Standard Operating Procedure: Volunteer Matters
Youth Compliance
As of 6/03/2025

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PROGRAM OVERVIEW

Volunteer Matters is a software system that allows institutions a mechanism to document University volunteers and/or staff/volunteers of youth activities. Volunteer Matters (VM) is not required to be used by an institution. VM allows volunteers and/or staff to register for an activity and complete screening and training requirements.

The institution must have an annual registration process for covered activities to satisfy requirements of UW System Policy 625, Section 6.C.1. This information includes collecting for each activity: 1) the date and time of activity, 2) primary contact, and 3) authorized adult names, contact, screening and training.

The VM system links directly to HireRite, which is the portal that allows staff to compete a Criminal Background Check as part of certain volunteer requirements. This training guide provides details on using the VM system.

VM Features

- Add Volunteer Activities for public invitation
- Customize activity (project) volunteer requirements
- Customize credentials (requirements) for volunteer positions, e.g. training videos, CPR
- Portal for volunteer/staff to accept an activity (position) invitation and complete requirements
- Links to HireRite for Risk Profile Criminal Background Checks

Campus Administrator	Program Organizer/Director	Volunteer
1. Request Administrative Rights 2. Set Up Credentials 3. Manage Contact Database	1. Create Projects 2. Update Project Set Up Details 3. Assign Project Organizer 4. Create Project Needs (positions, credentials) 5. Assign Volunteers 6. Send Invitations 7. Monitor Credential Assignments 8. Use Reporting Tools 9. Manage Contact Database	▪ View Volunteer Dashboard for assigned activities ▪ Find a Volunteer Opportunity – or “Project” ▪ Complete Volunteer Project Assignments ▪ Update Profiles

Program Access Help

UW Shared Services is available to assist with the following:

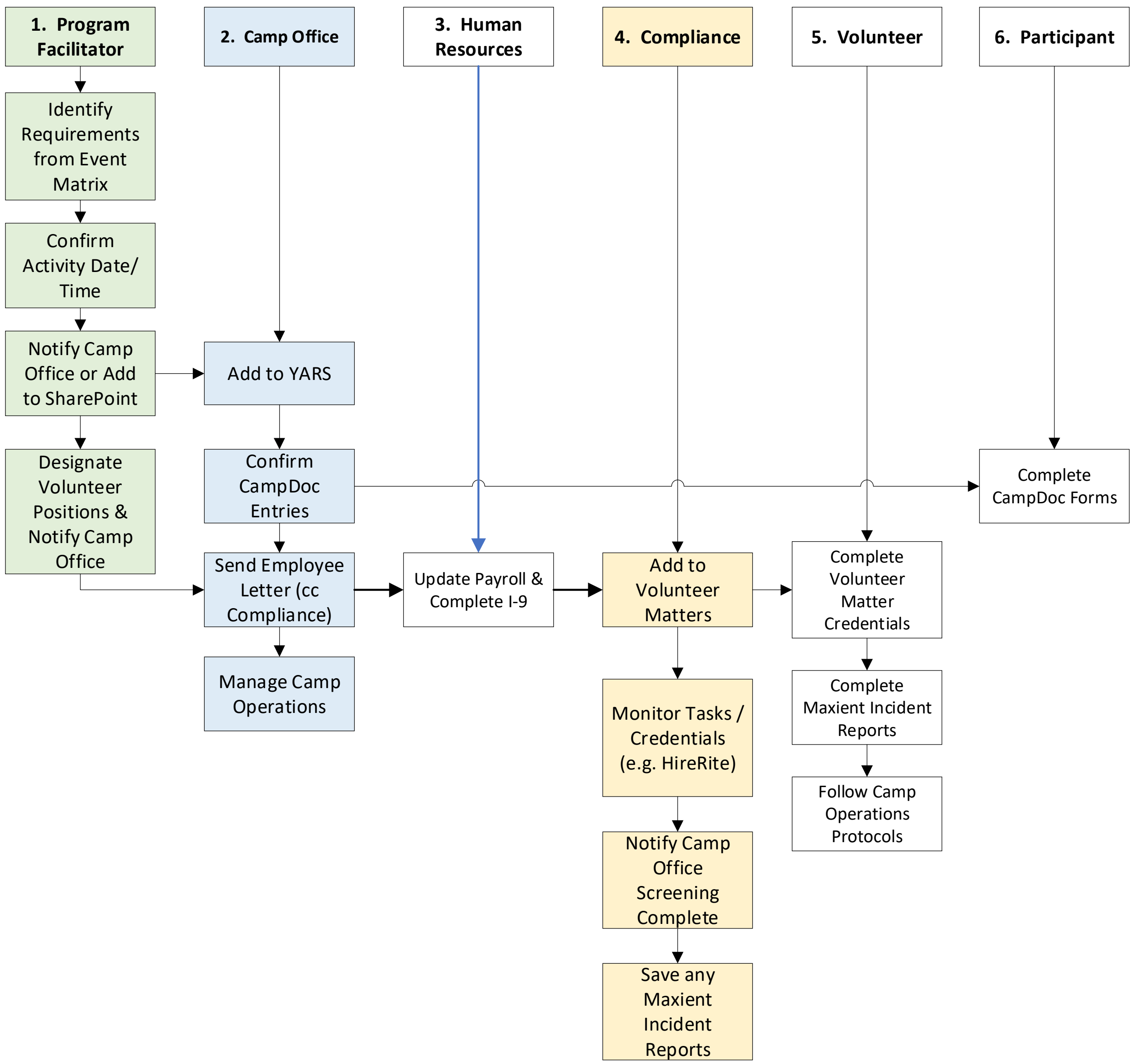
- Add new administrators or project organizers
- Add/update campus-specific onboarding credentials
- Make changes to system configuration (application forms, database configuration, portal branding, default messaging)

VM System Contact: serviceoperations@uwss.wisconsin.edu
888-298-0141

HireRite Help: angela.schultz@uwss.wisconsin.edu

Volunteer Matters Help: Email support@volunteermatters.com
Volunteer Matters Calendar Invite: Support Quick Call

Process Flowchart



Note: non-youth volunteers bypass the Camp Office actions.

See also *Reference - HireRite Adjudication*.

Definitions

Campus Administrator: the individual assigned campus access with administrator rights to create new volunteer projects and manage credentials.

Program Organizer: the individual coordinating the activity, like a Camp Director or designee. It is the Program Organizers responsibility to create the activity, manage profiles and credentials, and monitor volunteer invitations. The Campus Administrator will create a project and assign to a Program Organizer.

Credentials: the documented requirements a volunteer is required to obtain to hold a position. Credentials are set by the Program Organization. Specific credentials not listed within VM are added by the Campus Administrator through UW System Shared Services. Credentials include electronic agreements, certifications needed for the position, criminal background checks, and training.

General Volunteer Project: a project designated as the placeholder for general volunteers that are outside of youth activities. These volunteers only receive the General Volunteer Agreement. This project is always labeled by year: *2024 General Volunteers*

Invitation: once a volunteer selects interest in a project volunteer position, they will receive an invitation, which directs them to complete the required credentials for that project's position.

Risk Profile: this describes the assigned risk profile – or **position** - for a project volunteer position. These profiles – or positions – range from basic: one-time volunteer, Authorized Adult, or Designated Adult to targeted positions such as Health Services Staff or Camp Director. Each profile is assigned specific Credentials. Targeted profiles will need to be created within Volunteer Matters.

Project: this refers to a covered activity, or program that Camp Director needs volunteers for. Unlike the YARS System, a Project is the covered activity – or session – not the program. A project is any event, program or initiative around which you would like to organize volunteers. You must be an 'administrator' in order to create projects. Projects have a description (name, image, summary, goals, contacts, address, etc.), they have categories (areas of focus, intended beneficiaries, impact areas, etc.), they have rules for publishing the project in the Project Catalog, and they have Needs (the things people are actually signing up for – shifts, tasks, items, positions). 'Organizers' can edit, manage assignments to, and report on projects. However, an administrator must assign them to the project first.

Project Catalog: the catalog contains all active and published volunteer projects that have current/future needs from which an individual can select to volunteer. The project catalog is the central resource for volunteers to search, browse and sign-up for your volunteer project needs. When you advertise for prospective or registered volunteers to sign-up to help, you are typically asking them to visit the Project Catalog in order to find a need they would like to fulfill. The project catalog shows all projects that have current or future needs, whose publish start date is on or before today, whose publish end date is on or after today, and that is not hidden. When creating a project you can specify the publish dates as well as a publish mode that determines which types of users should see the project in the catalog (public, volunteers, administrators, or hidden).

Project Dashboard: Each project in VolunteerMatters includes a "Project Dashboard" to provide a high level view of project analytics and data for administrators and organizers. The available summary information panels are:

- Project Details
- Project Impact
- Project Staffing (Next 30 Days)
- Needs With Invalid Credentials
- Recent Assignments (Past 7 Days).
- Email Notification

Project Needs: There are four types of needs you can add to a project. You should add needs of at least one type but you may have multiple types of needs. Needs can be shifts, tasks, items, or positions.

Project Need: Shifts: Needs where a volunteer is expected to work a specific role (job) during a predetermined time slot (specific date and time). A project may have many different roles (e.g., greeter, helper, worker, cleaner) or you may have one role to which all people may be assigned.

Project Need: Items: Needs where you are asking volunteers to donate or lend item(s) to your cause (food, tools, clothing, etc.). You may define the total number of a particular item you need and the volunteer can specify how many they will bring. Items have a due date as to when you expect them to be delivered.

Project Need: Tasks: Needs where you are asking a volunteer to "do" something but the work can be done according to the volunteer's schedule. You are only asking the task be completed by a specified date.

Project Need: Positions: A position is a long-term commitment to take on a more staff-like role for the project or organization. An example might include a volunteer manager, project chair, or committee member. Volunteers would be committing to this position for a period that spans days, weeks, months, or even years. This is quite different from a "role" which describes a particular job relating to shift work. Many times, the work related to a position is unscheduled and therefore done on a volunteer's own time.

Project Assignments: Once someone signs-up for a need or they are appointed by an administrator they are “assigned” to that need. When we manage assignments this means we are managing those who are or will be assigned to a specific need on a project.

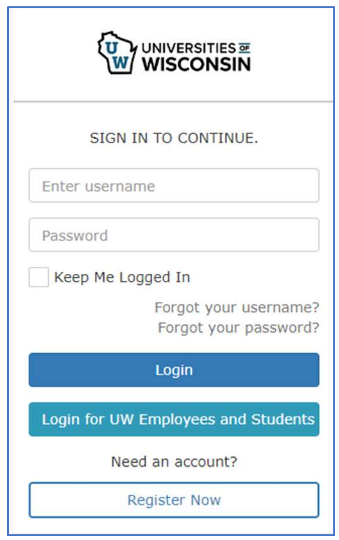
ACCESS VOLUNTEER MATTERS

There are four types of users for VolunteerMatters:

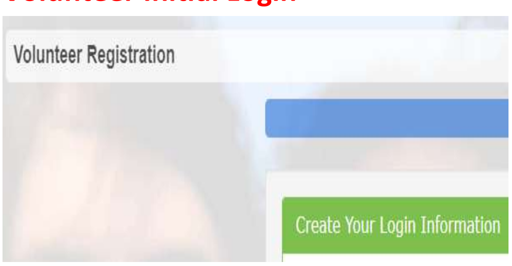
Administrator	https://uw.volunteermatters.org/login	Login to update Credentials and Risk Profiles
Program Organizer	https://uw.volunteermatters.org/login	Use *Login for UW Employees and Students* to add and manage Projects (Camps)
University Employee/Volunteer	https://uw.volunteermatters.org/login	*Login for UW Employees and Students* to search for a volunteer opportunity
Public Volunteer	https://uw.volunteermatters.org/register Volunteer Matters Project Catalog	First time user must register Open the VM Project Catalog to search for a volunteer opportunity by campus

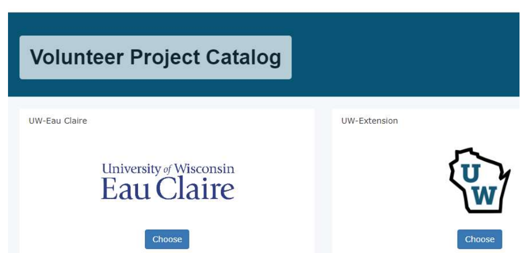
Administrator Login

Employee Volunteer Login



Volunteer Initial Login





CAMPUS ADMINISTRATOR FUNCTIONS

Summary Duties

- Request Administrative Rights
- Set Up Credentials [Manage/Audit Credentials PDF]
- Manage Contact Database

General Volunteers Outside of Youth Activities: Refer to Reference – General Volunteer section at the end of this SOP aid.

Request Administrative Rights

Contact UW Shared Services for any requests to add administrative rights for other individuals on your campus.

1. Request the *Request Additional Administrative Rights and Credentials Template* from UW System Shared Services
2. Fill out the *Administrative Rights* tab
3. Submit to ServiceDesk@support.wisconsin.edu

Manage Credentials

Use the Manage/Audit Credentials PDF or follow instructions below.

Credentials are assigned to volunteers based on their risk profile – or position. The risk profile determines what type of credentials the volunteer will need. A credential is a requirement a volunteer must attain or complete in order to perform certain actions within the volunteer portal. Some credentials are global and are required of all volunteers (signing a waiver, agreeing to a code of conduct, attending a training) and other credentials must only be attained or completed to sign up for a specific project need (e.g.: training, background checks, etc.).

The Pre-College Liaison is responsible for managing the credentials within the Volunteer Matters System, this includes 1) managing volunteers who have been assigned credential tasks to complete prior to a covered activity, and 2) adding custom credentials to VolunteerMatters (see next section).

Only a Precollege Liaison and UW Shared Services can adjust credential statuses. The credential set up will determine if you can edit an expiration date.

Configure Email Preferences

Configure your credential email preferences in 'My Profile' to send daily emails AND/OR visit the credential dashboard daily to review any credentials with a ***'Review'*** status. Most credentials will automatically move into an Approved status. But there will be instances where some additional administration is needed. See the next steps below for those. For assistance in setting credential email preferences within VolunteerMatters, see https://support.volunteermatters.com/hc/en-us/articles/233072748.

Add Custom Credentials

A custom credential is required when there is a unique requirement or training for a position, such as an Archery Instructor. Use the Request Custom Credentials PDF or follow instructions below.

Contact UW Shared Services for any requests for additional credentials custom for your campus.

Credentials can be set up to automatically approve upon application (e.g., electronically signing an agreement) or have an approval process (an administrator must review documentation before granting approval or integrated approval with a 3rd party provider).

1. Request the *Request Additional Administrative Rights and Credentials Template* from UW System Shared Services
2. Fill out the *Extra Credentials* tab form

Campus	Credential Name	Credential Description	Credential Type	Volunteer Instructions	Agree-To Statement
UW-Green Bay	CPR Certification	CPR Certification required for volunteers serving as health supervisor staff.	*Certification*	Complete CPR Certification and upload your certificate from American Red Cross or American	I agree to provide my CPR Certifica

3. Submit to ServiceDesk@support.wisconsin.edu

Note: Any changes where credential has a certificate file attached cannot be changed by VM through a mass format file, otherwise the certificate will be deleted. For these changes you must complete them manually, one volunteer at a time.

See *Reference Section – Credential Set Up* for current credential set up language.

The following credential settings are part of the template:

Field	Description
Credential Name	What the Project Director will assign to a volunteer. Example: UWGB Medication Management
Credential Type	▪ Electronic Agreement (one they will electronically sign in the system) ▪ Certificate (requires PDF upload) ▪ Video ▪ Extra Training ▪ Embedded Training Almost all custom credentials will be either in 3 sections: Agreement, Certification, or Learning. For a high level view of credentials click here.
Active Status	Change to TRUE, unless existing Credential you wish to remove from active status, in that case change to FALSE
Volunteer Instructions	These are the instructions for the volunteer on how to complete the credential or what they need to do. These instructions are available when the credential is being applied for and from the credential on the volunteer's profile. If you add a full URL to these instructions, it will be converted to a clickable hyperlink. **Refer to Credential Description section below for examples of written instructions to copy and paste.** Example: Volunteer will review the Camp Operations Guide and understand and perform the procedures outlined within during the program. This includes check in/check out, medication disbursement, reporting incidents and to whom, and other camp operation procedures. The Guide may also be found on the Youth Protection - Compliance - Safety, Risk and Compliance (uwgb.edu) webpage.
Agree-To Statement	This is the language that the volunteer is consenting/agreeing to. This is where you add the language to which the volunteer should agree/attest. After the application process, this statement is shown on the credential on the contact record and on the volunteer's my profile page (the exact language to which they attested). Example: I understand that participation as a volunteer requires me to adhere to the practices and procedures outlined within the Operations Manual on the UW-Green Bay campus. I have read, understand, and agree to abide by Operations Manual as part of the responsibilities of the volunteer position.
Signature Type	This setting is what will be displayed to the volunteer and what is required from them to submit. The options are: ▪ None - You may present an "Agree-To" statement that is implicitly affirmed by the fact that it will be presented to the volunteer but they only have to click "continue" to proceed. This should not be used for any agreement or credential where an explicit affirmative response is required. ▪ Checkbox - The volunteer simply needs to check a box to agree. ▪ Initials - The volunteer needs to enter their initials to agree. ▪ Full Name - The volunteer needs to enter their Full Name to agree.
Allow File Upload	Determines whether to allow the Volunteer to upload files to be attached to the credential application. Click here for more information on credential file uploads.
Credential Always Required	This determines if the credential is required of ALL volunteers. This will make it part of the application process and will be applied automatically to all project needs (roles/positions). Those not required will be placed on specific project needs when they are necessary.
Default Status	This is the initial status for your credential after the volunteer applies for the credential. Business rules for certain situations may override this setting. Click here for more information on the different statuses. ▪ Approved (no approval process required - typically for electronic agreements only) ▪ Review (a precollege liaison must review and approve). Use this setting if you want to set expiration dates and/or review certificates that have been uploaded (e.g. Lifeguard Cert).

Field	Description
	▪ Submitted (typically reserved for a multi-step review process where an precollege liaison may have to take some sort of action internally before marking it for review)
Expiration Policy	This setting allows you to determine the manner in which the credential is automatically expired by the system. Credentials set to "None" are forever (once they attain the credential it never has to be repeated). Any credentials that expire over time, set either "Duration" or "Annual" according to your needs. Settings to select from include: ▪ None: use this setting to allow update/change of expiration dates within the system. Use of this setting means the expiration date is ALWAYS BLANK. ▪ Duration: Set the credential to expire after X number of months, e.g. 24 (2 years). This will be placed in the "Expires After" field below "Expiration Type". ▪ Annual: Allows you to set a month and date that the credential will expire each year. This will be placed in the "Expiration Month" and "Expiration Day" fields below "Expiration Type".
Expires After	Enter the automatic expiration date language. Example: 2 Years from today The system will not allow you to update/edit this date later. Do not use this and Expiration Policy for any credential that you may need to edit an expiration date to.
Expiration Month	Example: Month Uploaded
Expiration Day	Example: Date Uploaded
Exemption Age Direction	This value is used to determine exemptions for this credential based on age. The value of this field, in conjunction with the "Exemption Age Limit" value, determines if a volunteer is exempt. ▪ Below ▪ Above If "Exemption Age Direction" is "Below," then a volunteer with an age below the "Exemption Age Limit" will be exempt until they reach that age. If "Exemption Age Direction" is "Above," then a volunteer with an age above the "Exemption Age Limit" will be exempt from the credential (without expiration). However, if a precollege liaison updates the credential, other expiration policies may apply. If you want the credential to not be exempt, set exemption as Exemption: Below Age Limit: 0
Exemption Age Limit	This value is used to determine exemptions for this credential based on age. The value of this field, in conjunction with the "Exemption Age Direction" value, determines if a volunteer is exempt. If "Exemption Age Direction" is "Below," then a volunteer with an age below the "Exemption Age Limit" will be exempt until they reach that age. If "Exemption Age Direction" is "Above," then a volunteer with an age above the "Exemption Age Limit" will be exempt from the credential (without expiration).

Audit Credential Dashboard

The Precollege Liaison is responsible for the overall integrity of volunteerism risk management policy and the implementation of that policy. Electronic tracking enables them to perform instant audits on the status of all volunteer credentials with a specific emphasis on organization-wide credential conflicts, and denied and exempted credentials. Audits can be performed as often as the Policy Auditor feels necessary.

Program Facilitator will monitor volunteer assignments – or credentials – for each event. Administrator will complete an audit weekly/monthly of credential conflicts to ensures integrity of the data and volunteer compliance.

Process

Review credential conflicts across all projects to assure they have been given the proper attention by Credential Administrators and Project Organizers.

1. **Audit Denied Credentials**

   For assistance with understanding the Credential Status Reporting, see https://support.volunteermatters.com/hc/en-us/articles/360011314074.

2. **Audit Exempt Credentials**

   All changes to an exempt status should be accompanied by notes explaining the reason for the exemption as well as a history record showing when and who made the change.

   Review notes to assure policies for exemptions have been followed.

   Exemptions due to the age of the applicant may be assigned automatically by the system (i.e., a volunteer was exempted by the system because they were too young or too old) and exemptions may be made manually by UW Shared Services with regards to a background check, etc... In some instances providing volunteers with an exemption may be used to 'work around' policy. It is important that we review exempt credentials and validate the exemptions were applied properly.

   Most credentials should have an APPROVED status not EXEMPT. An Exempt status appears whenever Admin makes changes to a credential. For example, a CBC is approved, unless Admin reviews and makes a change, then the status is changed to Exempt.

3. **Spot-Check Application of Risk Profiles to Volunteer Opportunities**

   When defining volunteer opportunities on their project (shifts, positions, items and tasks), Program Organizers must properly associate the required credentials. Review project needs to determine if the risk profiles have been applied properly. If they have not, contact the offending Program Organizer to alert them to the error so that they may a) correct all current/future assignments and b) review training materials and this guide for training on the policy and tools for implementation. We recommend running the cross-project Need Configuration report within VolunteerMatters (which include credentials associated with project needs), see https://uw.volunteermatters.org/admin/projects/reports/need-configuration.

   For assistance in discovering who the Program Organizer is within VolunteerMatters, see https://support.volunteermatters.com/hc/en-us/articles/360011401113.

   For assistance on assigning credential requirements within VolunteerMatters, see https://support.volunteermatters.com/hc/en-us/articles/360011051014.

PROGRAM ORGANIZER FUNCTIONS

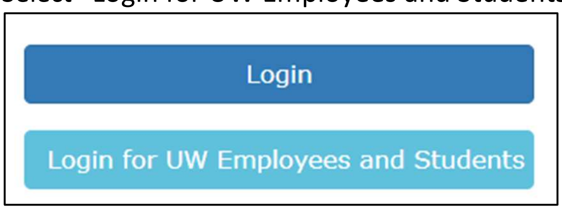
The Pre-College Liaison will create your project (program) for you in Volunteer Matters. The project created for you will not contain job roles, but instead it will serve as the project framework or “shell”. The Pre-College Liaison will enter the Project Name, Publish Start Date, Publish End Date, and Address of the Project. The Pre-College Liaison will then assign the Project to you.

Note: in the interim, the Administrator will complete Program Organizer functions until UWGB establishes different protocols.

