - If one of your volunteers has to cancel you can simply select their record and reset them to available.

Print Roster - If your opportunity occurs off-campus or after-hours you can select all your volunteers can print a PDF roster for your opportunity coordinator(s) and email them the day of the activity. They can use this to sign-in/out volunteers.

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

K12 Community Engagement Solutions

Log Hours – By clicking on the volunteer's last name you can record their hours working on this opportunity. Alternatively you can click the TimeSheet button to view the timesheet for the opportunity and record hours for all volunteers.

Tracking Hours For your Opportunity

The **TimeSheet View** of your opportunity is a quick way to browse through who volunteered, on which day they volunteered and how many hours they recorded. This view will display both the hours logged by you or the volunteer. In addition it will show any hours from the EZVKiosk, assuming the volunteer selected the opportunity when they signed in.

From the TimeSheet View you can browse through the schedule of your opportunity (if it's recurring) to find a specific date and see who worked and for how many hours on that day. You can also search for an individual volunteer by name and see all the days they worked and hours they logged. If you need, you can edit or delete those hours.
You can also CLOSE OPP if you are finished with this opportunity and want to 'close the book' on signing up or recording hours to the opportunity.

If you are making changes on one day you can UPDATE your changes and then browse to another day or volunteer's hours. When finished you can SAVE your changes and return to the Opportunities List page or Match Volunteers page.

RE·LA·TRIX@

K12 Community Engagement Solutions

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

Log Volunteer Hours

| Name: | Classroom Assistant | | Type: | Classroom | School: | *Administration Building | | ID: | 1 |

| Volunteers Matched: | **3** | Hours Logged: | 7 | | | Opportunity Date: | 9/1/2014 4:00:00 A ▾ |

<PREV NEXT>

| Update | Save | Cancel | | | | Search | | Close Op |

Volunteers	**Comments**		**Hours**	
Partner, Demo			0.0	Delete
Support, Demo			0.0	Delete
Volunteer, Demo			0.0	Delete

| Update | Save | Cancel | | | Close Op |

Only select this if all your hours are logged.

Opportunities & Your Kiosk

Once you create an opportunity you can use it many different ways for recruiting, tracking and logging hours. One of the most useful methods is when you choose the option to 'Display In Kiosk' in your General Settings.

This will cause the opportunity to appear as an option on a drop down menu when a volunteer signs in to your EZVKiosk, either with their name badge or manually. On the Start Volunteering page, aside from selecting an opportunity the volunteer can -

Specify An Expected Departure - If the volunteer is planning to be working beyond when the front office closes or will be finishing their work off-campus they can change choose an expected departure time. By default **EZVolunteer** assumes 1 hour of volunteer time should be logged. If the volunteer leaves through the front office and signs out then **EZVolunteer** will record their actual departure time. Otherwise, it will only record the hours up to the Expected Departure.

Include a Purpose Of Visit - If the volunteer is working on a special project or activity they can include any comments, such as 'Teacher Appreciation - Ms Jones'. This information will be recorded and can be reported on as part of the Kiosk Reports.

If the volunteer is not actually on-campus to volunteer but just visiting, they can press the **Just Visiting** button and even though they signed in as a volunteer their hours will not be logged as a volunteer.

If they need to log hours from a prior date or update their account details they can click the **Main Menu** button and choose to perform those other tasks while at the kiosk. While the extra tasks are available from within the kiosk, as a best practice we recommend encouraging

RE·LA·TRIX@

K12 Community Engagement Solutions

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

volunteers to do these additional administrative tasks at home or on their phone, so they do not slow down others who may need access to the kiosk.

Arrival:	07/24/2016 03:20 PM
Expected Departure:	04:20 PM ▾

(You can modify your expected departure time later, if it changes.)

Activity : Demo Elem - Classroom Volunteers ▾

(Choose any school activity or default to the school's generic event.)

Purpose of Visit:

(examples – 'Mrs. Jones Classroom help' or 'Lunch with student')

Main Menu	Just Visiting	Start

Opportunities & Your Calendar

When you create an opportunity you can choose to add it to your calendar. This option lets you choose which event category to assign your opportunity. Your district administrator and Relatrix account team will most likely have set-up event categories for you. If you are using our **EZVolunteer/Basic** system, then your events will be assigned to a category named for your school (e.g. Adams Elementary). If you are using our **EZVolunteer/Enterprise** system you can create any number of your own categories to organize your volunteer activities.