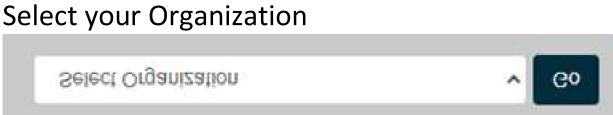
- Create a new volunteer project [Create a New Volunteer Project PDF]
- Assign to Program Organizer [Assign to Organizer PDF and Add Organizer PDF]
- Add Project Needs (risk profile, credentials, items, shifts, tasks)
- Assign Positions / Send Invitations
- Monitor Credential Assignments
- Use Reporting Tools
- Complete Staff Roster
- Manage Contact Database

Login to Volunteer Matters

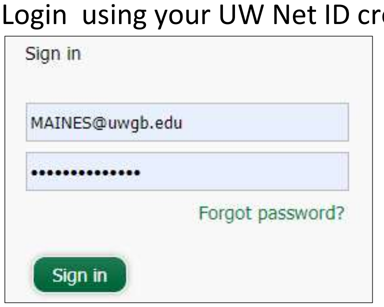
1. Open a web browser and navigate to https://uw.volunteermatters.org/login.
2. Select “Login for UW Employees and Students”



3. Select your Organization



4. Login using your UW Net ID credentials:



Definitions

Project Management: Program Organizers within the University of Wisconsin VolunteerMatters system are assigned to projects specific to their programs by the Precollege Liaisons. The program organizer can manage most aspects of the project and this document will go over those areas.

First, here are some basic definitions of the various elements in a VolunteerMatters project. For the most part you will not be dealing with most of this information, but having that background information is always helpful.

Volunteer Project: A project is any event, program or initiative around which you would like to organize volunteers. You must be an 'administrator' in order to create projects. Projects have a description (name, image, summary, goals, contacts, address, etc.), they have categories (areas of focus, intended beneficiaries, impact areas, etc.), they have rules for publishing the project in the Project Catalog, and they have Needs (the things people are actually signing up for – shifts, tasks, items, positions). 'Organizers' can edit, manage assignments to, and report on projects. However, an administrator must assign them to the project first.

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Project Dashboard: Each project in VolunteerMatters includes a "Project Dashboard" to provide a high level view of project analytics and data for administrators and organizers.

Project Needs: There are four types of needs you can add to a project. You should add needs of at least one type but you may have multiple types of needs. Needs can be risk profiles, items, shifts or tasks..

> **Risk Profile / Positions:** A position is a long-term commitment to take on a more staff-like role for the project or organization. An example might include a volunteer manager, project chair, or committee member. Volunteers would be committing to this position for a period that spans days, weeks, months, or even years. This is quite different from a "role" which describes a particular job relating to shift work. Many times, the work related to a position is unscheduled and therefore done on a volunteer's own time.
>
> **Items:** Needs where you are asking volunteers to donate or lend item(s) to your cause (food, tools, clothing, etc.). You may define the total number of a particular item you need and the volunteer can specify how many they will bring. Items have a due date as to when you expect them to be delivered.
> **Shifts: N**eeds where a volunteer is expected to work a specific role (job) during a predetermined time slot (specific date and time). A project may have many different roles (e.g., greeter, helper, worker, cleaner) or you may have one role to which all people may be assigned.
>
> **Tasks:** Needs where you are asking a volunteer to "do" something but the work can be done according to the volunteer's schedule. You are only asking the task be completed by a specified date.

Project Catalog: The project catalog is the central resource for volunteers to search, browse and sign-up for your volunteer project needs. When you advertise for prospective or registered volunteers to sign-up to help, you are asking them to visit the Project Catalog in order to find a need they would like to fulfill. The project catalog shows all projects that have current or future needs, whose publish start date is on or before today, whose publish end date is on or after today, and that is not hidden. You may specify the publish dates as well as a publish mode that determines which types of users should see the project in the catalog (public, volunteers, administrators, or hidden).

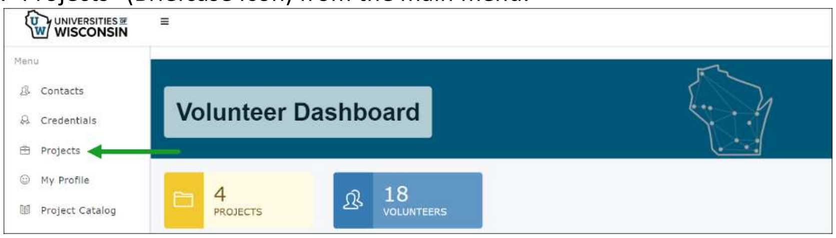
Assignments: Once someone signs-up for a need or they are appointed by an administrator they are "assigned" to that need. When we manage assignments this means we are managing those who are or will be assigned to a specific need on a project.

Create Volunteer Project

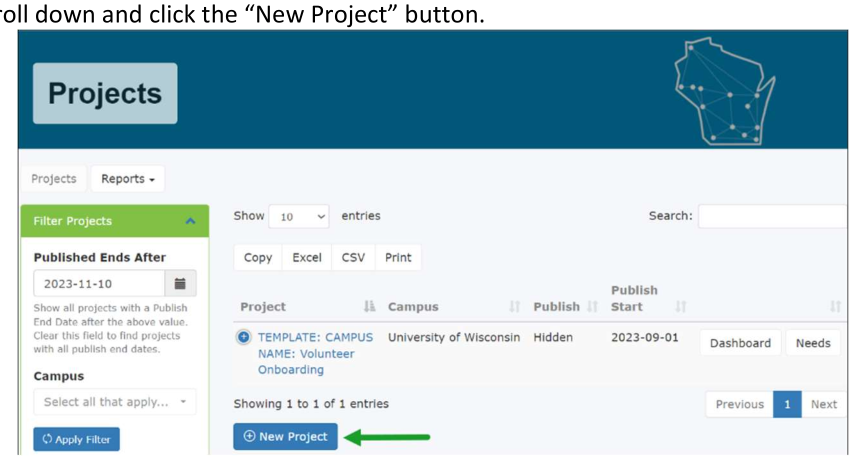
A Project should be created for every sponsored program where volunteers are necessary for program operation. Use the [Create a New Volunteer Project PDF] or the instructions below.

General Volunteers Outside of Youth Activities: UW-Green Bay creates an annual project to document general volunteer activities that are not related to youth activities. This project is labeled: *2024 General Volunteers*

1. Log into VolunteerMatters with the Project Administrator role.
2. Click "Projects" (Briefcase Icon) from the main menu.



3. Scroll down and click the "New Project" button.



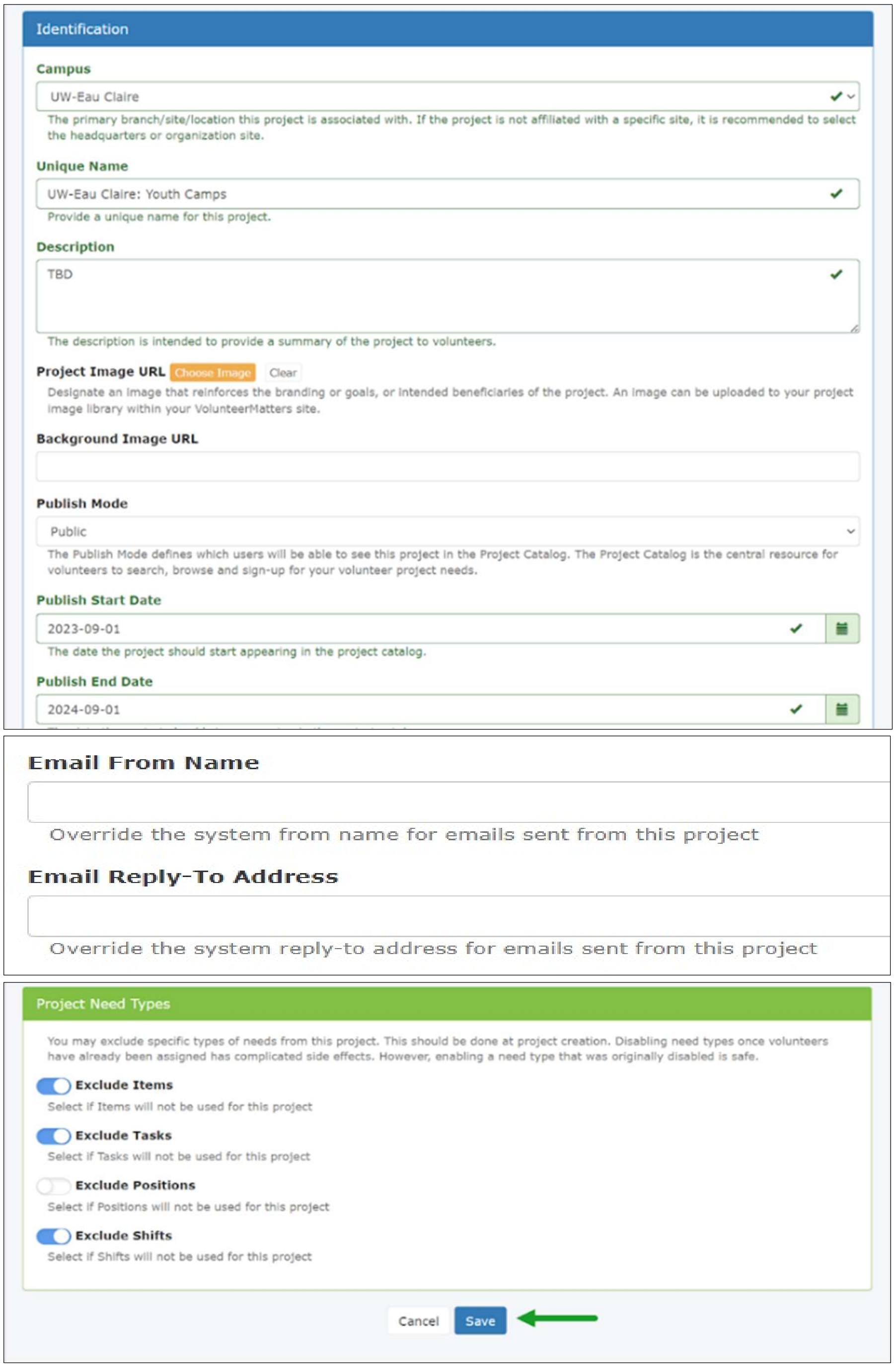
4. Leave all default settings except the following.

Section	Field	Details
Identification	Campus	Primary site project is associated with. Should always be your campus.
	Unique Name	Name for the Project/Camp
	Description	Good description of the camp that the volunteer will see.
	Project Image	Add an image to link to the project (for display)
	Publish Mode	Choose one. Only use "public" if wish to display to the public.
	Publish Start Date	
	Publish End Date	System recommends year as 2050
Extended Information	Generally leave default settings	
Settings	Send Automated Thank You	Toggle to deactivate; generally do not need to send a thank you email every time an assignment is completed
	Enable Volunteer Feedback	Toggle to deactivate
	Send Automated Assignment Reminders	Recommend leaving the default setting here.
	Email from Name	Update to the Project Organizer Name.
	Email Reply-To Address	Update to the Project Organizer Email Address

Section	Field	Details
Project Need Types	Exclude Items	Only toggle to deactivate if you will not be using these "Needs". However, it is fine to leave as is.
	Exclude Tasks	
	Exclude Positions	
	Exclude Shifts	

5. Click the "Save" button.

Example



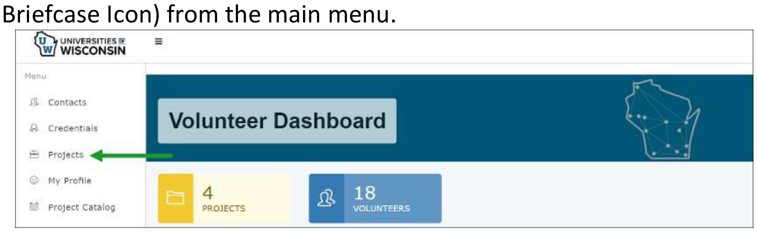
Assign Project Organizer

A Project should be created for every sponsored program where volunteers are necessary for program operation. An individual must be assigned by Shared Services as an Organizer, otherwise they cannot be listed.

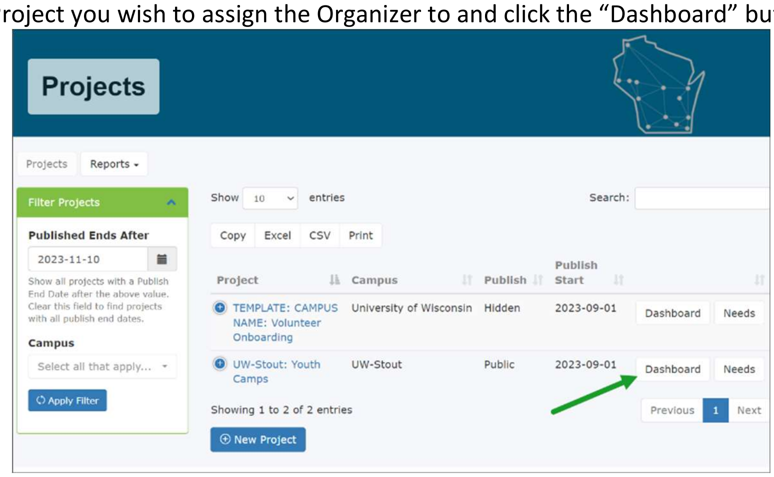
Use the [Assign to Organizer PDF] or use the instructions below.

If your Program Organizer has never logged-in to the VolunteerMatters portal in the past, please ask them to first visit https://uw.volunteermatters.org and login with their UW Net ID. This will automatically create a user in the VolunteerMatters portal that will then be available to the UW Shared Services team to add the Organizer security role and the proper Contact Segment/Branch Restriction to. After they login, please contact UW Shared Services to add the proper rights.

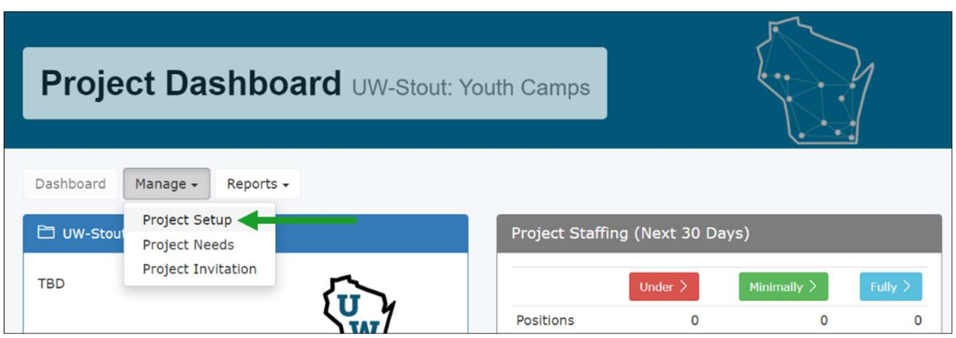
1. Log into VolunteerMatters with the Project Administrator role.
2. Click "Projects" (Briefcase Icon) from the main menu.



3. Locate the Project you wish to assign the Organizer to and click the “Dashboard” button.

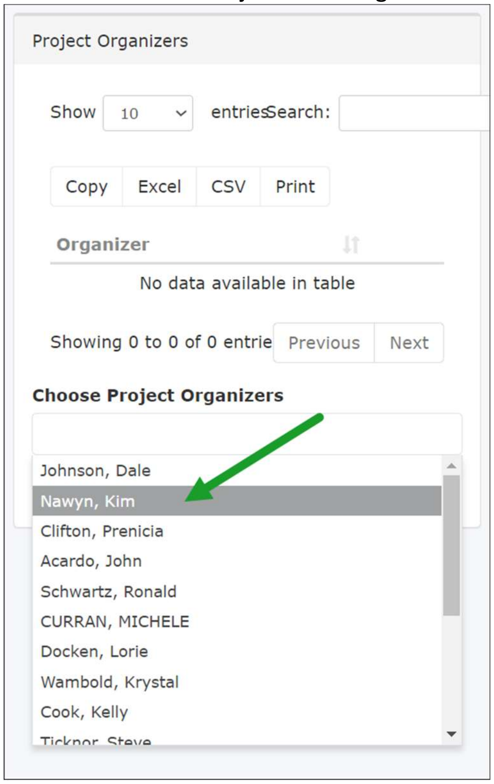


4. This will open the "Project Dashboard" page. Click the "Manage" drop-down button and select "Project Setup".

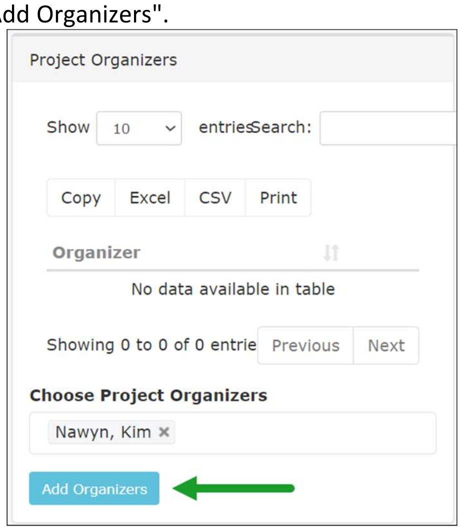


5. Once on the "Project Setup" page, you will see the "Project Organizers" section (typically on the right column - depends on your browser width). Click in the "Choose Project Organizers" section and then select

the organizer(s) desired. NOTE: You can start to type in the field to filter the organizer results in the drop-down. The list will include anyone with the Organizer role on their record. Even as a Project Administrator you may want to be added to a Project as an Organizer for notification purposes.



6. Then click "Add Organizers".

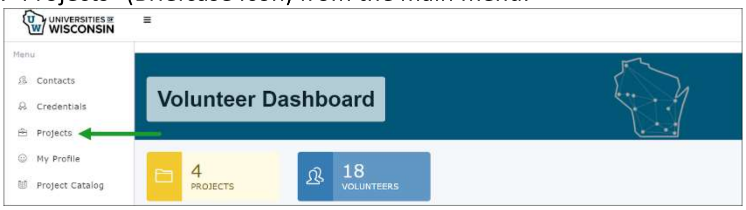


This will make that contact an organizer on the project the next time they log in. They will need to log out and back in if they were previously logged in.

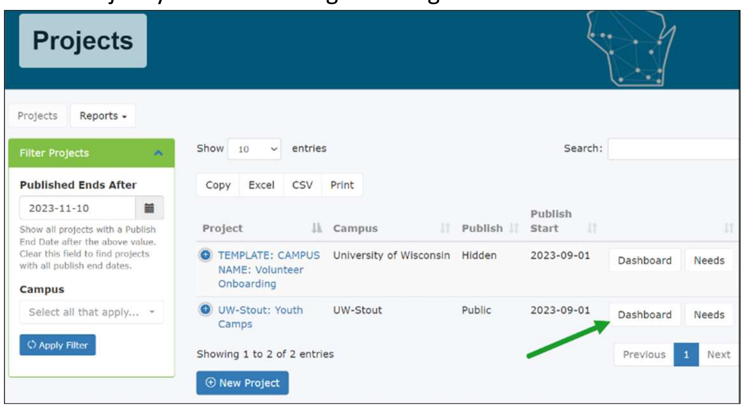
6. Notify Program Director when project is available.

Assign Organizer to an existing Project

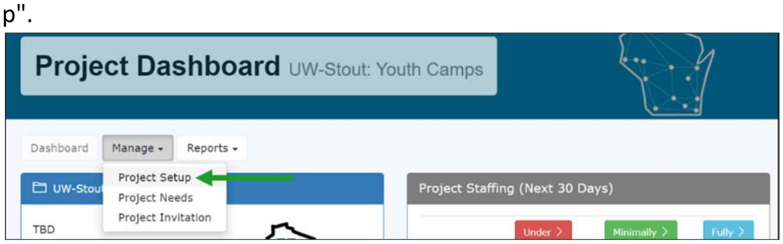
1. Log into VolunteerMatters with the Project Administrator role.
2. Click "Projects" (Briefcase Icon) from the main menu.



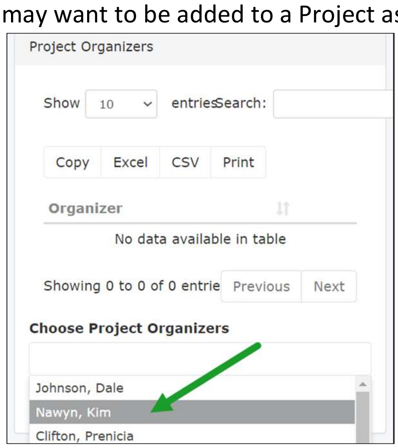
3. Locate the Project you wish to assign the Organizer to and click the “Dashboard” button.



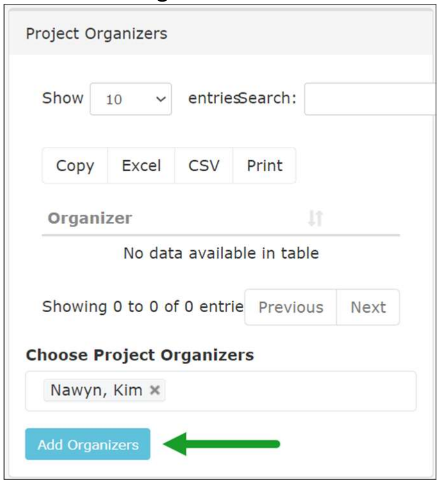
4. This will open the "Project Dashboard" page. Click the "Manage" drop-down button and select "Project Setup".



5. Once on the "Project Setup" page, you will see the "Project Organizers" section (typically on the right column - depends on your browser width). Click in the "Choose Project Organizers" section and then select the organizer(s) desired. NOTE: You can start to type in the field to filter the organizer results in the drop-down. The list will include anyone with the Organizer role on their record. Even as a Project Administrator you may want to be added to a Project as an Organizer for [notification purposes].



6. Then click "Add Organizers".



This will make that contact an organizer on the project the next time they log in. They will need to log out and back in if they were previously logged in.

Add Project Needs - Positions

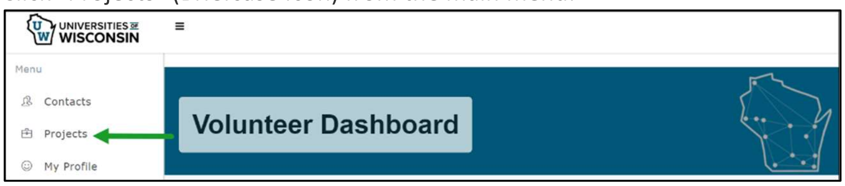
Project needs include position/roles, credentials, or items, essentially what the program needs for the camp to operationally run.

Risk Profile/Position Roles

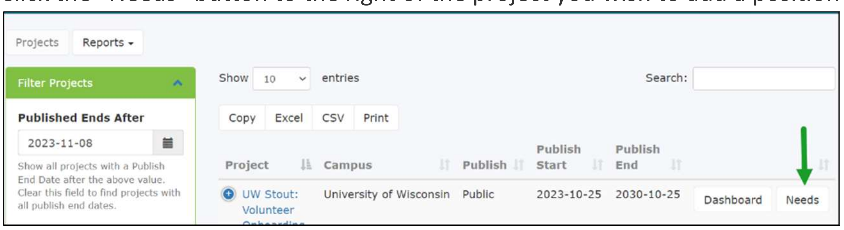
VolunteerMatters includes risk profiles – or positions. Essentially, a risk profile is considered a project position. Targeted positions, such as Health Camp Supervisor, need to be added to each project.

If there is a unique position to the program that also has a specific credential required, e.g. Archery requires an Archery Certification, you will need to create the credential before completing this section.

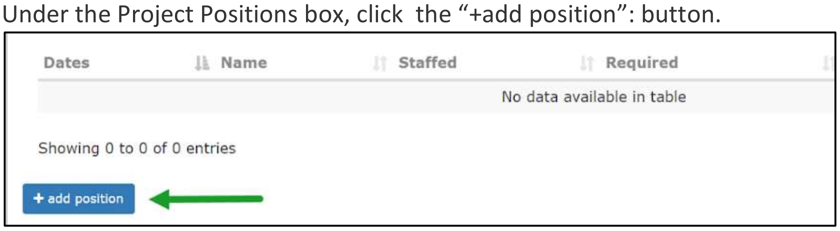
1. Click "Projects" (Briefcase Icon) from the main menu.



2. Click the “Needs” button to the right of the project you wish to add a position to.



3. Under the Project Positions box, click the “+add position”: button.



This will open the Project Position Need configuration page.

4. Add the position information in the following fields:

Name	Enter the risk profile or position (see list below)
Description	List the description for this profile/position.
Default Credited Hours	The number of hours that the position will automatically be credited to the volunteer once they sign up for the position.
Minimum Required	The minimum number of available slots on the position. This is only informational for staffing.
Maximum Required	The maximum number of available slots on the position. Once this number is hit, the position will no longer be available for signup from a volunteer's perspective.
Start Date	List the start date of the project/program.
End Date	List the end date of the project/program.
Minimum Age	Specify a minim age (in years) to sign-u and work this position. Must always be at least 2 years older than the participant age.
Required Credentials	For each position, you may specify one or more credentials that may be required for this position. Click on each credential listed that is required for the position. Refer to *Reference Section Volunteer Training*. For example, one position may require a background check or a medical certification.

Position Descriptions/Requirements

Credentials are set up in Volunteer Matters as follows:

Training Credentials	Option & Duration	Volunteer	Youth Camp Staff/Volunteers				
			Camp Director	Health Supervisor	Staff / Volunteer	Limited Volunteer Minor	Limited Volunteer
CBC	HireRite 2-4 Years	If POT	X	X	X	If POT	Risk Discretion
CPR Certificate	Upload 2 Years			X			
Driver Authorization			Optional	Optional	Optional		
Medication Management DPI	Upload 2 Years			X			
Youth Protection Videos (3)	4 Years		X	X	X		
Camp Operations Manual	Check Box 2 Years		X	X	X		
Youth Agreement	Check Box 2 Years		X	X	X		
Youth Agreement Limited no CBC	Check Box 2 Years						X
Youth Agreement Limited PDF	Upload 2 Years						X
Youth Agreement Minor	Check Box or Upload 1 Year					X	
Volunteer Agreement	Upload	X					

Position	Description	Required Credentials
Health Supervisor	Individual responsible for routine and emergency health care supervision, such as first aid triage, medication management and emergency medical response. This individual must have at a minimum a CPR certification from the American Red Cross. This individual may also be in charge of other Health Staff.	▪ CPR Certification Attachment ▪ Medication Management ▪ Youth Agreement ▪ CBC ▪ Operations Manual ▪ Video Mandated Reporter ▪ Video Sexual Harassment ▪ Video Youth Protection
Camp Director	Responsible for the operation of the program, staff supervision, food and health services, and other supportive services. Must be at least 21 years of age with two or more years of supervisor or administrative experience in an organized camp or children's program.	▪ Youth Agreement ▪ CBC ▪ Operations Manual ▪ Video Mandated Reporter ▪ Video Sexual Harassment ▪ Video Youth Protection
Staff (Paid Position) Volunteer	Responsible for interacting with program participants, complete operational tasks and see to participant safety. Follows operational guidelines including but not limited to participant check in/check out, safety, and reporting incidents. Must be 2 years older than participants in the program and may be asked to complete CPR Certification. Is counted in the supervision ratio. Individual for overnight programs will bunk at the campus while program is in operation and have oversight of participants and the housing area where participants reside.	
Staff/Volunteer Minor	Follows same requirements as staff/volunteer. Must be 2 years older than participants in the program. Minors cannot supervise minors and therefore cannot be included in the supervisor ratio count but are required to complete all the screening and training requirements.	This group signs the Youth Agreement Minor form
Volunteer Limited	*An individual at a covered activity who has no direct interaction with participants* for a limited and defined time (such as a one-time-only basis or a scheduled presentation series) who is never left alone with youth participants and does not share personal contact information with youth participants. e.g., Guest Speakers, Referees, Lifeguard, Private Family Aids, Registration Booth or Camp Errands.	▪ Youth Agreement Limited OR Youth Agreement Limited PDF ▪ Certificate ▪ Risk determines if CBC required Either Agreement may be used; the PDF requires a signed document to be uploaded to Volunteer Matters, the other is an electronic signature.
Volunteer Limited Minor	This category is specific to minors serving an activity in a limited capacity. Example: Girls/Boys Lead GB Camps have a designated role for a select group of minor participants who are attending camp as a participant but are learning leadership.	▪ Youth Agreement Minor Volunteers under age of 18 will require parent/guardian signature

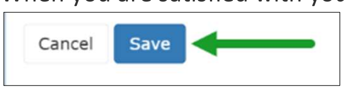
Position	Description	Required Credentials
General Volunteer	*Individual assigned an activity or role outside of youth activities.* See *Reference – General Volunteer Processing* Section. Example: Marinette Theatre for public productions may have minor cast members; each crew and volunteers must sign a Youth Agreement, although this is not a covered activity.	▪ Volunteer Agreement ▪ Potential CBC if in a POT ▪ Youth Agreement Limited

Basic Positions

These are positions identified by UW System not currently used by UWGB but available to use.

Position	Description
Authorized Adult	Individuals, age 18 and older, paid or unpaid, who are authorized to interact with youth participants as part of a covered activity. Authorized adults cannot have unsupervised access to minors.
Designated Individual	An authorized adult who is counted in the supervision ratio for a covered activity. Designated individuals are responsible for ensuring the care and safety of youth participants in covered activities.

5. When you are satisfied with your changes, click the "Save" button.



6. This will return you to the "Project Needs" page.

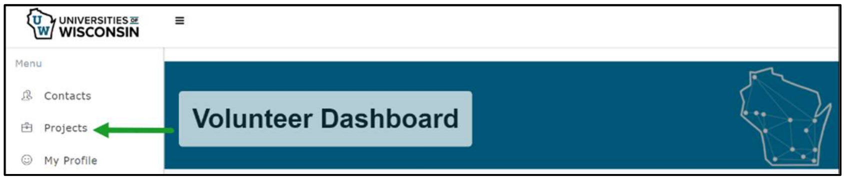
7. Complete Steps 1-4 for each position to the project.

You may assign volunteers at this time using the ASSIGN button. Otherwise, refer to *Assign Project Volunteer* section.

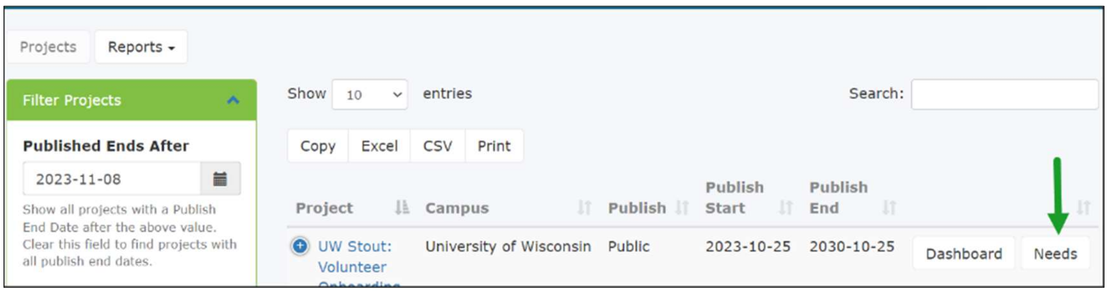
Add Shifts, Tasks, Items

From the Projects Configuration Page, open a specific Project, select Needs and scroll to the identified need you wish to update/add: Shifts, Tasks, Items.

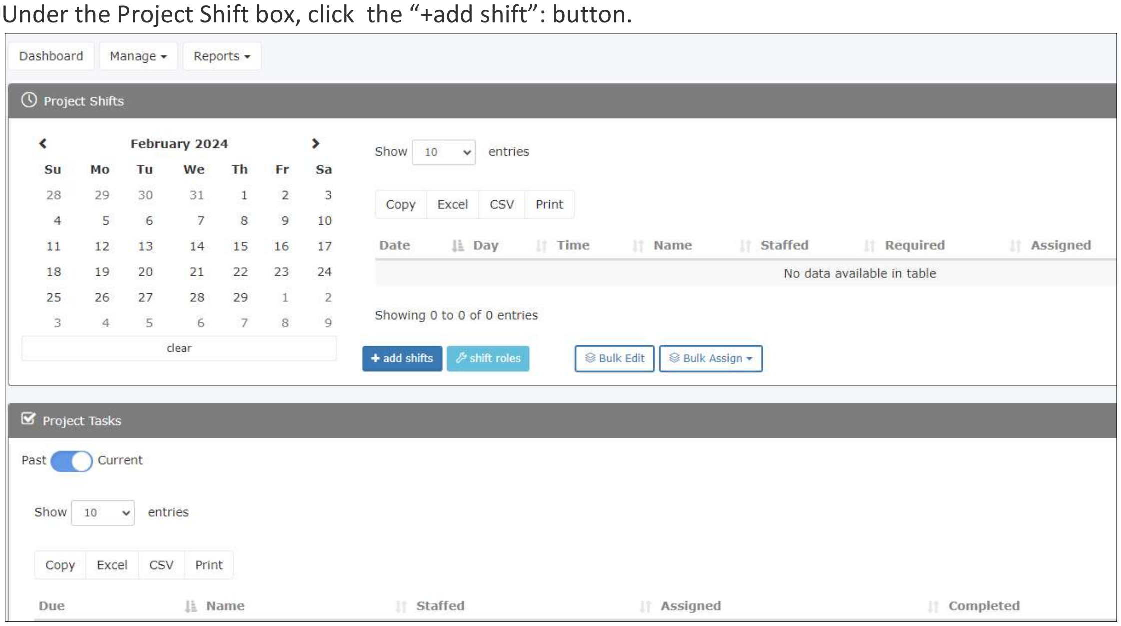
1. Click "Projects" (Briefcase Icon) from the main menu.



2. Click the “Needs” button to the right of the project you wish to add a position to.



3. Under the Project Shift box, click the “+add shift”: button.



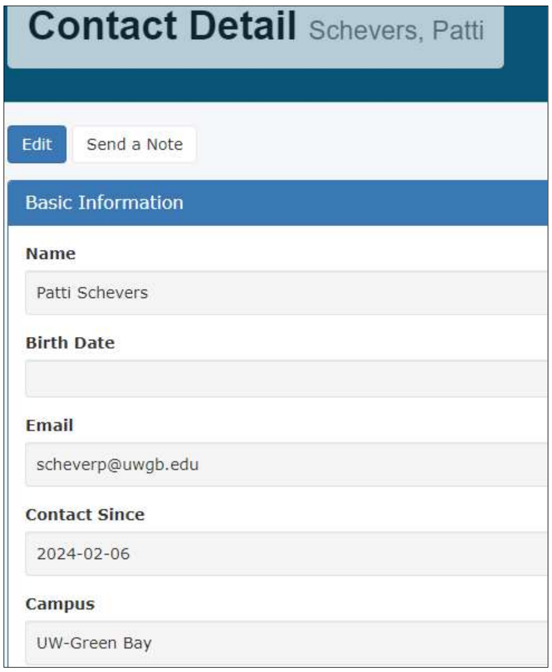
This will open the configuration page to add the specific need required.

Add Volunteers to Contact List

You will need to create a contact for every volunteer in order to assign anyone to a project. You only need to do this once.

Refer to Invite

- Enter Volunteer information



Assign Project Volunteer

This section refers to assigning specific individuals to project positions. Once your project needs are set, you may assign specific volunteers to a position. Other options may include allowing the public to self-assign to a volunteer position. However, you may have specific individuals in mind for positions.

This step is often triggered by receipt of a temporary employee offer letter that Administrator is copied on.

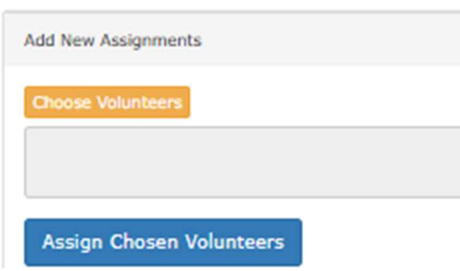
Assigning a volunteer does not automatically send them an invitation or email. You must complete this task separately; see *Invite/Notify Volunteers*.

- Select Projects from main screen
- Scroll to Project and select Needs

- Scroll to Project Positions
- Select ASSIGN to the corresponding position you wish to assign a volunteer to

Name	Staffed	Required	Assigned	
Camp Director	Fully	1	1	Assign Edit
Health Supervisor	Fully	1	1	Assign Edit

- Select CHOOSE volunteers



- Search for Volunteer and put an X in the box next to their name
- Select CHOOSE (bottom right of screen)
- Select ASSIGN CHOSEN VOLUNTEER to add

If volunteer is not currently listed within the Contact Database, you will have to exit and create a contact profile before you can assign a volunteer to the Project/Camp.

Complete steps above for each volunteer. Refer to *Invite Project Volunteer* section to invite/notify volunteer of assignment.

Invite Project Volunteer

Once your project needs are set, and positions have been assigned, you may invite volunteers to register under your project. This invitation should include instructions on the proper onboarding position to register. Otherwise, once the project is published, members of the public seeking a volunteer opportunity may also apply.

Do not use the *Project Needs* function to send an email to a volunteer, it will not show up in the volunteer email box.

You may send notice to the volunteer using either the EMAIL or VM INVITATION process below. It is recommended to send an invite through UWGB Outlook instead of Volunteer Matters invitation process. The invitation process takes additional time. You may consider skipping the invitation step if the volunteer has already been notified through the Camp Office Staff Letter that includes a link and instructions to the VolunteerMatters site.

Email

1. Open up Project
2. Select Project Needs
3. Select Project Position
4. Select ASSIGN of a specific position

Dates	Name	Staffed	Required	Assigned	
Apr 30, 2024 - Dec 31, 2024	Camp Director	Minimally	1 - 10	4	Assign
Apr 30, 2024 - Dec 31, 2024	Health Supervisor	Minimally	1 - 10	3	Assign
Apr 30, 2024 - Dec 31, 2024	Staff Volunteer	Minimally	1 - 10	2	Assign
May 20, 2024 - Dec 31, 2024	Residential Hall Volunteer	Minimally	1 - 40	18	Assign

5. Select Excel and download
6. Copy the volunteers emails into Outlook Email
7. Send the following message

   Thank you for volunteering for youth activities at UWGB. UGWB uses the VolunteerMatters platform to ensure our volunteers complete the required youth protection training. Here is a list of trainings that might be assigned to you based on your position or involvement with the youth activity. When you login to Volunteer Matters, please know that you may be assigned some or all of the following trainings:

   - Youth Agreement
   - Operations Manual
   - Criminal Background Check
   - Youth Protection Video
   - Mandated Report Video
   - Preventing Sexual Harassment and Violence Video

   You must complete the training and screening BEFORE your event or camp, otherwise you CANNOT participate.

   1. Login to Update Your Assigned Profile within VolunteerMatters

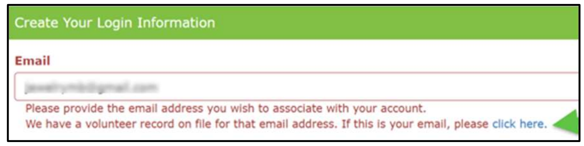
UWGB User	External UWGB Email User
▪ Select LOGIN for UW Employees and Students Login for UW Employees and Students Need an account? Register Now	▪ Select REGISTER NOW (at bottom) Login for UW Employees and Students Need an account? Register Now

- Use your assigned UWGB username/password

  Do not create a new profile or change your email without notifying maines@uwgb.edu

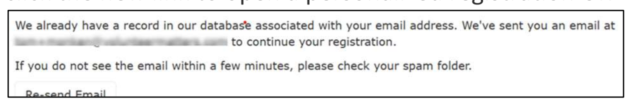
Once complete, your dashboard will reflect trainings assigned to you.

- Enter email and CLICK HERE

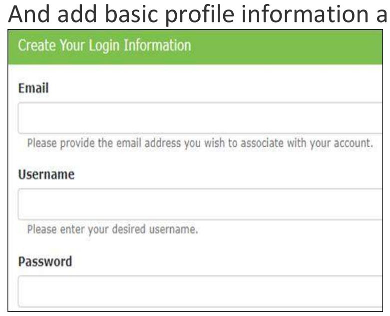


Use the email account that you received instructions from. Do not use a different email as this will create a NEW PROFILE and you will not see your assigned training.. If you use a different email account, notify maines@uwgb.edu as this will change your view.

- You will receive a message to return to your email and click the new link to open a personalized registration URL



- Create your username and password
  And add basic profile information and CONTINUE



Once complete, your dashboard will reflect trainings assigned to you.

2. Complete a Criminal Background Check
   If assigned a CBC, **you will receive an email from HireRite that you MUST accept to initiate the CBC**. You have 10 days to complete, otherwise you will be locked out of HireRite.

If you have any questions or need more information about the volunteer registration process, please don't hesitate to reach out to me at 920-465-2781 or maines@uwgb.edu.

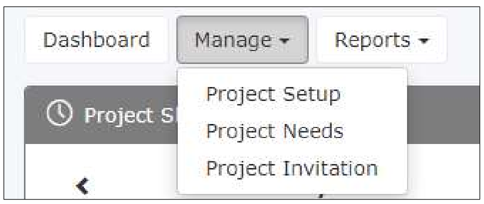
Once the volunteer opens the Volunteer Matters link and initiates the CBC Credential, a link will go to HireRite. HireRite will then send an invitation email link to the Volunteer. The volunteer MUST select this email link as well to start the CBC process.

VM Invitation

For documentation purposes, below is the VM invitation process within Volunteer Matters. We do not use this process and elect to send an email using outlook not the VM System.

1. Open Project Dashboard
   - Select Projects from main screen.
   - Scroll to Project and select Dashboard

2. Select Manage / Project Invitation



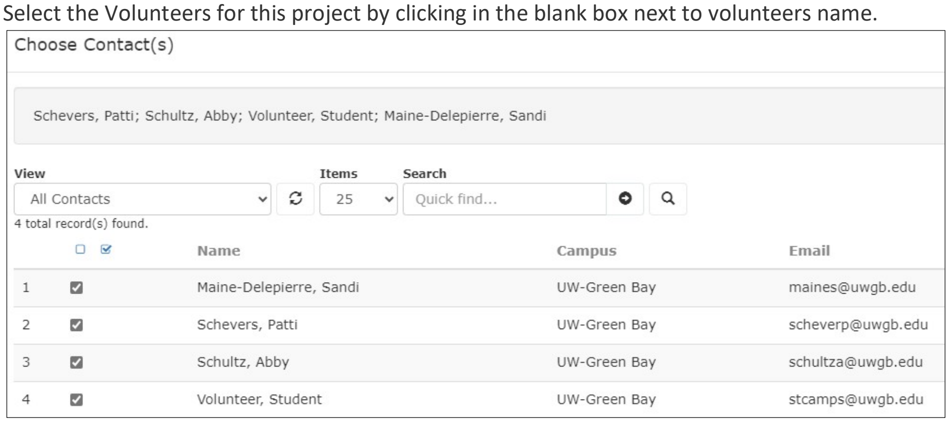
4. Complete Invite Volunteers email details that will go to recipients.

<table>
<tr>
<td>Choose Volunteers</td>
<td>

- Click on "Choose Volunteers" to open the [contact chooser] to select contacts already in the system. You can use the contact chooser to select any number of volunteers.

If a contact is not listed, you may add invite them as *Additional Email Recipients*. Otherwise, go to **Contacts** and set up the volunteer before completing this section.

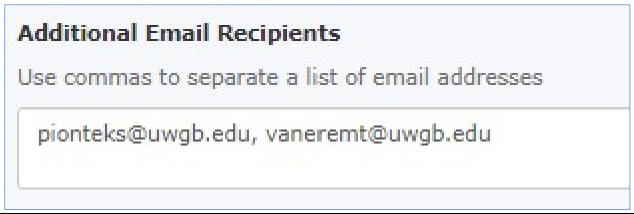
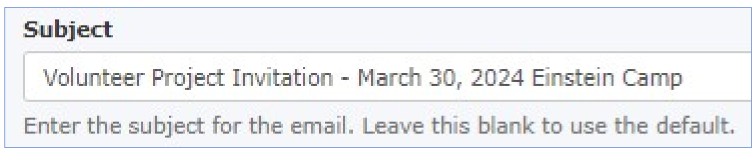
- Select the Volunteers for this project by clicking in the blank box next to volunteers name.



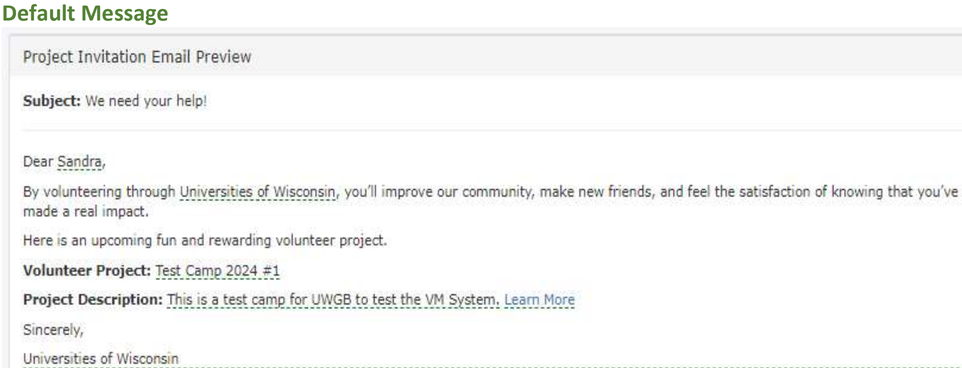
If you "check all" or "clear all" while in the chooser, it will only act on the records viewable in the list, not on all of the records that may have resulted from a search. For example, if your "Items" were set to 25, it would act on the 25 records displayed. If "Items" were set to 500, it would act on the 500 records displayed. The "Items" setting is at the top-middle of the chooser.

- Then click the "Choose" button to return to the Project Invitation page where they will be added to the "Volunteer Recipients" list.

</td>
</tr>
</table>

<table>
<tr><td></td><td>
</td></tr>
<tr><td>Additional Email Recipients</td><td>Contacts not in the system. Add emails of individuals not in the contact database. Enter a list of comma-separated email addresses for any potential volunteers not already in your VolunteerMatters system.

</td></tr>
<tr><td>Subject</td><td>You can use the default line of “We need your help!”. Otherwise, create a specific subject line that includes the camp date. The Camp Name and Date is important for the volunteer to know the camp and date information.


This will update the "Project Invitation Email Preview" on the right with your custom subject.</td></tr>
<tr><td>Special Invitation Message</td><td>You can use the default Project Invitation message or craft one of your own. Any Special Invitation Message is ADDED to the Default Message. Otherwise the default messaging will appear when you hit SEND.

Default Message


Special Invitation Message

Thank you for volunteering for the Einstein Project Camp this summer. UGWB uses the VolunteerMatters platform to ensure our volunteers complete the required youth protection training.