Any opportunity that is added to your calendar will display on the **EZVolunteer Event Calendar** page. This page is part of your **EZVolunteer** website and gives your volunteers the options to –

1. *Filter by Event Category* – By unchecking schools/categories they don't want to see a volunteer can narrow the volunteer events to just your school.
2. *Browse The Calendar* – Volunteers can search ahead several months or view by day or week.
3. *View Opportunity Details* – For any opportunity on the calendar a volunteer can click on and view the details of that opportunity.
4. *Subscribe To Event Feed* – Similar to RSS feeds for news, volunteers using online calendars like Google Calendar can subscribe to an iCal feed and by doing so see all events of a particular type on their personal calendar without having to return to your **EZVolunteer** site.

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

RĒ·LĀ·TRIX@́
K12 Community Engagement Solutions

Opportunity Details On Your Calendar

By clicking on an opportunity displayed on your event calendar volunteers can see the start and end times, along with the location, description and opportunity coordinator(s) (if assigned).

If the volunteer wants to sign-up for this opportunity they can use the *'Click Here'* link to sign-up for the opportunity. This will require them to sign-in to their **EZVolunteer** account, if not already signed in, before allowing them to sign-up for the activity. If they are already signed up then **EZVolunteer** will display the Hours Log page for them to record their hours.

Additionally, if the volunteer wishes they can add the event/opportunity to their personal calendar, assuming they use an application like Google Calendar or Outlook. This allows them to manage their volunteer commitments along with the other scheduled events.

K12 Community Engagement Solutions

Opportunities & Shift Sign-up Forms

Volunteer shifts can be scheduled as part of managing your opportunities using our **Forms Module**. Forms can be linked to your opportunity on the Thank You page or can be added as a link on your website or in any Notices or Emails sent to your volunteers.

To create a new form, select the Forms Module from the left menu and click **Add Form.** This will display your Form Settings page for your new form. There are several settings that are necessary for your form to work correctly, including –

Form Title – This will appear at the top of the form when displayed for volunteers to select their shift. It will also appear on the Forms List page. You should include your school name as part of the title, so it is clear and distinct from any other forms in the Forms Module.

Active Date Range – These are the Start and End dates of when you will allow volunteers to sign-up for shifts.

Allow Anonymous Responses – This will allow volunteers to view, complete and submit their form response without being signed in to their account. If you want to require they be signed in beforehand, do not check this box.

The advantage of not allowing Anonymous Responses is you don't have to ask for the volunteer's name and email in the form, since that is captured as part of the account authentication. The other advantage is non-Anonymous, or Authenticated responses do not allow duplicate responses. If a volunteer changes their mind their response is updated, rather than duplicated.

Form Instructions – These instructions will appear on the form page below the title and should give clear guidance to volunteers about selecting shifts.

Thank You Message – This appears on a separate page after the volunteer submits his/her form.

Email For Responses – Type the email of the opportunity coordinator for the associated opportunity and they will receive an email for each volunteer who signs up for a shift.

Form Title	Adams ES - Shift Form For Hearing Tests

Active from : 7/24/2016   Until : 7/31/2016

Shared ☐   Include Form on main page ☐   Allow anonymous response ☑

Email Intro(Text that will appear in the email sent to users when Form is published)

Form Instruction (Text that will appear at the top of a Form when the user takes the Form)

Please choose the shift you want to work for the hearing tests opportunity at Adams Elementary on August 22nd.

Thank You message

Thanks for signing up to help with Hearing Tests at Adams ES.

Questions * This will save the Form

Enter Email Address to receive individual responses as they are entered.

demo@relatrix.com

When you have finished with your forms setting click the **QUESTIONS** link to save your settings and proceed with adding your form questions.

If you are using the Allow Anonymous option you will need to include as your first questions the volunteer's name and email or phone for follow-up. If you are not using the Allow Anonymous option then you can create a survey with just the questions related to the shift sign-up, as **EZVolunteer** will track the name, email and phone of each person responding on the form.

The question(s) related to shift sign-up can either be a '**Radio Button With Limits**' question or a '**Checkbox With Limits**' question. You can specify the number of sign-ups for each shift, and the text displayed when you reach your maximum number of sign-ups.

Add New Multiple Choice Option(s)

To add new multiple choice options(s), enter the Multiple Choice Text and select the Next button. Please select the Cancel button when you are finished creating Multiple Choice Options.

Form Title: Adams ES - Shift Form For Hearing Tests

Question Desc: Choose The Shift When You Can Work:

Multiple Choice Option   9:00 AM - 11:00 AM

Limit   5

Save – Cancel – Return   Next >>

Once you have created your form questions you should SAVE and test it by using the URL link on the **Forms List** page to verify the layout and content of your form.

RE·LA·TRIX@

K12 Community Engagement Solutions

Now that you have a shift sign-up form created you can add it to your opportunity by returning to the Opportunities Module, editing the opportunity where you want to include your form and in the Thank You Page section, click the 'Select A Survey/Form'.. Choose the form you created and SAVE your opportunity.

Creating Newsgroups For School Specific Activities

While the Opportunities Types in EZVolunteer are one way to target volunteers based on their interests, they represent district-wide standards. Sometimes you'd like to be able to find which volunteers are willing or at least interested in specific activities at your school - like a Halloween Carnival, School Ground Clean-up, etc. That is where Newsgroups can be an valuable tool.

With newsgroups you can create those interest areas that only apply at your school and either assign volunteers to those groups, if you know they really are interested, or let your volunteers subscribe to Newsgroups on their own.

Here's how you can use newsgroups. First, you will need to set-up a group and subscriber options for your school. Second, you need to let your volunteers know they can sign-up. Third, you can send out targeted requests to subscribers in your newsgroup when you have an opportunity for which they can sign-up.

Setting Up Newsgroups

To set-up a newsgroup, go to **Settings** › **EZCommunicator** and click the **More** button at the bottom. This will display a long list of settings options, from which you should choose _Newsgroups_. You will see a page which may have other school newsgroups already.

Start by using the **Add Group** button to set-up your School Volunteer Activities. Call the group your school name (eg - Demo ES) and SAVE your group. Next, click the **Add Option** button and type an option name (like Halloween Carnival) and make it Public and make sure it's assigned to your school, so your volunteers can see it when they sign-in. Repeat with adding more options until you have listed all you need.

	Group/ Option	Parent Group	Shared	Private	Subscribers
☐	Adams ES				0
☐	Christmas Carnival	Adams ES			0
☐	School Ground Cleanup	Adams ES			0
☐	Demo ES				0
☐	Halloween Carnival	Demo ES			0
☐	Teacher Appreciation	Demo ES			0
☐	Demo Newsgroups				0
☐	Board Meetings	Demo Newsgroups			1
☐	District Newsletter	Demo Newsgroups			1
☐	School Closings	Demo Newsgroups			0

News Groups

Add Group   Add Option

Choose an action ▼ Go

Select All   Displayed: 10   Selected : 0

Page 1 of 1 (10 items) ‹ [1] ›   Page size: 100 ⌄

Getting Volunteers Subscribed To Newsgroups

Once you setup your newsgroups you can either assign volunteers to those groups, if you know who they are, or you can let volunteers sign-up for a newsgroup from within their EZVolunteer account.

To assign a volunteer to a newsgroup follow these steps -
1. Go to your Volunteer List page
2. Check the box for any volunteer you want to assign to a newsgroup
3. Use the Action dropdown menu and choose **ADD TO GROUP**, and press **GO**
4. This will display a list of available Newsgroups from which you need to select your newsgroup
5. Press **ASSIGN**

To let volunteers know how to subscribe follow these steps -
1. Create a notice in the **Notices Module** (See Working With Notices)
2. Include in the content of your notice instructions to volunteers to
   a. Sign-in to their volunteer account with username & password
   b. Under the **USER PROFILE** tab choose **SUBSCRIPTION**
   c. Click the School District's Name to view subscriptions