We would ask that you visit the project page link below to update your profile in the system and complete the required training that is assigned to you.

Click the "Login" button on the Volunteer Sign-Up page and then the “Login via UW Net ID” button to login and then complete the required onboarding credentials for your instructed volunteer role.

Criminal Background Check: You will receive an additional email from HireRite that you MUST accept to initiate the CBC that may be assigned to you.

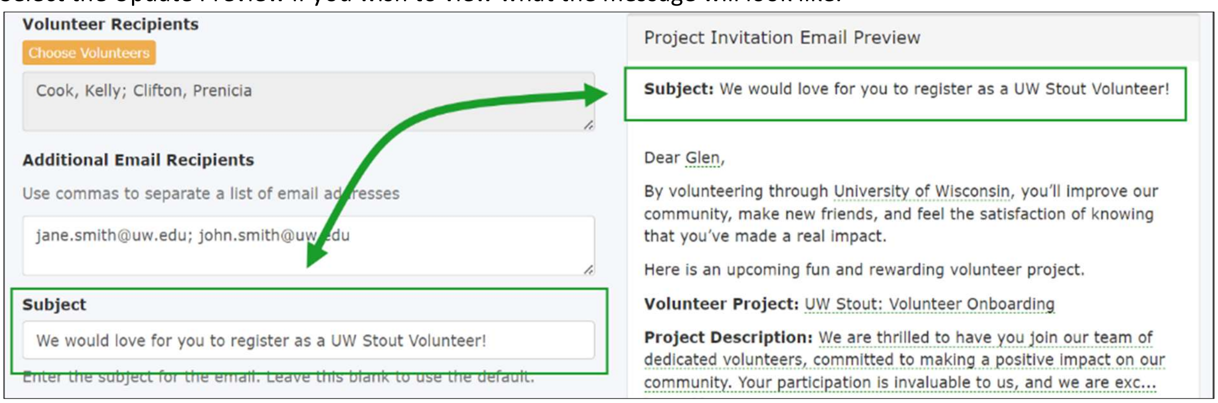
Deadline: May 31</td></tr>
</table>

	If you have any questions or need more information about the volunteer registration process, please don't hesitate to reach out to us at (CONTACT EMAIL) or (CONTACT PHONE NUMBER). Your involvement and commitment are highly appreciated, and we look forward to working with you.

5. Check Box to *Send Me Email Results*
   Click the box to send yourself the email results. Unselect the box if you do not wish to view the results. It is checked by default so it is only necessary to worry about if you do **not** want the results.

   The email results will include those emails that were queued for delivery along with those who we were unable to send the invitation to.

6. Update Preview
   Select the Update Preview if you wish to view what the message will look like.



7. Select UPDATE PREVIEW to include any Special Invitation to the Default Message
8. Select Send
   Click on SEND once your message is complete and you are satisfied with the results.

Refer to next section to Create a Special Message Template

Duplicate Volunteer Profiles

For staff/volunteers who do not follow the given instructions and create a new profile with a different email than what you have listed, this causes an issue in that they cannot view their assigned tasks. This is because the tasks were assigned to the original contact profile.

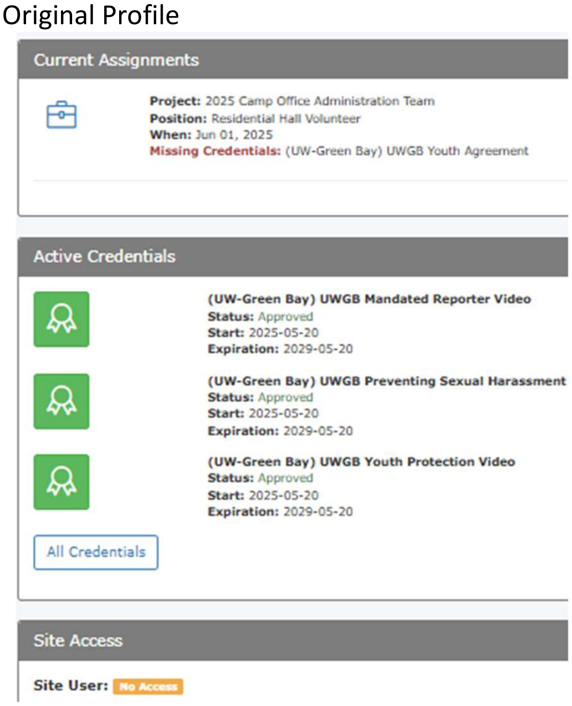
Usually, the profile with "No Access" is the account that should be deleted. See screens shot below. Next steps are as follows:

Using Original Contact Profile	Using New Contact Profile (new email)
▪ Delete the second duplicate profile created by the volunteer staff	▪ Unassign the original contact profile from the Project ▪ Delete the original contact profile ▪ Assign the new profile to the Project ▪ You may need to add credentials to the new profile – or ask Volunteer Matters to move them over for you ▪ Notify the volunteer their link is ready to complete the assigned tasks

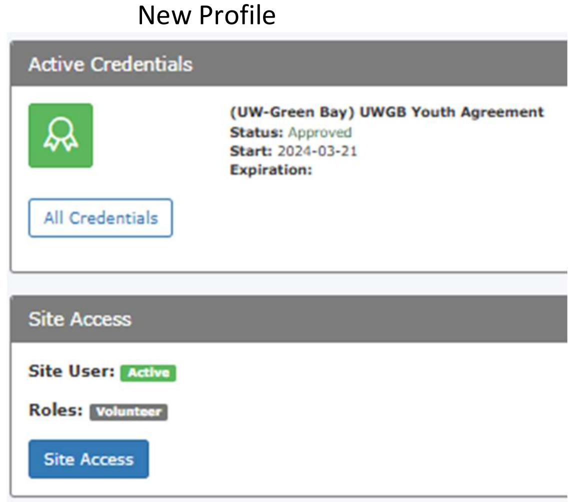
If a volunteer decides to create a new profile and the old profile has existing volunteer history and completed credentials, we will have to UPDATE the old profile with the new email and delete the new profile. You cannot move credentials and volunteer history to a new profile.

	Status	Status Date	Name	Email
1	Active	2025-05-21	Fowler, Calista	fowlerc@uwgb.edu
2	Active	2024-03-21	Fowler, Calista	fowlerc@uwgb.edu

Original Profile



New Profile



Monitor Volunteer Assignment Status

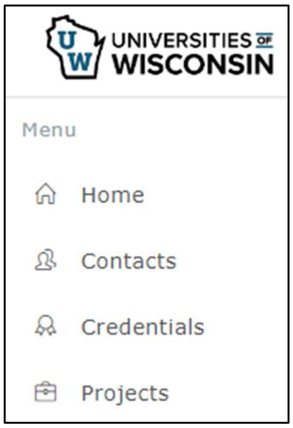
Once project is set up and volunteer invitations sent, the Program Director will need to manage the volunteer credential assignments – or their assigned screening and training process to ensure the volunteer has completed all the requirements prior to a covered activity date.

View Credentials Dashboard Contents

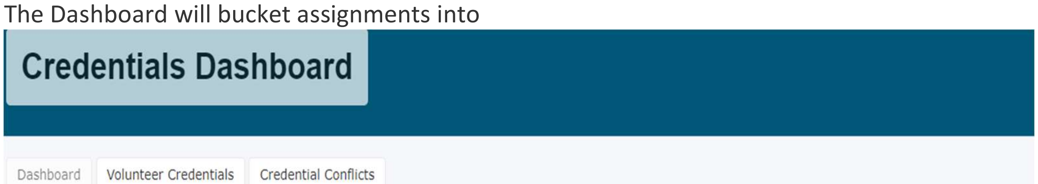
The Dashboard will inform you of the number of volunteers within a status, such as Review, which requires action on the part of the Program Facilitator.

Refer also to [Understanding Credential Statuses PDF] or the [Credential Conflicts List PDF] for additional information.

- From Home Page select Credentials to open the Dashboard (left side of screen)



- View Credentials Dashboard
  The Dashboard will bucket assignments into



Credential Status Change Counts (Past 30 Days)

	Incomplete	Submitted	Review	Approved	Exempt	Expired	Denied	Canceled
(UW-Green Bay) UWGB Youth Agreement	0	0	0	1	0	0	0	0
(UW-Madison) WPR Outreach Volunteer Corps Position Description	0	0	0	3	0	0	0	0
(UW-Madison) WPR Volunteer Agreement Letter	0	0	0	3	0	0	0	0
Volunteer Agreement	0	0	0	1	0	0	0	0
Criminal Background Check	0	2	0	2	5	1	0	0
(UW-Green Bay) UWGB Volunteer Agreement	0	0	0	14	0	0	0	0
Mandated Reporter Training	1	0	0	0	0	0	0	0
Preventing Sexual Harassment and Violence Training	1	0	0	0	0	0	0	0
Youth Protection Training	1	0	0	0	0	0	0	0
UW-Extension Driver Authorization	0	0	0	1	0	0	0	0

Most credentials should have an APPROVED status not EXEMPT. An Exempt status appears whenever Admin makes changes to a credential. For example, a CBC is approved, unless Admin reviews and makes a change, then the status is changed to Exempt.

Update Review Action Statuses

From the Dashboard, the Review and Denied status are the most important and require action.

- Click on number under REVIEW to Open
- Select on each volunteer and review the status

Credential Status Change Counts (Past 30 Days)

	Incomplete	Submitted	Review	Approved	Exempt
(UW-Green Bay) UWGB Youth Agreement	0	19	0	5	0
(UW-Superior) Attestation	0	0	0	0	0
Volunteer Agreement	0	0	0	5	0
Criminal Background Check	0	2	1	16	10

- Change status as appropriate; see also *Change Credential Status* section

CPR Certifications: must be from American Red Cross or American Heart Association only.
Medication Management should have 5 attachments (unless volunteer included them together)

Supporting Documents

Timestamp	Original Filename
2024-02-29 20:19:51.0	Medication Topical 02292024.pdf
2024-02-29 20:19:51.0	Meidcation Eye 02292024.pdf
2024-02-29 20:19:51.0	Medication Ear 02292024.pdf
2024-02-29 20:19:51.0	Medicaton Oral 02292024.pdf
2024-02-29 20:19:51.0	Medication Principles 02292024.pdf

Dashboard Status Options

Credential Conflicts

Use to view all project volunteers.

- Click on Credential Conflicts at top of dashboard

Dashboard | Volunteer Credentials | Credential Conflicts

- Review screen or select EXCEL to export
- Filter from within excel and copy email into Outlook to send a reminder

Copy | Excel | CSV | Print | Email

Need Start	Need	Project	Campus	Assignee
2024-08-20	Camp Staff	Aug 20-23 Exploring Natural World of Oneida, 8:00-3:00 pm, 4th-6th Grade	UW-Green Bay	Baughman, Sarah
2024-08-20	Camp Staff	Aug 20-23 Exploring Natural World of Oneida, 8:00-3:00 pm, 4th-6th Grade	UW-Green Bay	Baughman, Sarah

Credential Status Counts

Use to view a specific credential conflicts, such as CPR CERTIFICATIONS.

- Click on highlighted number for each status. Example below CPR CERTIFICATIONS

	Incomplete	Submitted	Review
(UW-Green Bay) UWGB Volunteer Agreement	0	0	0
(UW-Green Bay) UWGB Youth Agreement	0	0	0
(UW-Green Bay) UWGB Youth Volunteer Agreement-Minor Staff	0	0	0
(UW-Superior) Attestation	0	0	0
Volunteer Agreement	0	0	0
Criminal Background Check	0	9	2

- Select EXCEL to import, use filters and obtain emails for Outlook reminders

Copy Excel CSV Print Email

Contact	Age	Credential Name	Status	Status Timestamp
Betancur, Sam	36	(UW-Green Bay) CPR Certification	Incomplete	2024-04-10 20:35:53.0

Project (Camp) Credential Status

Use when Program Facilitator wants to see their camp volunteers only. You can also use Credential Conflicts (above), export to excel and filter on a specific camp.

- Select Projects from main menu at left
- Search on Projects
- Click on Project Name to open
- Select Credential Conflicts from right of Dashboard

Credential Conflicts

Need Type	Need
Position	Limited Volunteer
Position	Camp Volunteer
Position	Health Supervisor

Credential Conflicts

- Select Credential Conflicts (will only pull up the specific project conflicts)
- Select EXCEL to import, use filters and obtain emails for Outlook reminders

Copy Excel CSV Print Email

Need Type	Need	Need Start	Assignee
Position	Limited Volunteer	2024-06-15 12:00 AM	McAnally, Bethany

Submit Reminder Notifications

Reminder notifications should be sent routinely (weekly) to staff who have not finalized their screening or training. Any staff or volunteers not finalized the day prior to a camp program will be further notified they are not allowed to participate.

- Select Credentials Conflicts
- Select Excel

Dashboard | Volunteer Credentials | Credential Conflicts

Show 10 entries Search:

Copy Excel CSV Print Email

- Open download report (upper right corner)
- Sort by Camp and Staff Last Name
- Email volunteers by Camp and cc Camp Director

In the event staff/volunteer have NOT completed screening and training prior to first day of camp program, someone must escort staff off the premises. They may return upon completion of all assigned credentials.

Understand Status Descriptions

You will need to have a clear understanding of credential status before you review any credential status or conflicts.

Status	Description	Additional Actions Needed
Approved	Some credentials are set up to be automatically approved upon completion, i.e. electronically signed agreements like the Volunteer Agreement.	Volunteer can proceed with any activity. May automatically change from this status if there is an expiration policy.
Cancelled	An administrator outside service marked the credential canceled manually.	Occasionally when an integrated credential is run**,** there can be an error where the credential results in a "Review" status. The credential details typically will have the reason for failure. Most of the time the credential process simply needs to be run again. After editing the credential status, the precollege liaison will either contact the volunteer or have the program organizer contact the volunteer to to explain the problem with their previous submission and what they must submit to correct the application. Upon login to the portal (https://uw.volunteermatters.org), the volunteer will be prompted to start the canceled credential application again.
Denied	A Credential Administrator or an integrated 3rd party provider has explicitly denied the application for this credential. This excludes the volunteer from participating in any volunteer opportunity that requires this credential	Contact the Program Organizer assigned to this project and have them remove the volunteer from the assignment and notify the volunteer of their ineligibility. The Administrator and/or Program Organizer should have immediately removed the assignment and contacted the volunteer to notify them of their ineligibility.
Exempt	The credential is automatically exempted for the volunteer when they fall below the "Age Exemption Limit" setting on the credential. This is similar to being approved and the volunteer can proceed with the project assignment without issue. The volunteer was not approved but instead is exempt from the requirement. Exemptions due to the age of the applicant may be assigned automatically by the system (i.e., a volunteer was exempted by the system because they were too young or too old) and exemptions may be made manually by UW Shared Services with regards to a background check, etc..	All changes to an exempt status should be accompanied by notes explaining the reason for the exemption as well as a history record showing when and who made the change. Review notes to assure policies for exemptions have been followed Note: When the CBC process is halted e.g. due to a prior CBC completion or duplicate being found in HireRight, the options to change the status in Volunteer Matters from Review are - Cancelled or Exempt. You cannot update this to Approved, even though the majority of CBC Credentials are Approved.
Expired	The credential was either automatically expired by rule or by manually by an administrator.	The volunteer will need to re-complete the credential once they are assigned the credential again for a new covered activity.
Incomplete	Something additional is required of the volunteer. This status indicates you are waiting update from the volunteer - whether they have not completed the integrated background check or training, or have yet to upload a needed file, or the organization reviewed and decided the application was incomplete or incorrect and kicked it back to the volunteer.	When editing the credential status, set the "Waiting for File Upload" setting to True. Also enter notes describing the reason for the incompletion. Contact the volunteer to explain the problem with their previous submission or have the program organizer follow up with the volunteer and explain what they must submit to correct the application. Upon login to the portal (https://uw.volunteermatters.org), the credential banner will display on the volunteer dashboard/homepage and the volunteer can click on "Complete Application" to resolve incomplete credentials.
Missing	The volunteer has either never applied for the credential, their previous application was incomplete, or the credential has expired and the application must be repeated. The volunteer has either never applied for the credential, their previous application was incomplete, or the credential has expired and the application must be repeated.	The volunteer should be instructed to login to the system and sign the credential and complete any action needed. If these appear to have been stalled (were changed to this status or assigned to the need more than a week ago) or the assignment date is very near, contact the Program Organizer for insight and recommend they contact the volunteer and ask them to log into the portal to resolve the conflict. Upon login, the volunteer will be presented with all credential conflicts for future assignments.
Review	Waiting on the organization's review to decide approval.	Project Director will need to open the credential and either approve it or contact volunteer.
Submitted	Status indicating a credential that integrates with a 3rd-party – the system passed the request along to them and is waiting to hear back – OR – a native credential where some type of action must be taken by the Administrator. Example: CBC submitted to HireRite.	Someone from the 3rd party system must review the request prior to VolunteerMatters changing the status. Typically, a credential should not remain in either status for more than 72hrs. If it does, especially for background checks requiring review, you may need to contact the UW Shared Services for this credential for further assistance. It likely means US Shared Services has yet to review and adjudicate the credential.

Change Credential Status

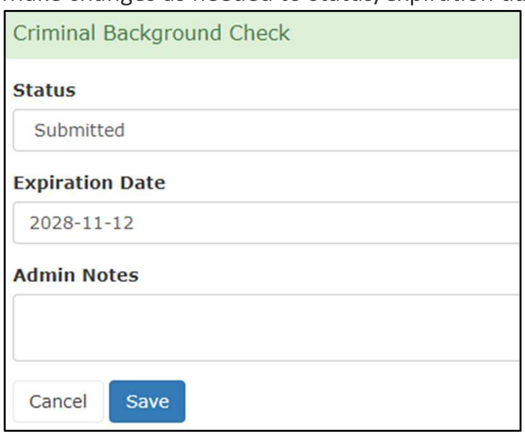
During the course of a program, credential status may need to be updated based upon

- Volunteer submitting file to be reviewed
- Credential submitted in PDF form

Change/Update Credential Status

Approve those credentials where review is required, ie. CPR Certificate or Volunteer Agreement)

- Click on volunteer name to open the volunteer contact profile
- Click on Credential to Edit (right side of screen)
- Select EDIT on credential for volunteer name (bottom of screen)
- Make changes as needed to status/expiration dates (e.g. to Approved) and Save



- Include a note as to why it was Approved

Add Attachment to Credential

Attach a file and/or approve those credentials requiring review, i.e. Volunteer Agreement.

- Temporarily save PDF file
- Click on volunteer name to open the volunteer contact profile
- Click on Credential to Edit (right side of screen)
- Select EDIT on credential for volunteer name (bottom of screen)
- Select Choose Files to upload PDF file
- Change Start Date if needed (to actual certification date) and Save

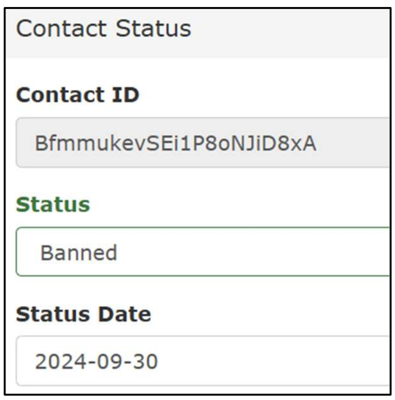
CPR Certification	Must be from American Red Cross or American Heart Association only.
Medication Management	Should have 5 attachments (unless volunteer included them together)

Non-Compliant Status

For volunteers who do not complete the required assignments, Program Director or Administrator should change the volunteers credential to Non-Compliant.

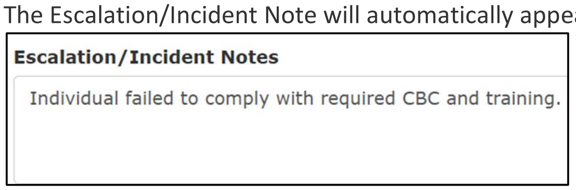
Once updated, the status can be changed back to Active Reinstated.

- Click on volunteer name to open the volunteer contact profile
- Click on Credential to Edit (right side of screen)
- Select EDIT on credential for volunteer name (bottom of screen)
- Change Status to: Banned
  This ensures the volunteer cannot be assigned to any other projects. This status can be changed once they comply.



- Add a Admin Note (or Status History Note). Status History will be viewable to Program Director; Admin Notes are viewable to only the Administrator.

  The Escalation/Incident Note will automatically appear whenever you select BANNED status.



- Save

Monitor Criminal Background Check

CBC Credentials are a little different in that

Criminal Background Checks: individuals who have completed and approved CBCs within HireRite will require a one-time completion of the additional HireRite sign-in to connect VM with HireRite. **Once the volunteer opens the Volunteer Matters link and initiates the CBC Credential, a link will go to HireRite. HireRite will then send an invitation email link to the Volunteer. The volunteer MUST select this email link as well to start the CBC process.**

The duration of a CBC for Day Camps and Residential Overnight Camps is different (2 years vs 4 years)

Shared Services Support Contact: **Angela Schultz, 608-262-0826**
Angela.schultz@uwss.wisconson.edu

Volunteer CBC Process

Upon completion/updating their contact profile, the Volunteer will see on their dashboard what is required to complete. One of those items may be the CBC.

- Volunteer will click on the CBC which will initiate a HireRite email to them.
- Volunteer will need to open their email to click on the HireRite link to take them to HireRite
- Once in HireRite they will enter their DOB to start the HireRite process
- Volunteers who do not accept the HireRite invitation, the HireRite request will need to be resent from within HireRite by the Administrator.
- Volunteers will receive automated **daily** reminders from HireRight
- HireRight will STOP the invitation after finding a duplicate invite and return duplicate notification to VM
- UW Shared Services will review the Credential Conflict on the VM dashboard, confirm CBC completion date and no prior convictions, and then update volunteer status to exempt.

Minors Requiring a CBC

There may be some minors that require a CBC as they are staff and will be supervising minor participants. The minor staff MUST be at least 2 years older than those they are supervising.

Although the CBC will return as "nothing found" it is still required.

Process is the same as above, with the exception of upon entry of a birthdate in HireRight the system will produce a field for entry of parental email if the applicant is not at the age of consent.

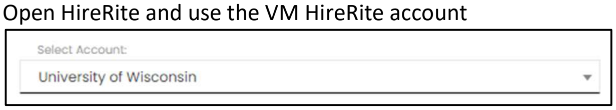
The volunteer will enter the parent email and the parent will be prompted to view and sign the consent form, which will then be uploaded into the HireRight system and the check will proceed.

After uploading the parental consent form will be available in the documents section of the work order in HireRight.

Resend CBC Invitation from HireRite

If credentialing conflict denotes Incomplete and it is over 21 days you will need to resend the invitation. You must have HireRite access to do so.

- Open HireRite and use the VM HireRite account



- Search on individual name
- Right click on the existing order to RESEND THE INVITATION
  After the second invitation sent, the volunteer has 5 days to respond.

Create New Order in HireRite

In the event of a duplicate order, the initial order may be cancelled. E.g. HR completes an I-9 request for the same volunteer, it will duplicate the initial CBC order, thereby cancelling it. In the Credentialing Status, it will come up under REVIEW STATUS as a duplicate.

1. From within VolunteerMatters, cancel the initial CBC credential for that volunteer.
2. Open HireRite
2. Select NEW ORDER and complete a new order process to resend to volunteer
   The volunteer has 21 days to respond.

Change CBC Expiration Date

Once complete, you will need to verify the CBC date. HireRite automatically is set for 4 years. If you know the volunteer is serving at an overnight camp, you will have to manually change the CBC expiration date for a 2 year mark.

Complete this step for Status: COMPLETED, DENIED, CANCELLED

Contact Angela Schultz for assistance with HireRite issues, such as changing to "*exempt*" status for someone who has a confirmed CBC in HireRite and sends the request back to VolunteerMatters as *failed delivery*.

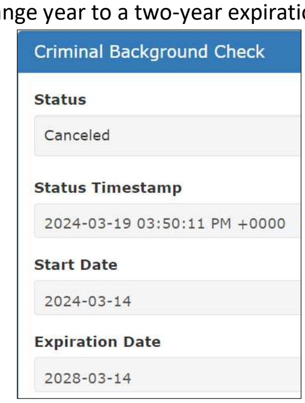
CBCs that Meet Company Standards
If the CBC comes back as "meeting company standards," update the credential status from "Canceled" to "Exempt" and adjust the expiration date per the date when the CBC was approved. Add explanatory note in the "Admin Notes" field. Save the updates.

If the CBC comes back as "meeting company standards," update the credential status from "Canceled" to "Exempt" and adjust the expiration date per the date when the CBC was approved. Add explanatory note in the "Admin Notes" field. Save the updates.

Does Not Meet Company Standards
Refer to *CBC Findings Review* section.

1. Open *Contacts*
2. Scroll to specific volunteer
3. Click on their name to open their profile
4. Scroll to *Credentials* section (bottom right)
5. Click on *Criminal Background Check* Credential box to open

6. Select EDIT
7. Click in Expiration Date field
8. Change year to a two-year expiration (default is 4)



CBC Negative Findings Review

CBCs that have been reviewed and do not meet University standards will have their status changed to CANCELLED. CBCs are monitored by Shared Services who will coordinate with the Pre-College Liaison when any negative results are reported.

- Shared Services will monitor the CBC results from Hire Rite
- Status will be changed to REVIEW and send report to Administrator
- Administrator will review against campus HR standards
- Administrator will reply to Shared Services email whether campus will approve the findings

<table>
<tr><th>Meets Standards</th><th>Does not Meet Standards</th></tr>
<tr><td>

- Shared Services will change HireRite status to MEETS STANDARDS
- Administrator will change Volunteer Matters status to EXEMPT
- Administrator will update expiration date (based on 2 or 4 years)

1. Open *Contacts*
2. Scroll to specific volunteer
3. Click on their name to open their profile
4. Scroll to *Credentials* section (bottom right)
5. Click on *Criminal Background Check* Credential box to open

6. Select EDIT
7. Change status to EXEMPT
8. Change Expiration Date
   Default is 4; change to 2 if an overnight camp volunteer

</td><td>

- Shared Services will change Volunteer Matters profile credential status to CANCELLED
- Shared Services will change HireRite status to DOES NOT MEET STANDARDS or MEETS STANDARDS based on campus decision

- HireRite Adjudication Process will initiate
  This process follows the standard HR process for CBCs. If volunteer did not disclose findings, it will be an automatic DOES NOT MEET STANDARDS.
  - HireRite generates letter to volunteer
  - Volunteer may dispute the information on the report to HireRite (it is not a University decision)
  - Volunteer will receive second in 5 days if they do not respond to the initial letter from HireRite

Finalize Volunteer Matters status

- Remove expiration date from volunteer profile
- Add Admin Notes description as to why
- Change CBC status to BANNED

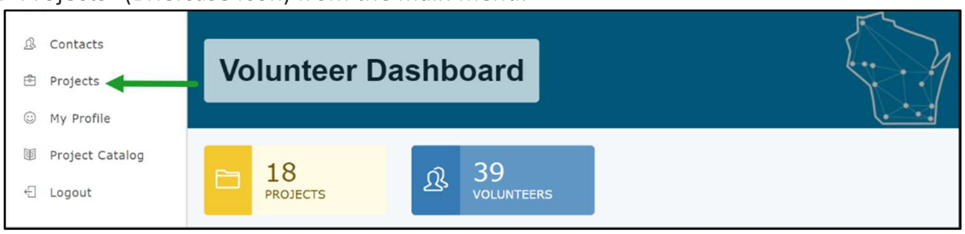
</td></tr>
</table>

Navigate the System

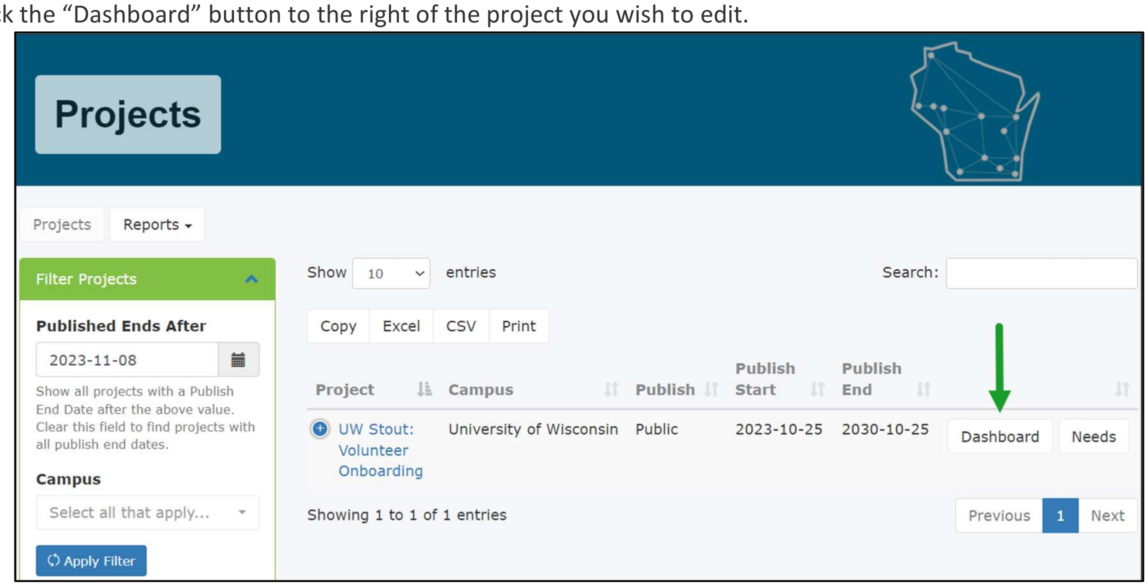
Change Project Set Up

If you need to update your project setup once you have been assigned and are logged in, follow the [Project Set Up PDF]() or the instructions below.

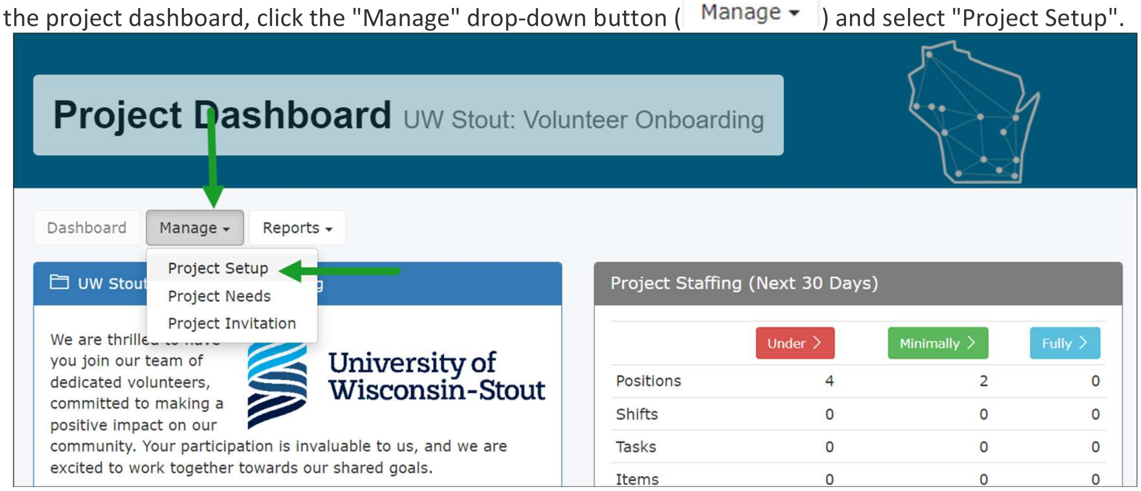
1. Click "Projects" (Briefcase Icon) from the main menu.

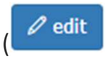


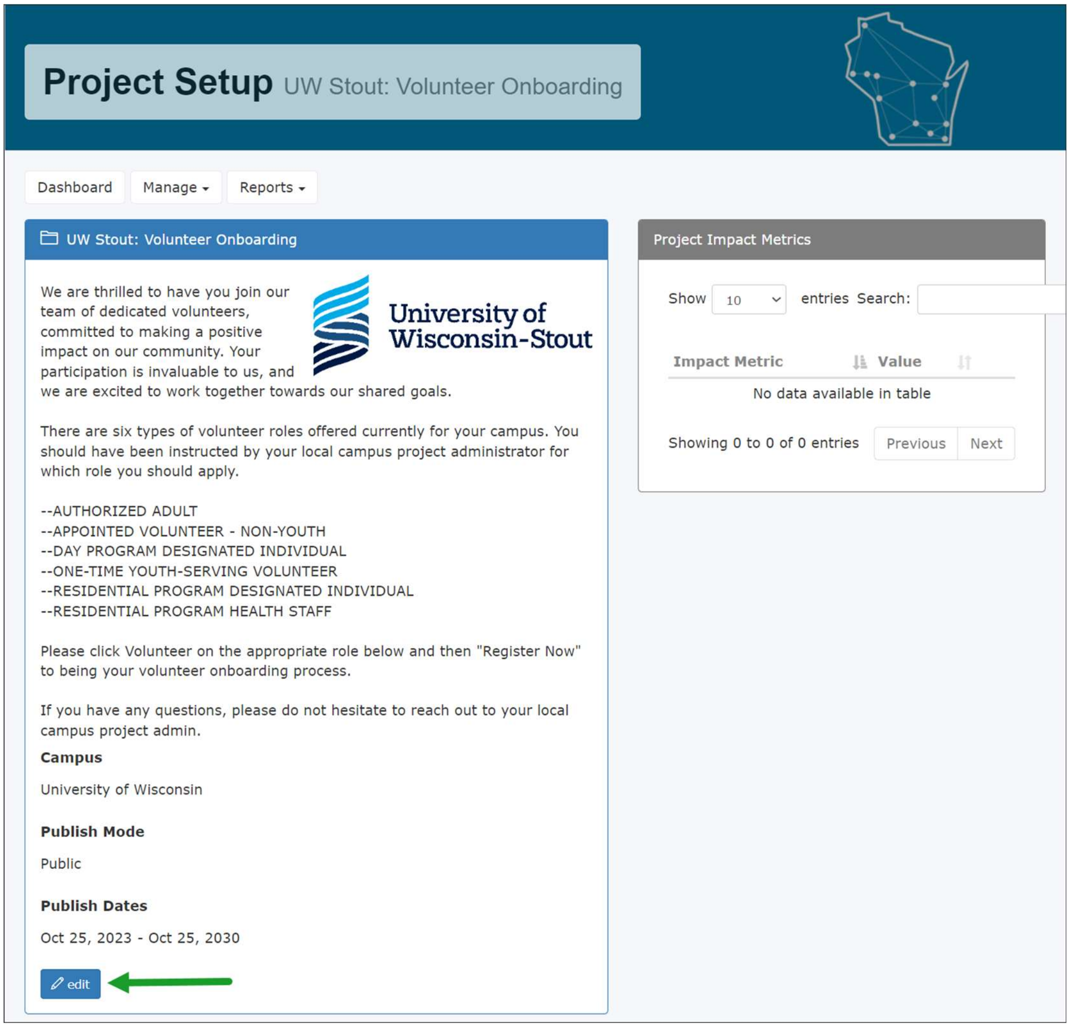
2. Click the "Dashboard" button to the right of the project you wish to edit.



3. On the project dashboard, click the "Manage" drop-down button (Manage ▾) and select "Project Setup".



4. Click the "Edit" button (
) under the project summary panel.



Note: you can view the Project Catalog from this screen as well.

5. Edit the Project

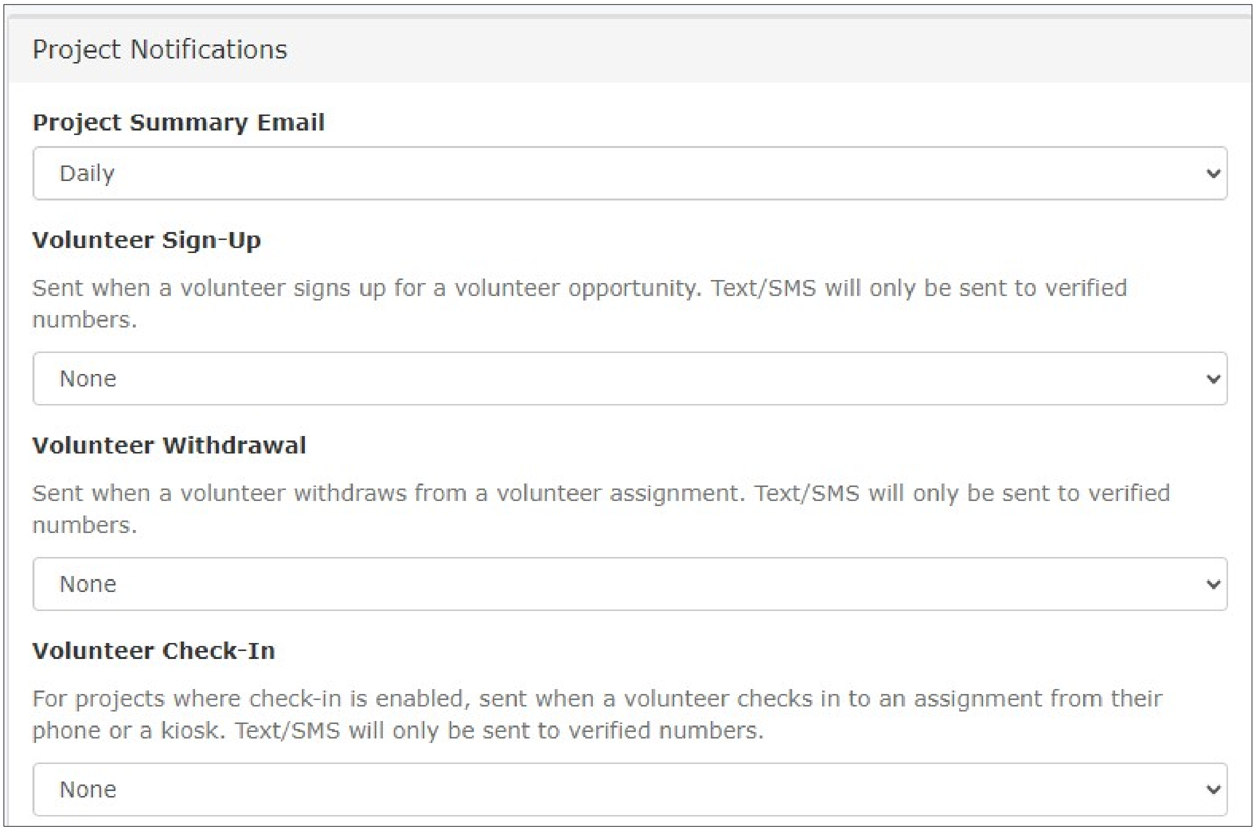
Once there you can edit much of the project's core settings and information. Including the project's identification settings (Name, Description, Dates, Images, etc.), extended information (address, cancellation policy, contact info, etc,), individual project settings (volunteer comments, feedback, etc.), and Need Types displayed administratively.

Consult with your Precollege Liaison if you have any questions on what you should or shouldn't modify.

Edit details as needed. It is suggested to confirm the Email listed is the correct name for your campus.

Project Notifications

Your project notifications will become important as you assign volunteers and manage them. The notifications determine how often you will receive automatic updates and notices when volunteers sign up – or withdraw - from your project.



Project Notifications

Project Summary Email

Daily

Volunteer Sign-Up

Sent when a volunteer signs up for a volunteer opportunity. Text/SMS will only be sent to verified numbers.

None

Volunteer Withdrawal

Sent when a volunteer withdraws from a volunteer assignment. Text/SMS will only be sent to verified numbers.

None

Volunteer Check-In

For projects where check-in is enabled, sent when a volunteer checks in to an assignment from their phone or a kiosk. Text/SMS will only be sent to verified numbers.

None

Reporting Tools

There are various project reports available to provide information on your project assignments, need configurations, onboarding compliance, etc.. It is the Project Organizer's role to manage the project, including volunteer credentials.

An organizer must be assigned to a project to be able to manage it. If you do not see your project, please contact your precollege liaison.

Click here for more information on VolunteerMatters reports. The most vital reports for you as a Program Organizer are the Assignment Roster and the Credential Conflict reports. For purposes of this SOP, only the Assignment Roster Report instructions are listed in detail within this section.

- My Volunteer History Report
- Assignment Roster Report - Across Multiple Projects
- Assignment Roster Report - Per Project
- Volunteer History Report - Across All Projects
- Volunteer History Report - Per Project
- Volunteer History Report - Per Contact
- Volunteer Hours Report - Across All Projects
- Volunteer Hours Report - Per Project
- Project Staffing Levels Report - Across All Projects
- Project Staffing Levels Report - Per Project

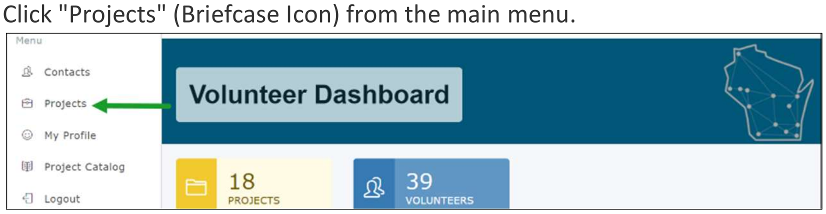
Assignment Roster Report

The Per Project Assignment Roster report allows an administrator or organizer to get a quick snapshot of current and upcoming assignments across a specific project.

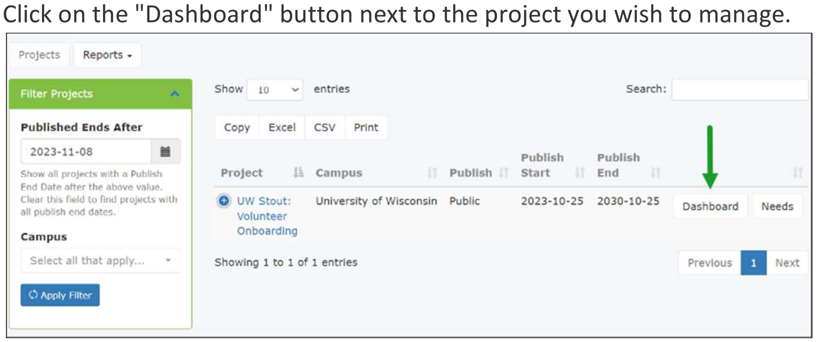
The report includes a number of fields pertinent to the assignment such as need name, credentials, age, etc..

This report also allows the ability to add additional contact information to be view-able onscreen as well as via export. If there is a contact field necessary for your report, please contact UW Shared Services for more information.

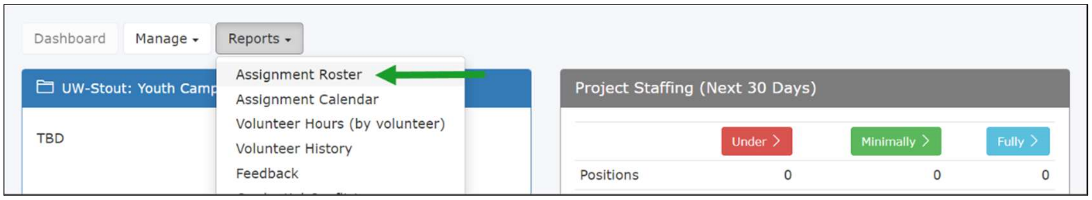
1. Click "Projects" (Briefcase Icon) from the main menu.



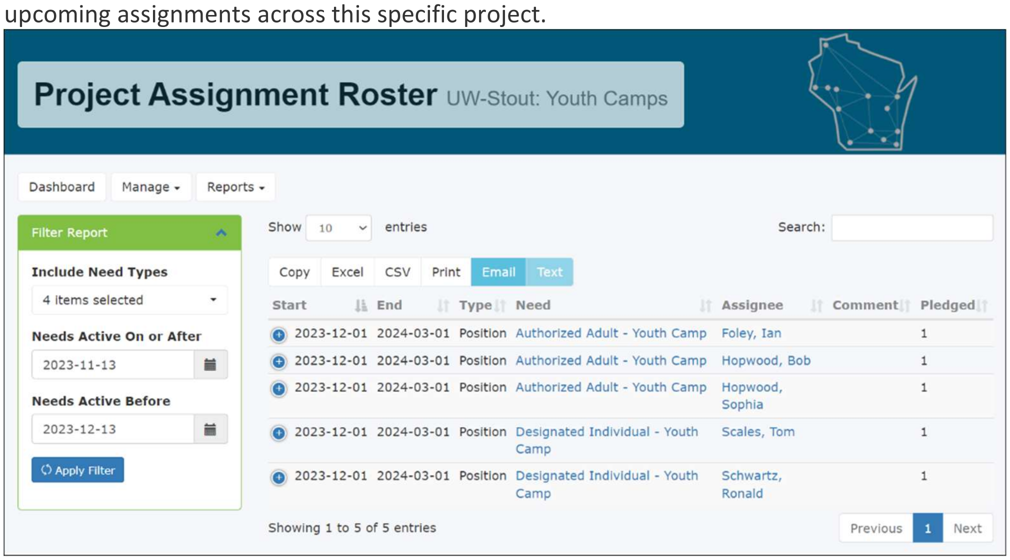
2. Click on the "Dashboard" button next to the project you wish to manage.



3. On the project dashboard, click the "Reports" drop-down button and select “Assignment Roster".

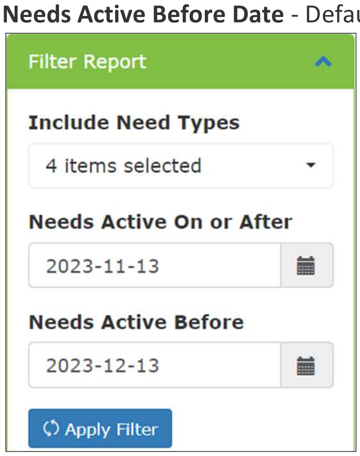


This opens the "Project Assignment Roster" page. Displayed onscreen is a tabular list of all current and upcoming assignments across this specific project.



It will display the main report fields along with any additional contact information configured by VolunteerMatters support for your organization. You can toggle the + sign to expand the information for each assignment.

4. Filter the Results
   To further drill down data, filter the onscreen results by matching any of the information on each assignment. Including credential names, assignee name, additional contact field, etc..
   - **Need Types** - Include Shifts, Positions, Tasks, and/or Items in the search.
   - **Needs Active On or After Date** - Defaults to today's date.
   - **Needs Active Before Date** - Defaults to one month from today's date.



The Program Organizer can either export this information or click-through the need name to manage the assignment or the contact name to access the contact record in question.