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

K12 Community Engagement Solutions

> d.   Choose the Newsgroups for your school they want to subscribe
> e.   **SAVE** their updates
3.   From your volunteer list page, use the **SELECT ALL** link to choose all volunteers
4.   From the Action dropdown choose **SEND NOTICE** and choose **GO**, then select the notice you created in the Notices Module and press **SEND.**

Using Newsgroups To Target Volunteer Emails

Once you have subscribed volunteers to your Newsgroups it is a simple matter to use your newsgroups to send notices, email blasts or opportunity notifications to them. Follow these steps –

1.   From your Volunteer List page use the *Choose A Groups Filter* drop down to find and select your Newsgroup. This will filter your volunteers to just subscribers to your selected newsgroup.
2.   Use the *Select All* link to select all your volunteer, newsgroup subscribers
3.   From the Action dropdown choose either Email selected, Send Notice or Notify Opportunity, depending on which action you want to perform and complete these steps to send your selected volunteers a message.

Sending Notifications About Opportunities

Opportunity notifications are a way to use **EZVolunteer** to recruit volunteers to participate and work on specific events or programs in your school. Notifications are based on templates that are set-up for district-wide use. These templates pull all the relevant data about your opportunity into an email that is sent to the volunteers you choose. You do not have to type any email messages. You only need to complete the setup of your opportunity.

There are two places in **EZVolunteer** where you can send an opportunity notification.

The first is from your **Volunteer List**. After setting up an opportunity you can filter your volunteer list, select your volunteers and from the Action menu choose **Notify Opportunity.** You will then be able to select the opportunity you want to notify volunteers about with an email blast.

The second is from your Opportunities Module on the **Matched Volunteers** page, which you reach by clicking the number of volunteers who currently signed up for your opportunity. From this page, if you want to recruit more volunteers than are currently signed up you can –

1. Filter your list to Available volunteers.

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

RE·LA·TRIX@
K12 Community Engagement Solutions

2. Select volunteers and use the Notify Opportunity option to send them an email reminder that you're still in need of more volunteers

Each notification email includes a link so your volunteers can sign-up for your opportunity.

If you would rather write a personal message to your volunteers than send them a template-based email you also have the option to get the sign-up URL from the **Opportunity List** page. You can copy this link into any email or webpage to include more description and context about the event.

Working With Notices In EZVolunteer

Notices are composed and managed in the **Notices Module** of your **EZVolunteer** site. If you are using our **EZVolunteer/Basic** system then you share these notices with other schools in your district, so it is important that you establish a naming standard for your notices to avoid confusion. If you use our **EZVolunteer/Enterprise** each school will have their own **EZVolunteer** website and has their own list of notices in their **Notices Module**.

Creating a notice is very similar to creating an email blast. There are a couple important differences, however.

First, because you are going to save the notice for tracking and reuse, you have to include some setup parameters not used when composing an email blast. Second, notices give you access to other channels, such as SMS and social media for getting your message out to volunteers.

To create a notice for communicating with your volunteers open the **Notices Module** from the left-side navigation menu and choose **Add Notice**. This displays a new notice add/edit page. You will need to set-up your notice by providing the following information.

Name - Type the name of the notice. If you are using **EZVolunteer/Basic** then you should include your school name in the name of the notice so other volunteers coordinators are not confused. The name will appear on the Notices List page after saving your work.

Description - This field is used both for preview text in the inbox of your email recipients, and as the summary that appears on the notice archive page.

Monitor Email - This can be one, or multiple email address (separated by commas) of people who you can send a test version of your notice before blasting it to your volunteers. This address will also receive a confirmation email when all messages have been sent.

RE·LA·TRIX@

K12 Community Engagement Solutions

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

Text - If your school district is using our optional SMS Text Messaging service you can send a test message to yourself before sending text messages to your volunteers.

Shared/Archive/Auto-Translate - These options allow you to SHARE this notice with other schools (only applies in Enterprise version), ARCHIVE this notice so website visitors can view at a later date, AUTO-TRANSLATE by adding language options at the top of our notice for ESL readers to click and view your message in their native language.

The section label HTML Email is where you type or cut-and-paste (paste using the Paste Tools) content to compose your message, in the same way you would in the email blast function. Below HTML Email there are other sections for composing an SMS Text message to send out with this notice and a Social Media section to compose Facebook and Twitter posts, which are posted when you send out your notice.

These sections, or channels, are not required, and you can SAVE your notice, after sending yourself a test message. Once you have set-up and composed your notice you can use it from your **Volunteer List** page or your **Match Volunteers** page. In both locations simply select the volunteers to whom you want to send the notice and use the Action menu to choose **Send Notice**.

After you send your notice to selected volunteers you can return to your Notices List and see the results of your message by clicking on the number in your Email column (the number of emails sent). From the results page you can tell how many messages were sent, bounced, opened and if anyone inactivated their account to stop receiving messages from the system.

RE·LA·TRIX@
K12 Community Engagement Solutions

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

Running Reports

There are two places in **EZVolunteer** where you can run reports.

The first is from your **Volunteer List** page, where you can select individual volunteers and using the Action menu, select the 'Report – Email/Phone (XLS)' option. This will generate an Excel spreadsheet as output with the Email, Phone and other contact data on the selected volunteers' record.

The second is by using the **REPORTS Function**, which is accessed from the page header of your admin console. Start by hovering on the Reports icon and under **EZVolunteer** choose the type of report you want to run

Volunteer Reports

There are a variety of Volunteer reports you can run. These are referred to as Report Layouts. In addition you can filter your volunteer list to report on just those volunteers you want.

Layouts for Volunteer Reports include –
Mailing – This will generate a report with the name and mailing address details of your volunteers. This is the best layout to choose if you will be doing a mail merge letter and want to include an inside address.

Phone/Email – This generates a report with the phone and email contact details, along with the volunteers background status *This is the most inclusive report layout, so you will get the most data about the volunteer here.

Avery 5160 and 5164 – These two layout format your volunteer report for printing on this Avery label stock. If you choose one of these layouts you should choose Export to PDF for your Output Option.

Missing Information – This generates a report with information that is missing on the volunteer's record. This layout is most useful if you imported volunteers into **EZVolunteer** and may need to 'fill in the blanks'.

Name Tags – This allows you to create a report of Name Badges for your volunteers. This layout is useful if you need to apply specific filtering to your volunteers that cannot be done from your Volunteer List page.

Exchange File – Choose this layout if you need to import your volunteers into another system for sending newsletters or tracking.

Volunteer Count – This will show the summary of volunteers by affiliation at your school(s).

After choosing a layout for your volunteer report you can filter using the following parameters –

Volunteer Status – Choose between _New Registered, No Hours_ and _Active, Hours In DB_ or _Both_. This will limit your report to volunteers with or without hours. The default is _Both_.

Active/Deleted/Both – Use this option if you need to see a report of volunteers who were flagged for deletion. (**Note**: We purge DELETED Volunteer records once a year during the summer.)

Schools – As a district administrator you can choose one or multiple schools. As a school volunteer coordinator you can report only on volunteers at your school.

Date Registered – Use this to filter your report to only volunteers who registered between specific dates. Leaving these blank will filter for all registration dates.

Background Status (IMPORTANT) – Filter your volunteers by their background status. By default we use ALL statuses. You probably will want to filter to OK – Basic, which means the volunteer has gone through initial background screen and come back approved.

Affiliation – Choose any Affiliation or set of affiliations on a volunteer's record. By default we don't filter by this parameter, so all affiliations are included.

Opportunity Type –Choose any Opportunity type the volunteer may have signed up for. By default we don't filter by the parameter, so all opportunity types are included.

Search – Use this Button to search manually, by name for volunteers you want in your report.

Organization Name – If a volunteer chose 'Community or Business Partner' as an affiliation you can filter your report by the partner's organization name. You will need to type it exactly as it was entered by the volunteer, unless you are using our EZPartner system, in which case this will appear as a drop down menu with all registered partners.

K12 Community Engagement Solutions

Student Affiliation – If your volunteer chose 'Student' as an affiliation you can filter your report further by the school they attend.

Group Subscribers – If you are using the Newsgroup feature of **EZVolunteer** to allow your volunteers to subscribe to school specific events or topics you can filter those volunteers who subscribed to one or more newsgroup.