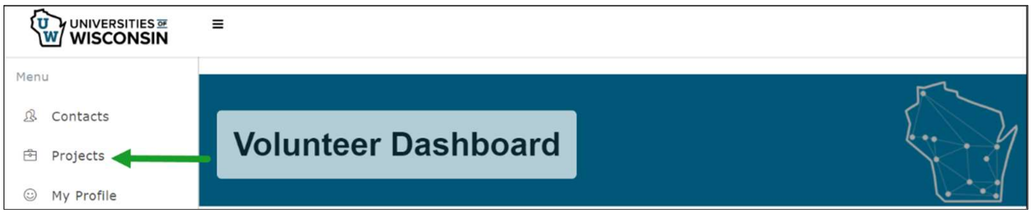
Credential Conflict Report

The report will give the Program Administrator a high level view on all assignees on the project where there is a credential conflict. Credential conflicts occur when a volunteer has yet to attain the credentials required for their upcoming assignment. See also *Campus Administrator – Manage Credentials* section.

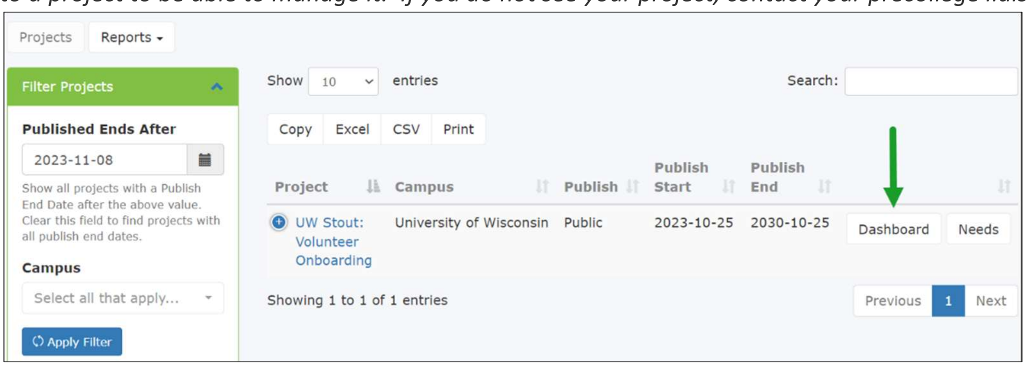
For assistance with understanding the Credential Conflict Reporting, see also https://support.volunteermatters.com/hc/en-us/articles/360011324053.

To run the report:

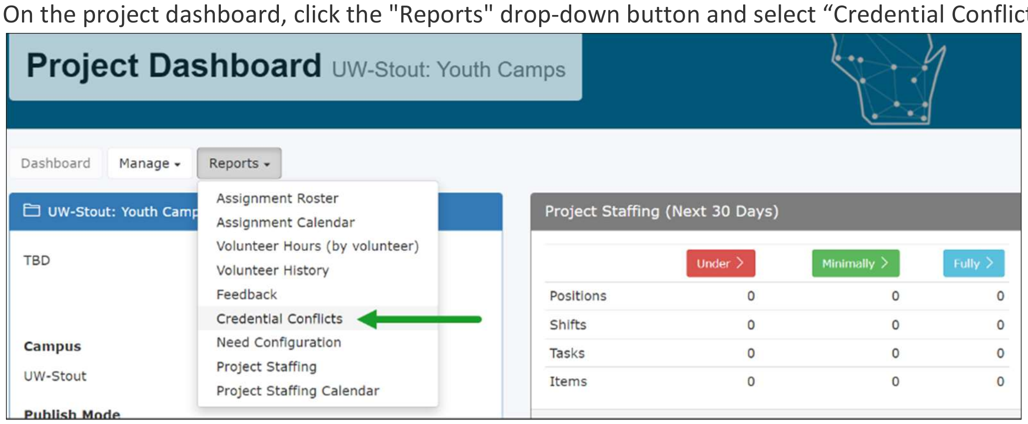
1. Click "Projects" (Briefcase Icon) from the main menu.



2. Click on the "Dashboard" button next to the project you wish to manage. *NOTE: An organizer must be assigned to a project to be able to manage it. If you do not see your project, contact your precollege liaison.*



3. On the project dashboard, click the "Reports" drop-down button and select "Credential Conflicts".



This opens the "Project Credential Conflicts" page.
This will open a tabular list of all credential conflicts for active and upcoming assignments.

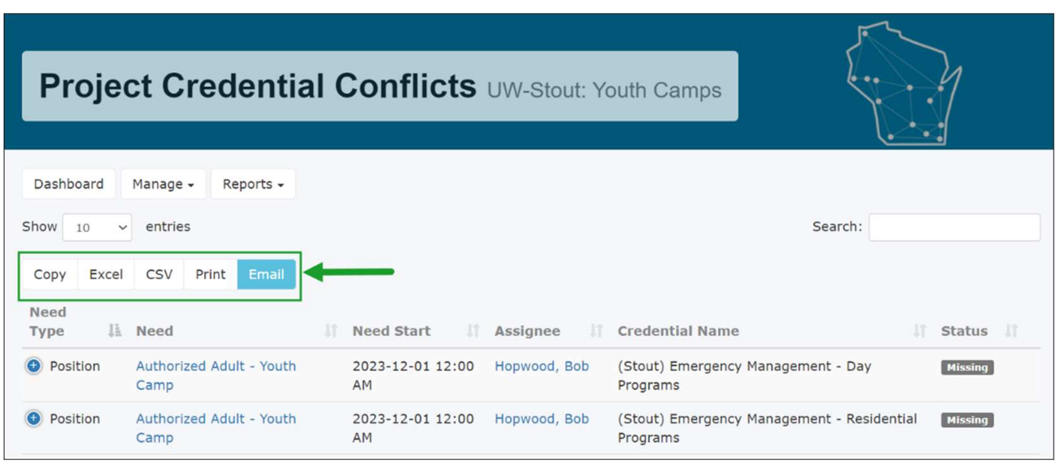
Need Type	Need	Need Start	Assignee	Credential Name	Status
Position	Authorized Adult - Youth Camp	2023-12-01 12:00 AM	Hopwood, Bob	(Stout) Emergency Management - Day Programs	Missing
Position	Authorized Adult - Youth Camp	2023-12-01 12:00 AM	Hopwood, Bob	(Stout) Emergency Management - Residential Programs	Missing
Position	Authorized Adult - Youth Camp	2023-12-01 12:00 AM	Hopwood, Bob	(Stout) Incident Reporting	Missing
Position	Authorized Adult - Youth	2023-12-01 12:00	Hopwood, Bob	Mandated Reporter Training	Incomplete

You can narrow the results by keyword (credential, credential status, etc.) via the search box. For example, I could enter a volunteer's name to narrow the results to an individual or enter a need name to narrow the results to only those who are assigned to a specific type of job.

You can also click through to the assignee's contact record or directly to the project need assignment page.

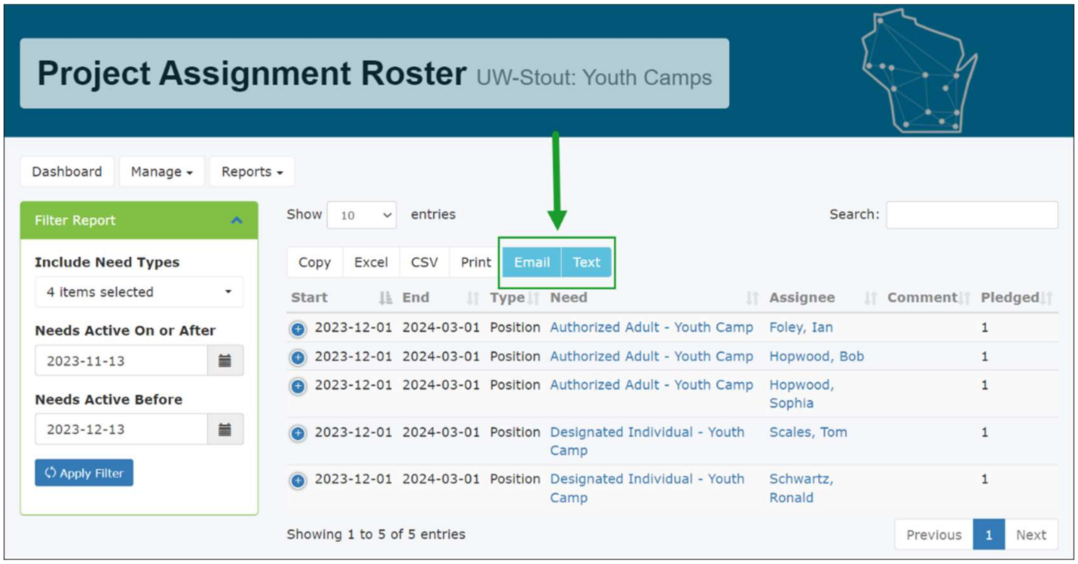
Default (Starting)	In-Progress	End
Approved: i.e., electronically signed agreements. **Submitted:** typically when integrated with a 3rd party - means the system passed it along to them and it is waiting to hear back – OR - a native credential where some type of action must be taken by the administrator. **Review:** means someone from the organization must review the application prior to giving it a new status.	**Review:** waiting on the organization's review to decide approval. **Incomplete:** waiting update from the volunteer - whether they have not completed the integrated background check or training, or have yet to upload a needed file, or the organization reviewed and decided the application was incomplete or incorrect and kicked it back to the volunteer. Only to be used for integrated Learning credentials, legacy integrated background check credentials, and/or those credentials requiring a file upload. **Missing**: The credential is not on the volunteer's contact record. The volunteer should be instructed to login to the system and sign the credential and complete any action needed.	**Approved:** Volunteer can proceed with any activity. May automatically change from this status if there is an expiration policy. **Denied:** After review by an administrator they declined the award of this credential. **Expired:** The credential was either automatically expired by rule or by manually by an administrator. **Exempt:** The credential is automatically exempted for the volunteer when they fall below the "Age Exemption Limit" setting on the credential. This is similar to being approved and the volunteer can proceed with the project assignment without issue. **Canceled:** An administrator outside service marked the credential canceled manually.

4. Export Results
   Just above the table you can choose to export the results into different file formats or email the volunteers in the list. This will be limited to the results displayed on-screen (considers keyword filters). These exports also include additional contact information for each assignee (email/phone).



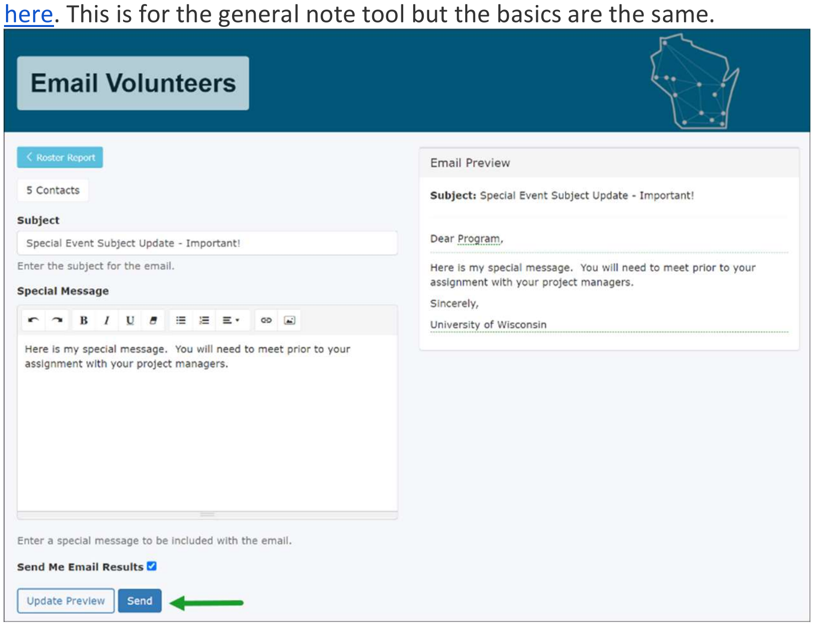
Send Email/Text Message from Per Project Assignment Roster Report

From the Per Project Assignment Roster report, a Program Organizer can contact the list of volunteers via email. The email template does not feature any assignment information and is fully customizable during the sending process. The text template allows up to 140 characters only and will only be sent to verified mobile numbers. You can filter the list via the filter options mentioned above. Once you are happy with the list, click the Email or Text buttons.



Email

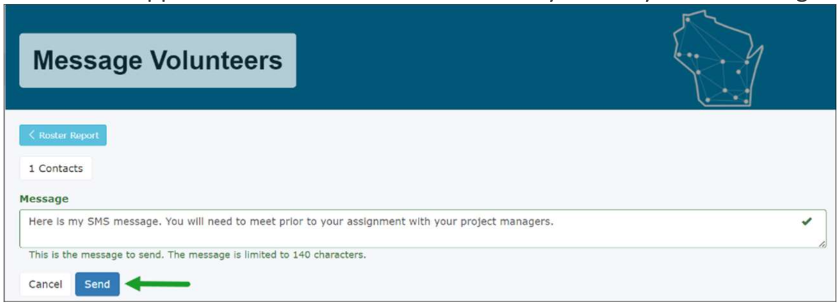
From there you can customize the subject and messaging and click Send. If a volunteer appears more than once in the list they will only be sent a single email. For more information on sending an email within the system please click here. This is for the general note tool but the basics are the same.



The email utility is limited to 500 volunteers per email. You may need to filter the list or use the search box to limit the results.

Text

From there you can message up to 140 characters. The system will not allow any characters past the original 140. If a volunteer appears more than once in the list they will only be sent a single text.



The text utility is limited to 500 volunteers per text. You may need to filter the list or use the search box to limit the results.

Reference: Advertise Your Program

When getting started with your VolunteerMatters system, the following links can be used to advertise your VolunteerMatters system from your website, email, marketing materials, etc.:

Login (for existing volunteers): https://uw.volunteermatters.org

Volunteer Registration (for new volunteers): https://uw.volunteermatters.org/register

Project Catalog (for all volunteers): https://uw.volunteermatters.org/project-catalog

Custom Project Page URLs (for all volunteers): Sometimes you may want to direct or advertise a specific pre-defined subset of projects and that's where the ability to create custom Project Catalog URLs comes in. Click here for more information.

Project Page URLs (for all volunteers): You can link directly to a specific project page via their project catalog URL from the project dashboard on the administrative side. This URL is beneficial for hidden projects, directing volunteers to a specific project, etc.

Reference: Contact Database Functions

Manage the Contact Database using the [VM Database PDF] or instructions below.

All Administrators and Project Organizers should have their *Contact Status* changed to Campus Staff. To do so, edit the Contact record and update the Status field.

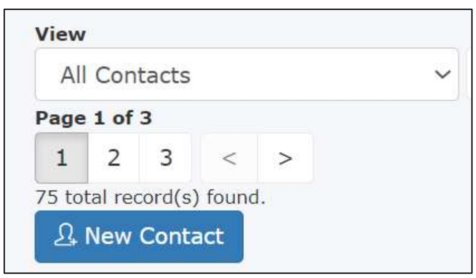
Manage Contact Profiles

All users may update their own profiles, however, as Administrator, you also have access rights to add, delete, or update user contact profiles.

1. Select Contacts from left menu

<table>
<tr><th>Add New Contact</th><th>Update Existing Contact</th></tr>
<tr><td>

a. Select New Contact



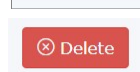
b. Add Minimum Details
To set up user contact profile; user may update their profile once they login.
Name: First and Last
Email
Campus (UW-Green Bay)
Status Date (will automatically enter today's date once you click in the box)

c. Save

</td><td>

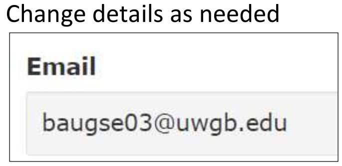
a. Click on existing user name

b. Scroll to bottom to select Edit



May also select Delete to remove user

c. Change details as needed



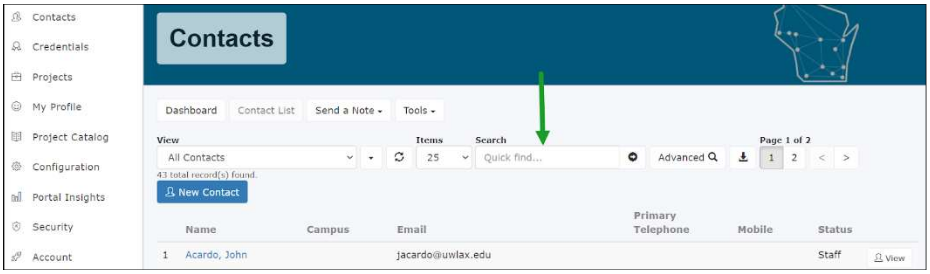
d. Save

</td></tr>
</table>

Using Contact Database

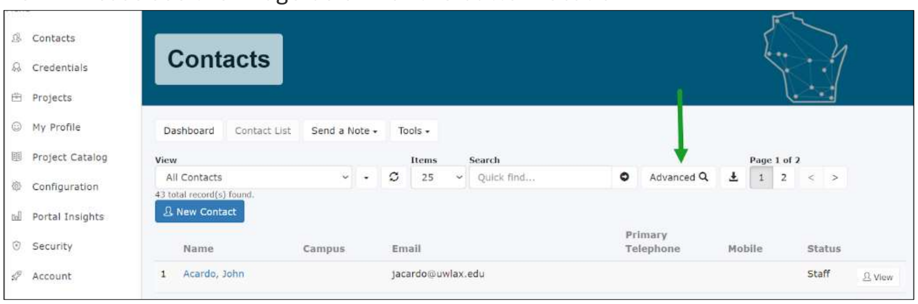
Quick Find

The "Search" field allows you to "Quick Find" contacts by entering any text into the box to search the default quick find fields. These fields include Name, Email, and Organization. Please see the image below for the Search button:

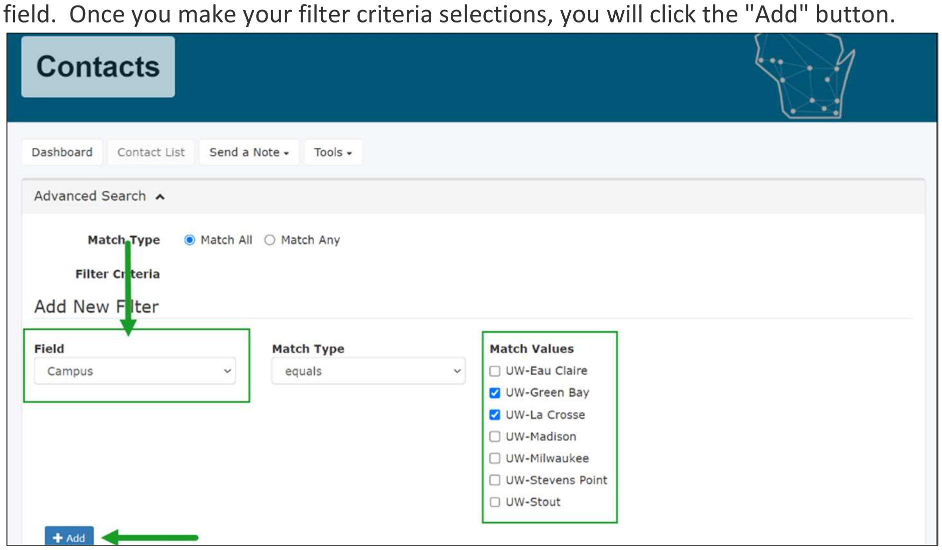


Advanced Search

The "Advanced Search" allows you to fully filter records "on the fly", essentially creating a temporary list view. Please see the image below for the button location.



This button will open the 'Advanced Search' area, where you will select the Filter Criteria from the "Field" drop-down list and then, depending on the field type, be presented with selections, text fields, date selectors, etc to utilize that criteria. For more information on working with filters click here. In this sample, it is a choose from a list type of field. Once you make your filter criteria selections, you will click the "Add" button.



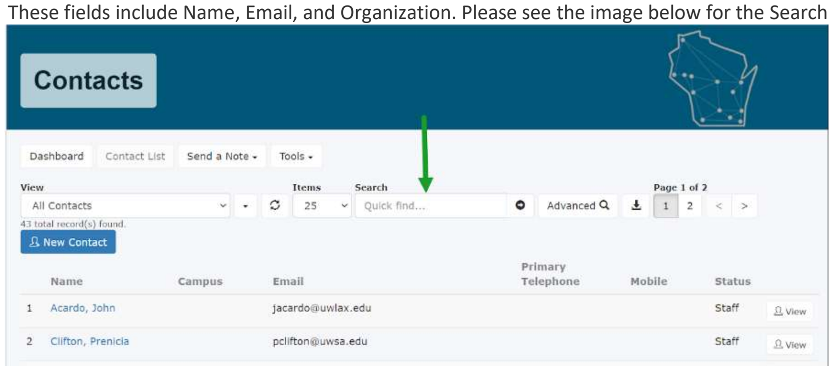
Once one filter criteria has been added, you can select an additional criteria from the drop-down and repeat the process as needed. If you wish to remove a criteria you can do so by clicking on the remove icon on the far right of each criteria (✖). The Advanced Search also features a "Match Type" with radio buttons for "Match All" and "Match Any". This means that if "Match All" is selected, the contacts must match all of the filter criteria created to be returned in the contact chooser list. If "Match Any" is selected, the contacts returned only have to match one of the existing filter criteria. They do not need to match all to be returned.

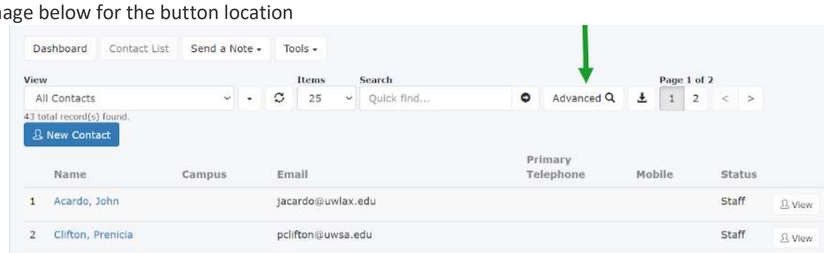
Create Views

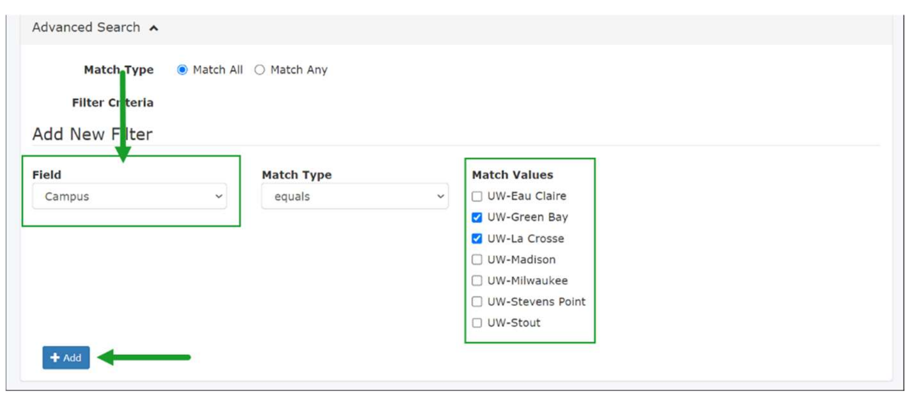
When searching for contacts via the Contact Database there are a few options available to you that are listed within this section:

- Pre-Configured Views
- Create List
- Edit
- Delete
- Copy

Pre-Configured Views

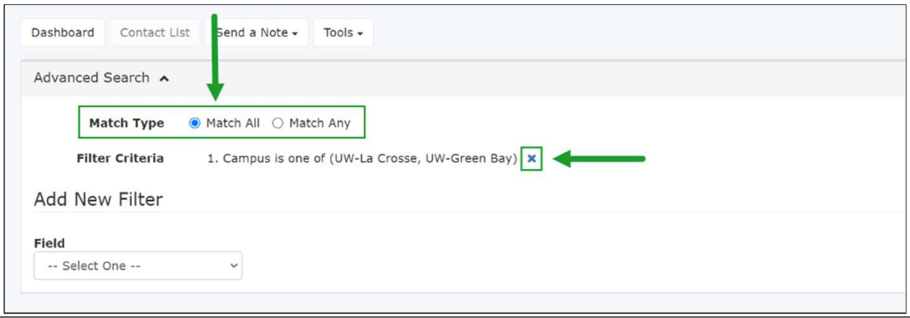
<table>
<tr><td>Quick Find</td><td>The "Search" field allows you to "Quick Find" contacts by entering any text into the box to search the default quick find fields. These fields include Name, Email, and Organization. Please see the image below for the Search button:


</td></tr>
<tr><td>Advanced Search</td><td>The "Advanced Search" allows you to fully filter records "on the fly", essentially creating a temporary list view. Please see the image below for the button location


This button will open the 'Advanced Search' area, where you will select the Filter Criteria from the "Field" drop-down list and then, depending on the field type, be presented with selections, text fields, date selectors, etc to utilize that criteria. [For more information on working with filters click here](). In this sample, it is a choose from a list type of field. Once you make your filter criteria selections, you will click the "Add" button.