*The report parameter page works from the top down. Just select the items that you want to adjust and you can leave the rest.

You have several Output Options for your report. You can View HTML, which displays on your browser; Generate PDF to print out the report; Export Excel to create a XLS for further processing or CSV/Word Merge to generate a file for merging with MS-Word.

*You will have the opportunity to Generate a PDF or Export to Excel, even after choosing the View HTML. Selecting that option first is a good way to see that you have gathered the correct report data first.

Hours Logged Reports

The Layouts for Hours Logged reports include –

Pin Hours - This summary report displays the total hours and number of opportunities that a volunteer has logged, or has been logged on a volunteer record. This is the most widely used layout for volunteer recognition and reporting on community engagement.

By Volunteer - This layout drills down to each opportunity a volunteer has worked and recorded hours to. It is most useful if you are trying to confirm that volunteers are logging hours to the correct activity.

Daily Time Log - To get down to the individual, day-by-day hours recorded use this layout. It shows each time a volunteer logged hours, whether through their account or via the EZVKiosk. This layout is most commonly used for auditing and correcting inaccurately entered hours. *This report layout gives the most data for each profile and each volunteer session.

Campus Hours - If you want a view of volunteer hours by campus and volunteer affiliation use this layout. It will show hours for Parent, Partner, Student, etc. affiliations at each campus.

RĒ·LĀ·TRIX@
K12 Community Engagement Solutions

The filter parameters for Hours Logged reports include –

Hours Calculated From (IMPORTANT) – Because **EZVolunteer** records hours from all schools where a volunteer works, you need to choose whether you want those hours reported or only the hours logged at your school. *If your Principal asks for the hours logged at your school, please choose the 'Only Selected School' option, so you get the correct hours logged at your school only.

Schools – District administrators can run Hours Logged reports from multiple schools, while school coordinators can run this report at their school.

Relationship To Schools – If you want to limit whether a volunteer has registered at your school or another, then you can use this filter parameter.

Opportunity Type – To limit hours reported to specific types or categories of activity use this parameter. For example if you want to know how many hours were logged for mentoring you can select just that opportunity type and only hours from opportunities flagged as mentoring will be included.

Volunteer – This is where you can limit the report to specific volunteers on your list.

RELATRIX@

K12 Community Engagement Solutions

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

Start Date Range (IMPORTANT) - If you only want hours calculated for a specific date range use the start and end dates. This is most important at the end of the year when you are reporting on volunteer hours for the current school year.

Hours Logged - Because lots of your volunteers may have few or no hours logged, you can limit your report to just those with hours above or below certain thresholds or in a specified range.

Kiosk Reports

With Kiosk Reports you can limit reporting to just what is/has been happening at your EZVKiosk. If you are not using our EZVKiosk these reports are not for you. If you are then you can use them for either Volunteer or Visitor tracking, or both.

Kiosk Report Layouts include -

Kiosk Activity - This layout reports each volunteer or visitor that signed in; when they signed-in and out; and what their purpose was.

Visitor Screening - This layout is specifically for visitors and shows the status of their Sex Offender Registry screening. You have the additional option of searching by name

Kiosk Summary Daily, Weekly, Monthly - Outputs the counts for how many sign-ins and outs you had by day, week or month throughout the school year.

You can filter your Kiosk report layouts by Volunteer, Visitor or both if you want to focus on one or the other. You can also filter most layouts by Date Range, and in some cases by specific activity or purpose of visit.

RĒ·LĀ·TRIX@

K12 Community Engagement Solutions

Relatrix Corporation
1153 Bergen Parkway - M135
Evergreen, CO 80439
Ph: 800-570-6234
Fx: 720-457-3886

NOTE: For more details on using the **Visitor Management Module** of **EZVolunteer** check out our Online Help.

Other Resources

You can learn more about **EZVolunteer** and how to use it as a school staff member from these resources.

1. **FAQs** – https://relatrix.freshdesk.com/support/solutions/17000006448
2. **Online Help** – https://relatrix.freshdesk.com/support/solutions/17000033927
3. **Training Videos** – http://www.youtube.com/relatrixtraining
4. **Chat With Us** – https://purechat.me/relatrix_support