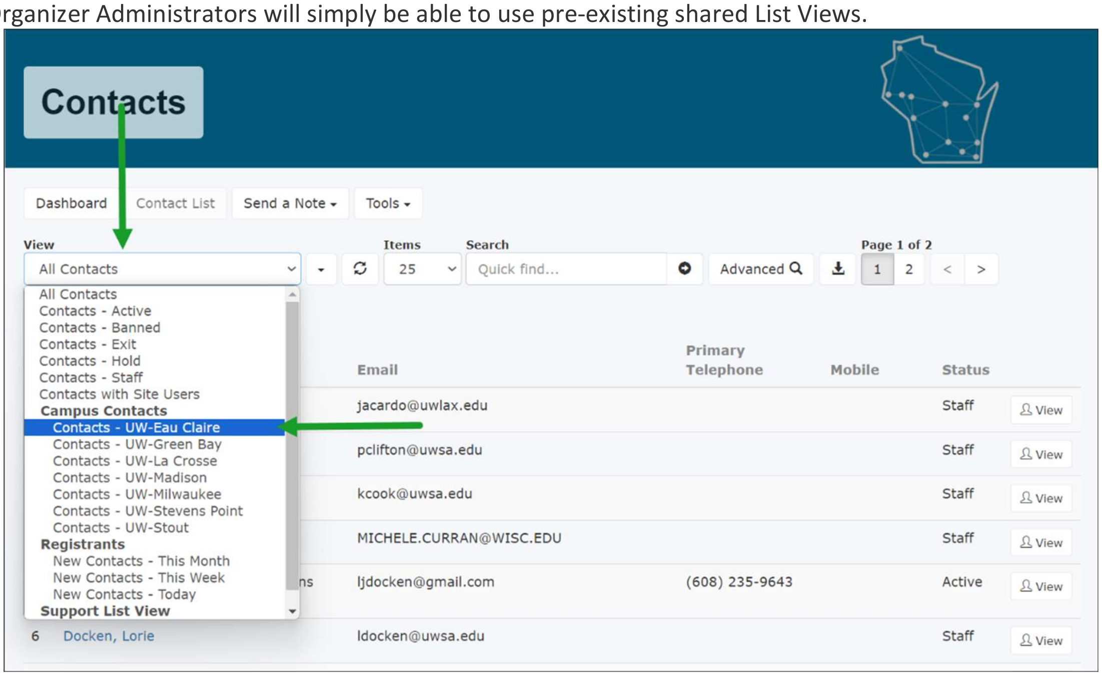
</td></tr>
</table>

Once one filter criteria has been added, you can select an additional criteria from the drop-down and repeat the process as needed. If you wish to remove a criteria you can do so by clicking on the remove icon on the far right of each criteria (✖). The Advanced Search also features a "Match Type" with radio buttons for "Match All" and "Match Any". This means that if "Match All" is selected, the contacts must match all of the filter criteria created to be returned in the contact chooser list. If "Match Any" is selected, the contacts returned only have to match one of the existing filter criteria. They do not need to match all to be returned.



Create List Views

List Views allow Contact Administrators to create views into the database based on a filter criteria they create and also permits them to set to contact fields desired as columns in the resulting view. List Views are for those types of searches the administrator or organizer will use over and over again. Only Contact Administrators can manage List Views. Organizer Administrators will simply be able to use pre-existing shared List Views.

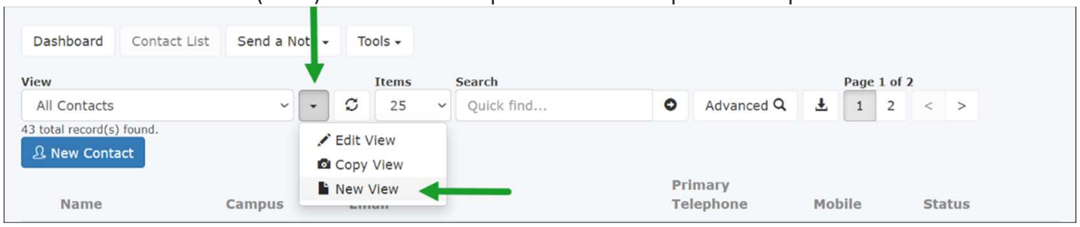


Once the List View is defined, it is available in the List View drop down either as a view that is available to all or as a private view which is unique to the user creating the view. If shared, all campuses will see the list view, however they will not be able to access contacts outside of their campus.

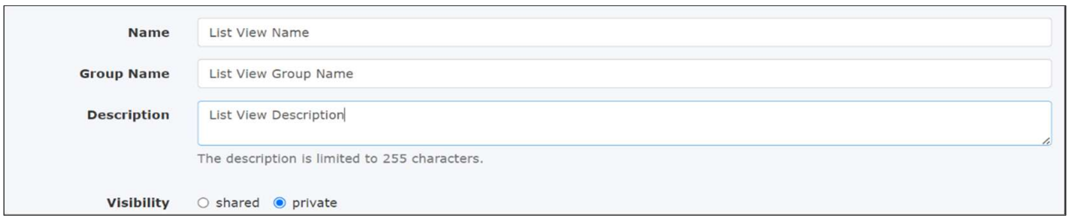
If you do create shared list views for your Program Organizers, please enter your campus short name (e.g.,"Stout") under the group field).

1. Log into your VolunteerMatters system with the Contact Administrator role.
2. Navigate to the Contacts page.

3. Click on the "v" button ( ) next to the drop-down list to expand the options and then click "New View".

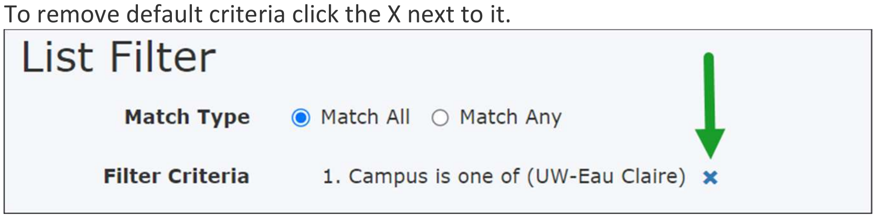


4. This will open the "List View Configuration" screen. Here you can enter a Name, Group Name, Description and Visibility (whether you want it for all administrators or just you).

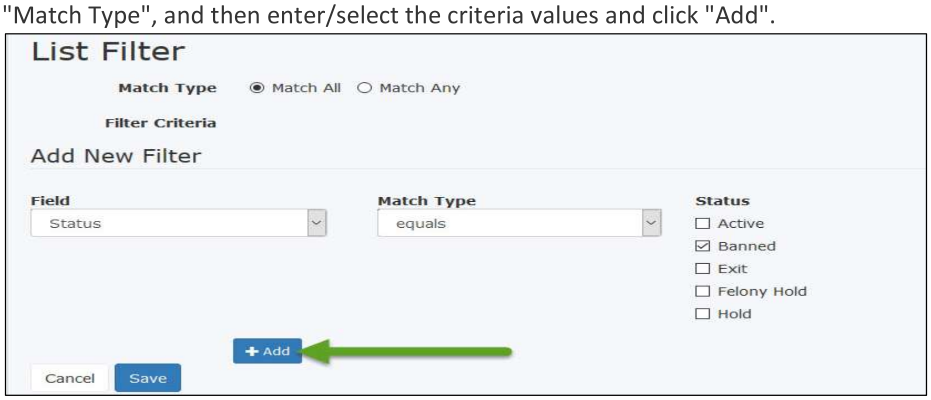


5. The filter will default to the filter of the first List View in your list view drop-down. To change, click 'Edit' on the List Filter.

6. To remove default criteria click the X next to it.



7. To add a new criteria, select from the "Field" drop-down what criteria you would like to filter by, select the "Match Type", and then enter/select the criteria values and click "Add".



8. Repeat for any additional filter criteria, then when ready, click "Save". This will return you to the main "List View Configuration" screen with your new filter displayed. Please see the article "Working with filters." for more information.

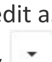
9. To add columns displayed in the List View you can simply drag and drop those fields from the "Available View Fields" group to the "Chosen View Fields" group and vice versa to remove columns/fields. You can drag and drop within the "Chosen View Fields" group to change the order of the columns in the list view.

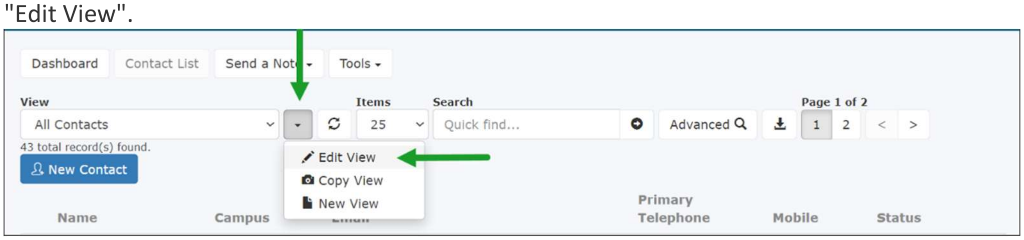
10. Choose the sort order (which is usually "Name") by dragging additional fields from the "Available Sort Fields" group to the "Chosen Sort Fields" group and vice versa to remove columns/fields. The field listed first will be the first field sorted by and then down the line if multiple sort fields are selected. You can drag and drop within the "Chosen Sort Fields" group to change which sort is applied first.

11. The default display order will be "Ascending". If you wish to utilize a "Descending" display order you will just need to check "Reverse" on the field in the "Chosen Sort Fields" group.

12. Click "Save" and then "Return to List".

Edit List Views

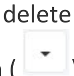
1. Log into your VolunteerMatters system with the Contact Administrator role.
2. Navigate to the Contacts page.
3. Select the list for which you wish to edit as the current list view.
4. Once loaded, click on the "v" button () next to the drop-down list to expand the options and then click "Edit View".

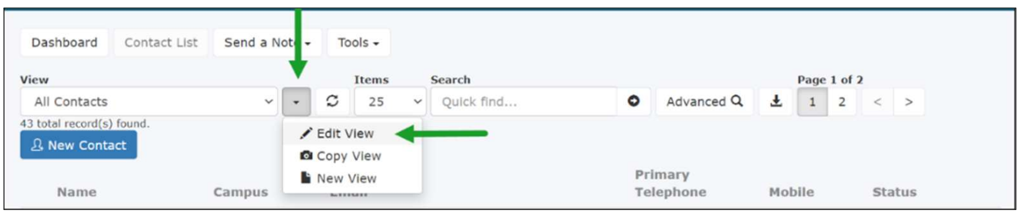


5. To edit you can change the Name, Group, Description and Visibility (whether you want it for all administrators or just you) and click "Save" and then "Return to List".

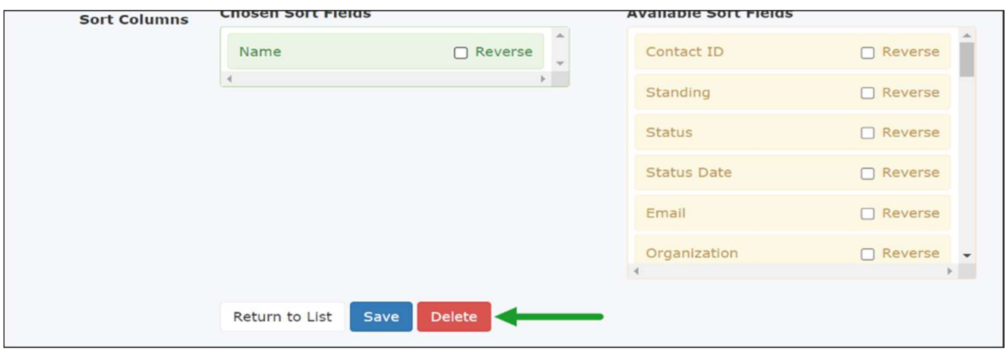
6. To edit the filter, click 'edit' on the List Filter and then delete and/or add criteria by clicking the X's or selecting from the drop-down what you would like to filter by and enter the criteria and click "Add". Then click "Save" and then "Return to List". Please see the article "Working with filters." for more information.
7. To edit the display columns, you can simply drag and drop those fields from the "Available View Fields" group to the "Chosen View Fields" group and vice versa to remove columns/fields. You can drag and drop within the "Chosen View Fields" group to change the order of the columns in the list view.
8. To edit the sort order, you can simply drag and drop fields from the "Available Sort Fields" group to the "Chosen Sort Fields" group and vice versa to remove columns/fields. The field listed first will be the first field sorted by and then down the line if multiple sort fields are selected. You can drag and drop within the "Chosen Sort Fields" group to change which sort is applied first.
9. Click "Save" and then "Return to List".

Delete List Views

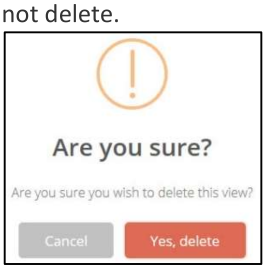
1. Log into your VolunteerMatters system with the Contact Administrator role.
2. Navigate to the Contacts page.
3. Select the list for which you wish to delete as the current list view.
4. Once loaded, click on the "v" button () next to the drop-down list to expand the options and then click "Edit View".



5. Scroll down to the bottom of the List View and click the "Delete" button.

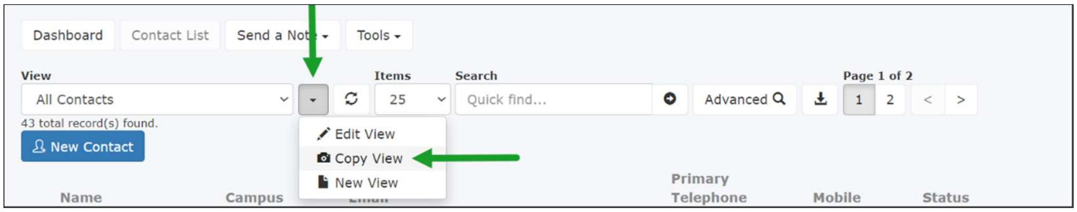


6. You will be presented with an "Are you sure?" window, click "Yes, delete" to delete the view or "Cancel" to not delete.



Copy List Views

1. Log into your VolunteerMatters system with the Contact Administrator role.
2. Navigate to the Contacts page.
3. Select the list for which you wish to copy as the current list view.
4. Once loaded, click on the "v" button ( ) next to the drop-down list to expand the options and then click "Copy View".
5. The new list view will open up in the "List View Configuration" screen with the name of "Copy of ....", where "..." is the name of the list view you copied. Continue with instructions for editing a list view.



This may seem like more work, but after the initial lists are complete it will give you a much greater amount of customization and control over the lists of data found within your VolunteerMatters system and are easily exported to a CSV spreadsheet.

Click here to learn about exporting list view results.

Reference: Job Aid Resources

The following job aids have been contained within this SOP and are listed here for easy review on specific matters.

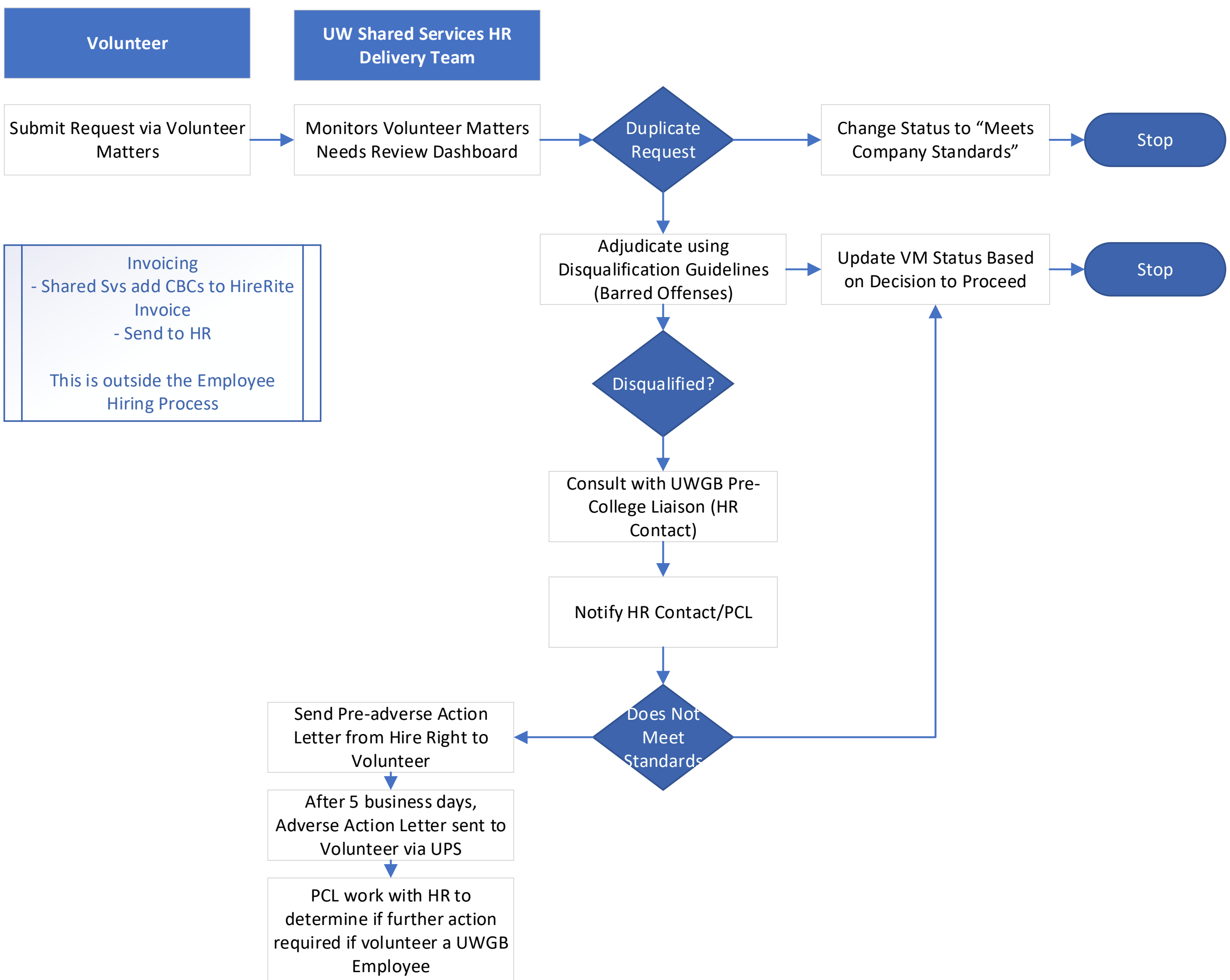
- VolunteerMatters - Portal Overview: https://docs.google.com/document/d/1Gkybf4J2mDhb6p7A0yL5i_v-tIY13-SAyw2zLPpBxHo/edit?usp=sharing
- VolunteerMatters Precollege Liaison - Adding Organizers to a Contact and Assigning Organizers to Projects: https://docs.google.com/document/d/1Y-SKEyFu6X6ltbbW0LZYigRvG7kmSo57alwZoUwAIqQ/edit?usp=sharing
- VolunteerMatters Precollege Liaison - Project Creation: https://docs.google.com/document/d/115CSnwoImI7cZYJnwlV-k0kwRZX6ALWcUJ9kUuUvlhI/edit?usp=sharing
- VolunteerMatters Precollege Liaison - Risk Management Guide (Credential Administration, Policy Auditing, Standard Risk Profiles) https://docs.google.com/document/d/1APOC7kPnye-Zppf4YlgLMQq7TinpM1ybVWpo_RNNLwI/edit?usp=sharing
- VolunteerMatters Precollege Liaison - Risk Management Guide (Requesting Additional Custom Credentials): https://docs.google.com/document/d/1fIFgLJCnN50cxq37Bkny0x5R_soUy47_FEXs59zEvoM/edit?usp=sharing
- VolunteerMatters Precollege Liaison - Contact Database: https://docs.google.com/document/d/1XN7SMQgSytqzPE5tG8dCiTvR65zPB9jbTITjqNiB52c/edit?usp=sharing
- VolunteerMatters UW Shared Services - Adding Administrative Roles (and Contact Segment/Branch Restriction) to a Contact: https://docs.google.com/document/d/10qB8Nx6B0lURrqsn3rnFtOBARdy4ZcfI3IqgIIR42p4/edit
- VolunteerMatters Volunteer - Quick Guide: https://docs.google.com/document/d/1H-Fc7cTVWympYwZao7XRMD6B7PFA4Z1VW1Jsx3JtrQ4/edit?usp=sharing
- VolunteerMatters Program Organizer – Project Management: https://docs.google.com/document/d/1jndBo1pGDdbIh4ir3bq0mG-lWNXyRmVUCkbGN9v2W5k/edit?usp=sharing
- VolunteerMatters Program Organizer - Contact Database: https://docs.google.com/document/d/1gEByup5GR__8d8bqXeRogdxAHLdIvcwMzX1VdTkeGic/edit?usp=sharing

Reference: Hire Rite Adjudication

This process reflects how the Volunteer Matters and Hire Rite Systems work together to complete a volunteers Criminal Background Check.

Volunteers have 21 days (although notice says 5) to utilize the link to complete a criminal background check, otherwise the access will expire.

The volunteer MUST accept the HireRite invitation (in addition to the VM invitation) to initiate HireRite.

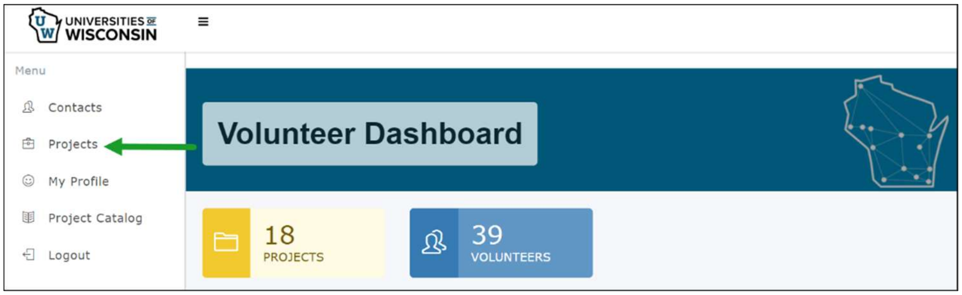


Reminder: update CBC expiration to two (2) years if volunteer serving at an overnight program activity.

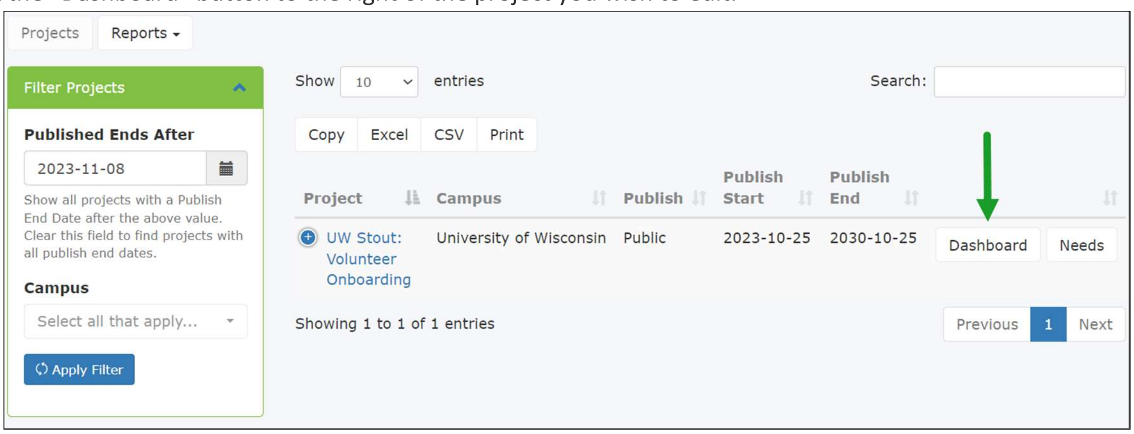
Reference: Project Catalog

The Project Catalog can be viewed from the Project Dashboard.

1. Click "Projects" (Briefcase Icon) from the main menu.



2. Click the "Dashboard" button to the right of the project you wish to edit.



3. Scroll down to the Project Catalog URL and click to open and view.

Reference: Volunteer Guide

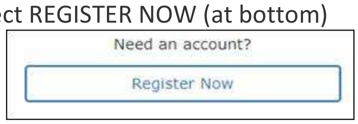
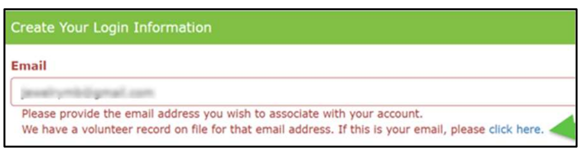
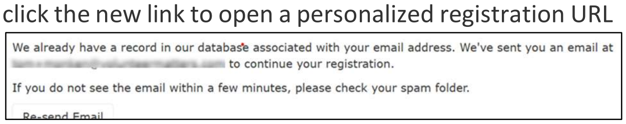
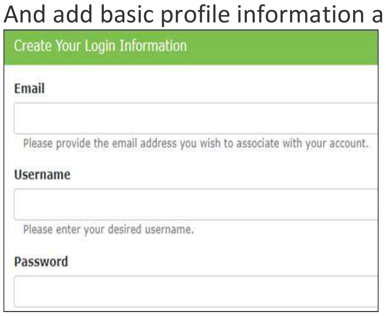
This section provides an instructional handout to aid volunteers in completing their profile responsibilities. Volunteers may use the Volunteer Quick Guide or see information below.

Once you have created a login and your profile, every time you visit Volunteer Matters you can view your assigned activities, update your profile, or find a new volunteer opportunity.

Create Login Registration Profile

Visit the VolunteerMatters link to complete this process.

1. Create a Login

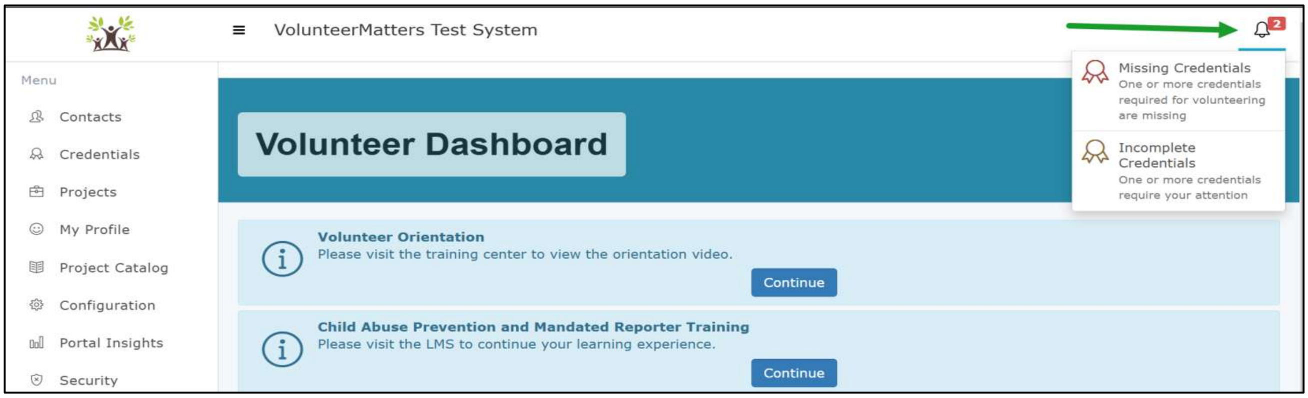
External UWGB	UWGB User
▪ Select REGISTER NOW (at bottom)  ▪ Enter email and CLICK HERE  Use the email account that you received instructions from. Do not use a different email as this will create a NEW PROFILE and you will not see your assigned training.. If you use a different email account, notify maines@uwgb.edu as this will change your view. ▪ You will receive a message to return to your email and click the new link to open a personalized registration URL  ▪ Create your username and password And add basic profile information and CONTINUE  Once complete, your dashboard will reflect trainings assigned to you.	▪ Select LOGIN for UW Employees and Students ▪ Use your assigned UW NET ID username/password Do not create a new profile  ▪ Once complete, your dashboard will reflect trainings assigned to you

2. Criminal Background Check: **You will receive an additional email from HireRite that you MUST accept to initiate the CBC** that may be assigned to you.

Monitor /Complete Assignments on the Dashboard

Upon login, the Volunteer Dashboard will automatically open. Actions/requirements waiting for completion by volunteer will be prominent on the screen. You may also scroll to My Assignments to view volunteer opportunities – or projects – that you have requested to be part of.

In some cases, you will have 5 days to respond before access is removed, as when completing the Criminal Background Check. Continue or Complete Application to initiate the assignment actions.

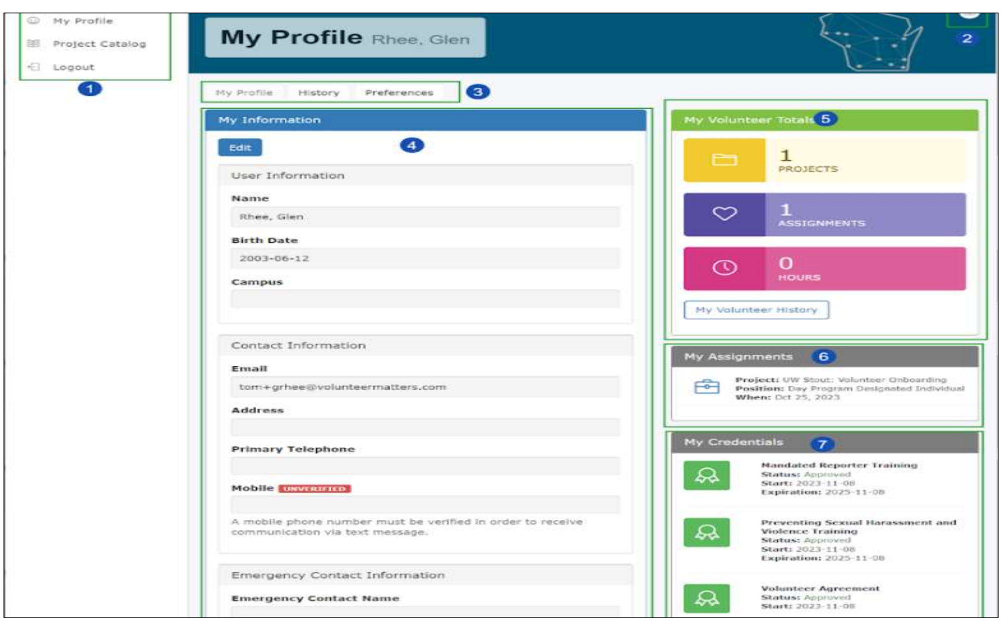


You will also be able to view any announcements or search for other volunteer opportunities.

Update Volunteer Profile

Once registered, a volunteer should keep *My Profile* updated with the most current information, such as a mobile phone number, set notification preference and view your volunteer history and completed credentials. The following links provide additional instructions:

Verify Mobile Number	https://support.volunteermatters.com/hc/en-us/articles/360053314274
Set Preferences	https://support.volunteermatters.com/hc/en-us/articles/360053324954



Standard Operating Procedure: Volunteer Matters
Youth Compliance
As of 6/03/2025

Find a Volunteer Opportunity

The Project Catalog contains all active and published volunteer projects that have current/future needs. Needs may include volunteers to work shifts, contribute items, perform tasks, or take on a longer-term position. Positions are also used for onboarding of different volunteer types.

To sign-up for a volunteer opportunity, **select an opportunity from the Project Catalog** – or - **use the invitation link** provided by your Program Organizer. The *Project Catalog* is located under the Menu on left side of screen. Follow the steps below:

Project Catalog Self- Selection	Invitation Link
▪ Open the Project Page ▪ Select the Campus you are interested in ▪ Locate a project and select *Learn More* ▪ Click the Volunteer button on the onboarding position; if you see "fulfilled" that position is not available  ▪ The Need Sign-Up page will open ▪ Complete credentials required You MUST complete the credentials before the system will sign you up for a project.	▪ Open invitation sent by Program Organizer ▪ Click the Volunteer button on the onboarding position ▪ The Need Sign-Up page will open ▪ Complete credentials required Your credentials will only appear at the onset of login. If you move to your dashboard or profile, the assigned credential actions will no longer be visible and you will need to logout and login again.

Users may return to the dashboard at any time by clicking the logo at the top-left of the screen.

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Upon completion of the credentials (assignments) you will be automatically signed up for the position selected.

Reference: Volunteer Required Training List

The list below reflects the required credentials training within Volunteer Matters that UWGB has determined meets UW System 625 requirements for camp volunteer positions.

Training	Completed Via	Volunteer	Youth Camp Staff/Volunteers			
			Camp Director	Health Supervisor	Camp Staff/Volunteer	Volunteer Exception
CBC	HireRite	If POT	X	X	X	
CPR Certificate	Upload		Optional	X	Supervisor Reqd	
Medication Management DPI	Upload		Optional	X		
Youth Protection Videos (3)			X	X	X	
Camp Operations Manual	Check Box		X	X	X	
Youth Event Agreement	Check Box		X	X	X	X
Youth Event Agreement Minor						
Volunteer Agreement	Check Box	X	X	X	X	
Archery Certificate	Upload				Optional	
Lifeguard Certificate	Upload				Optional	
Driver Authorization			X	Optional	Optional	

Volunteer Exception is an individual who is only serving for a specific non-custodial task, such as at a registration table or hallway guide and will have no direct contact with youth.

Reference: General Volunteer Processing

The Volunteer Matters system will be used for general volunteers who are not part of a youth activity. This process is unique to the steps outlined in ensuing sections and is as follows:

Use this process when an individual is volunteering at UWGB event or program where no compensation is provided and is not a youth activity. In some circumstances, a general volunteer may also be a temporary employee.

This volunteer is NOT involved in youth activities but may have a POT that requires a criminal background check.

<table>
<tr><td>Department</td><td>Complete a Volunteer Agreement, marking if volunteer is a POT
Forward to Administrator</td></tr>
<tr><td>Administrator</td><td>Add individual as a contact in Volunteer Matters
Open Volunteer Matters Project: General Volunteers Non Youth
Assign Volunteer to General Volunteer 2025 or General Volunteer POT 2025
<table>
<tr><th>Dates</th><th>Name</th></tr>
<tr><td>Aug 08, 2024 - Aug 31, 2025</td><td>Wellness Center Volunteer</td></tr>
<tr><td>Sep 01, 2024 - Aug 31, 2025</td><td>Tiny Earth Volunteer</td></tr>
<tr><td>Jan 01, 2025 - Dec 31, 2025</td><td>General Volunteer in POT 2025</td></tr>
<tr><td>Jan 02, 2025 - Dec 31, 2025</td><td>General Volunteer 2025</td></tr>
</table>
Create a new credential depending on volunteer activity (e.g. Wellness Center)
Each January you will need to create a new credential for the new year
Attach volunteers PDF Form to the Volunteer’s Contact Profile for the Volunteer Agreement credential that was assigned to them in prior step
Email contact if they are a POT for the criminal background check; see next page for example of email instructions</td></tr>
<tr><td>Volunteer</td><td>Receive email from Administrator and complete the assigned action steps.</td></tr>
</table>

Volunteers in POT Email Request

Thank you for volunteering for activities at UWGB. UGWB uses the VolunteerMatters platform to document our volunteer activity. We would ask that you visit the VolunteerMatters link to register and complete the criminal background check. You will not be approved for this activity until this has been completed.

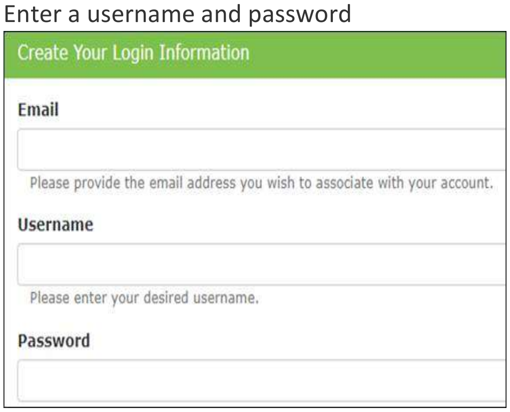
1. Create a Login

<table>
<tr><th>External UWGB</th><th>UWGB User</th></tr>
<tr><td>

- Select REGISTER NOW (at bottom)

- Enter email
  Use the email account that you received instructions from. Do not use a different email as this will create a NEW PROFILE and you will not see your assigned training.. If you use a different email account, notify maines@uwgb.edu as this will change your view.

- Enter a username and password



Upon entering this information, the system will recognize your email and you will be sent a new email with a personalized registration form URL (Registration Portal) to complete the registration form.

Once complete, your dashboard will reflect trainings assigned to you.

</td><td>

- Select LOGIN for UW Employees and Students
- Use your assigned UW NET ID username/password

Do not create a new profile

</td></tr>
</table>

2. Criminal Background Check: **You will receive an additional email from HireRite that you MUST accept to initiate the CBC** that may be assigned to you

If you have any questions or need more information about the volunteer registration process, please don't hesitate to reach out to me at 920-465-2781 or maines@uwgb.edu.

Your involvement and commitment are highly appreciated, and we look forward to working with you.

Marinette Theatre

The Marinette Theatre is a public program that is not within the Youth Protection Policy. However, to maintain youth protection, we have set the following for these productions:

Program Director	Marinette Theatre Manager Lauryn Albaugh ▪ Criminal Background Check ▪ Youth Agreement ▪ Prohibited Conduct ▪ Mandated Reporting ▪ Youth Protection
Crew – Paid	All crew will have a Criminal Background Check ▪ Criminal Background Check ▪ Volunteer Agreement (forwarded by Program Director and uploaded to VolunteerMatters)
Crew – Unpaid Limited Volunteers	Volunteer Agreement (forwarded by Program Director and uploaded to VolunteerMatters)

Reference: Credential Set Up & Requirements

This section is a one-stop shop for understanding how credentials are set up in Volunteer Matters.

Position Credential Requirements

The individual serving in an activity requires the following credentials prior to participating:

Training Credentials	Completed Via	Volunteer	Youth Camp Staff/Volunteers				
			Camp Director	Health Supervisor	Staff or Volunteer	Minor Volunteer	Limited Volunteer
CB	HireRite	If POT	X	X	X		
CPR Certificate	Upload		Optional	X			
Driver Authorization			Optional	Optional	Optional		
Medication Management DPI	Upload		Optional	X			
Youth Protection Videos (3)	Check Box		X	X	X		
Camp Operations Manual	Check Box		X	X	X	X	
Youth Agreement	Check Box		X	X	X		
Youth Agreement Minor	Check Box w/Optional Upload				X	X	
Youth Agreement Limited	Check Box						X
Youth Agreement Limited PDF	Upload						X
Volunteer Agreement	Check Box	X					

Position	Description	Suggested Credentials
Health Supervisor	Individual responsible for routine and emergency health care supervision, such as first aid triage, medication management and emergency medical response. This individual must have at a minimum a CPR certification from the American Red Cross. This individual may also be in charge of other Health Staff.	▪ CPR Certification Attachment ▪ Medication Management ▪ Youth Agreement ▪ CBC ▪ Operations Manual ▪ Mandated Reporter ▪ Preventive Sexual Harassment ▪ Youth Protection
Camp Director	Individual responsible for the operation of the program, staff supervision, food and health services, and other supportive services. Must be at least 21 years of age with two or more years of supervisor or administrative experience in an organized camp or children's program.	▪ Youth Agreement ▪ CBC ▪ Operations Manual ▪ Mandated Reporter ▪ Preventive Sexual Harassment ▪ Youth Protection
Staff (Paid Position)	Responsible for interacting with program participants, complete operational tasks and see to participant safety. Follows operational guidelines including but not limited to participant check in/check out, safety, and reporting incidents. Must be 2 years older than participants in the program and may be asked to complete CPR Certification. May be assigned as a Designated Adult who is counted in the supervision ratio. Overnight Position Description Includes: Individual will sleep overnight at the campus while program is in operation and have oversight of participants and the housing area where participants reside.	
Volunteer	Responsible for interacting with program participants, complete operational tasks and see to participant safety. Follows operational guidelines including but not limited to participant check in/check out, safety, and reporting incidents. Must be 2 years older than participants in the program and may be asked to complete CPR Certification. May be assigned as a Designated Adult who is counted in the supervision ratio.	

	Overnight Position Description Includes: Individual will sleep overnight at the campus while program is in operation and have oversight of participants and the housing area where participants reside.	
Volunteer Minor	Responsible for interacting with program participants, complete operational tasks and see to participant safety. Follows operational guidelines including but not limited to participant check in/check out, safety, and reporting incidents. Must be 2 years older than participants in the program. Minors cannot supervise minors, even if 2 years older than the youth participant. Therefore a minor camp staff is limited functionality.	▪ Youth Agreement Minor ▪ Potential CBC Volunteers under age of 18 will require parent/guardian signature on the Youth Agreement.
Limited Volunteer	*An individual at a covered activity who has no direct interaction with participants* for a limited and defined time (such as a one-time-only basis or a scheduled presentation series) who is never left alone with youth participants and does not share personal contact information with youth participants. e.g., Guest Speakers, Referees, Private Family Aids, Registration Booth or Camp Errands. No CBC is required.	▪ Youth Agreement Limited no CBC ▪ Youth Agreement Limited PDF Either one may be used; note the PDF choice requires a signed document to be uploaded to Volunteer Matters, the other is an electronic signature.
General Volunteer	*Individual assigned an activity or role **outside of youth activities***. See *Reference – General Volunteer Processing* Section. E.g. individual working with CSET during the summer at Lower Fox River. Sponsor will need to verify with HR if employee is in a Position of Trust with the volunteer role. A POT requires a CBC.	▪ Volunteer Agreement ▪ Potential CBC if in a Position of Trust

Existing Credential Set Up

Credentials assigned to positions have been set up in the system for the following expiration dates and instructions:

Credential	Training Review	Duration of Credential	System Set Up Description
CBC	Completed through HireRite	2 Years Overnight 4 Years Day Camp	
Youth Agreement	Electronic Signature	2 Years	I have read, understand, and agree to abide by this agreement as part of my participation in this activity. Download a printable copy of this agreement for your records at (https://www.uwgb.edu/getmedia/7b3c6bfa-8f89-4787-9e65-46219c995445/Youth-Event-Agreement.pdf).
Youth Agreement Minor	Electronic Signature Optional Upload Certificate	1 Year	I agree to abide by the Youth Agreement for Minor Staff and upload a signed copy with parent/guardian signature prior to start of the youth activity for which I am participating. Requires parental signature.
Youth Agreement Limited No CBC	Electronic Signature	2 Years	Use for limited volunteers who will have no direct interaction, such as an guest instructor.
Youth Agreement Limited PDF	Upload Certificate	2 Years	Used for when camp wants to have volunteers sign a form to be uploaded. Same form as Limited No CBC.
Operations Manual	Electronic Signature	2 Years	Volunteer will review the Camp Operations Guide 2025 and understand and perform the procedures outlined within during the program. This includes check in/check out, medication disbursement, reporting incidents, and other camp operation procedures. The Guide may also be found on the UWGB Youth Protection webpage at Youth Protection - Compliance - Safety, Risk and Compliance.
Video Mandated Reporter	Electronic signature after watching video	4 Years	View the Mandated Reporter video link and sign the electronic agreement. (https://mediaspace.wisconsin.edu/media/Mandated+Reporter+Training/1_3ird8mui
Video Preventive Sexual Harassment	Electronic signature after watching video	4 Years	View the Preventing Sexual Harassment and Violence video link and sign the electronic agreement. (https://mediaspace.wisconsin.edu/media/Sexual+Violence+and+Harassment+Prevention+Training/1_u3o03564)
Video Youth Protection	Electronic signature after watching video	4 Years	View the Youth Protection videos and sign the electronic agreement. Links:

Credential	Training Review	Duration of Credential	System Set Up Description
			Youth Protection Training - Introduction Youth Protection Training - How Abuse Happens Youth Protection Training - Appropriate Interactions Youth Protection Training - Abuse Prevention Supports
CPR Certification	Uploaded Certificate	2 Years from date of Certificate System is set for automatic, which is blank; must enter a date	Participants must provide a copy of their certificate to upload for this credential. You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. **Your credential will not be considered complete until you upload the certificate.**
Medication Management	Uploaded DPI Certificate	2 Years	Participants must save a copy of their documentation of the assessment test and passing grade to upload for this credential. Click here to take the training. You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. **Your credential will not be considered complete until you upload the certificate.**
Epi Pen/Anaphylaxis	Uploaded Certificate	4 Years from date of Certificate ▪ System is set for automatic, which is blank; must enter a date ▪ Note: American Red Cross Certificates are good for only 2 yrs	Participants must provide a copy of their certificate to upload for this credential. You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. **Your credential will not be considered complete until you upload the certificate.**
Lifeguard	Uploaded Certificate	1 Year from date of Certificate	Participants must provide a copy of their certificate to upload for this credential. You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. **Your credential will not be considered complete until you upload the certificate.**
Archery	Uploaded Certificate	1 Year from date of Certificate	Participants must provide a copy of their certificate to upload for this credential. You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. **Your credential will not be considered complete until you upload the certificate.**
Volunteer Agreement	Uploaded Certificate	1 Year from date of Certificate	Only used for non-youth volunteers. Participants must provide a copy of their agreement to upload for this credential. You may click "I will upload file(s) later" and upload the file from your profile after completing this training. You may do so by returning to "My Profile" in this Volunteer Portal. **Your credential will not be considered complete until you upload the certificate.**