

Standard Operating Procedure: Volunteer Matters

Youth Compliance

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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 complete 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
<ol style="list-style-type: none">1. Request Administrative Rights2. Create Projects3. Assign to Organizers4. Set Up Credentials5. Manage Contact Database	<ol style="list-style-type: none">1. Update Project Set Up Details2. Create Project Needs (positions, credentials)3. Assign Volunteers4. Send Invitations5. Monitor Credential Assignments6. Use Reporting Tools7. Manage Contact Database	<ul style="list-style-type: none">▪ 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)

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

Volunteer Matters Help: support@volunteermatters.com

Volunteer Matters Zoom: <https://calendly.com/volunteermatters-support/enterprise-support-quick-zoom>

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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

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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.

Risk Profiles Defined

Within the Universities of Wisconsin VolunteerMatters system, there are 3 standard Risk Profiles associated with Volunteers. Another term for Risk Profile – is the job or position the volunteer will hold. The Risk Profile determines what type of credentials the volunteer will need, e.g. CPR Certification, Criminal Background Check, or Youth Training.

Targeted Profiles

You will need to create targeted profiles that are unique to your campus or camp program.

- Health Services Staff
- Camp Director
- Residential Supervisor
- Dorm Volunteer

Basic Profiles

- **One-Time Volunteer**

An individual invited to visit a program to make a presentation, demonstration, or other special situation 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, One-Time Presenters.

- **Authorized Adult**

Individuals, age 18 and older, paid or unpaid, who are authorized to interact with youth participants as part of a covered activity. This includes, but is not limited to, faculty, staff, volunteers, graduate and

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undergraduate students, student-athletes, interns, and individuals associated with third party covered activities. Authorized adults cannot have unsupervised access to minors.

e.g., Program Instructors, Teaching Assistants, Tour Guides, Food Service.

- **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. Additional training is required for authorized adults serving as designated individuals.

e.g., Faculty Leading, 1:1 Activities, Program Counselors, Program Directors, Resident Life Staff during youth programs.

Credentials Defined

Credentials are assigned to volunteers based on their risk profile – or position. The risk profile determines what type of credentials the volunteer will need.

If your campus has specific credentials that are not part of the basic list, contact Shared Services to request they be added to Volunteer Matters. Upon project entry, you will be able to select these credentials for your volunteer risk profiles.

- Electronic Agreements
 - Liability Waiver
 - Volunteer Agreement
- Certifications
 - 3rd Party Training Certificate (CPR, etc.)
- Criminal Background Check (HireRight)
- Integrated/Embedded Training
 - Mandated Reporter
 - Preventing Sexual Harassment and Violence
 - Youth Protection Training
 - 3rd Party Training

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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 <i>Login for UW Employees and Students</i> to add and manage Projects (Camps)
University Employee/Volunteer	https://uw.volunteermatters.org/login	<i>Login for UW Employees and Students</i> 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

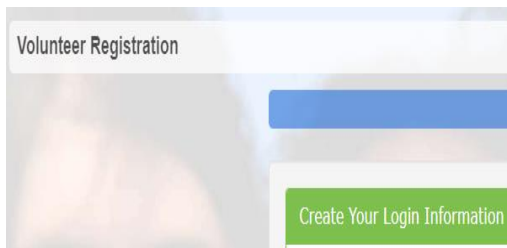
Administrator Login



Employee Volunteer Login



Volunteer Initial Login



Volunteer Matters Help Desk: support@volunteermatters.com

Schedule Zoom Call: : <https://calendly.com/volunteermatters-support/enterprise-support-quick-zoom>

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CAMPUS ADMINISTRATOR FUNCTIONS

Summary Duties

- Request Administrative Rights
- Create a new volunteer project [[Create a New Volunteer Project PDF](#)]
- Assign to Program Organizer [[Assign to Organizer PDF](#) and [Add Organizer PDF](#)]
- Set Up Credentials [[Manage/Audit Credentials PDF](#)]
- Manage Contact Database

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

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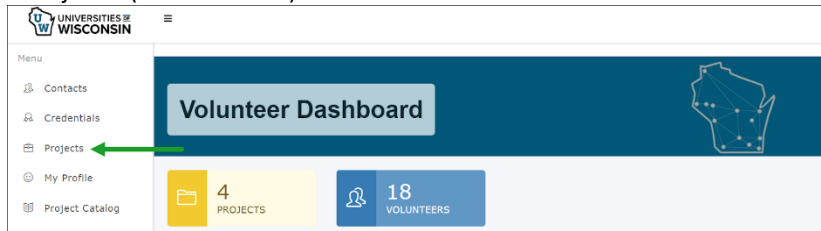
Create Volunteer Project

A Project should be created for every sponsored program where volunteers are necessary for program operation.

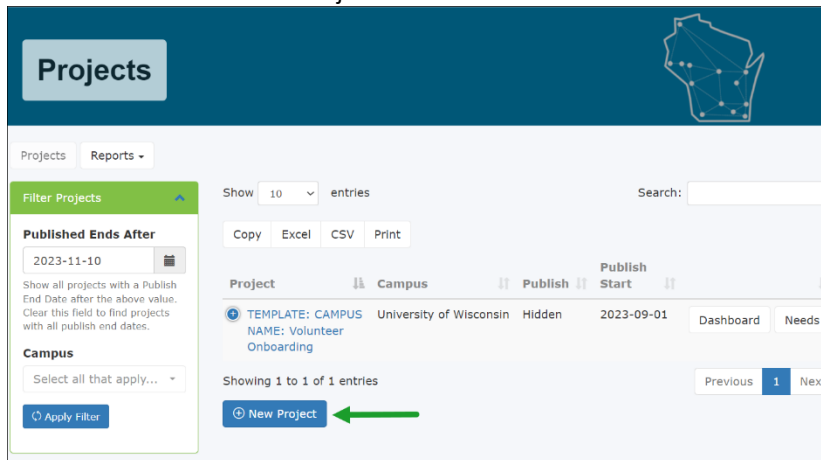
Use the [Create a New Volunteer Project PDF](#) or the instructions below.

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.
	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.

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Section	Field	Details
	Email Reply-To Address	Update to the Project Organizer Email Address
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

Identification

Campus

UW-Eau Claire ✓

The primary branch/site/location this project is associated with. If the project is not affiliated with a specific site, it is recommended to select the headquarters or organization site.

Unique Name

UW-Eau Claire: Youth Camps ✓

Provide a unique name for this project.

Description

TBD ✓

The description is intended to provide a summary of the project to volunteers.

Project Image URL Choose Image Clear

Designate an image that reinforces the branding or goals, or intended beneficiaries of the project. An image can be uploaded to your project image library within your VolunteerMatters site.

Background Image URL

Publish Mode

Public ▼

The Publish Mode defines which users will be able to see this project in the Project Catalog. The Project Catalog is the central resource for volunteers to search, browse and sign-up for your volunteer project needs.

Publish Start Date

2023-09-01 ✓ 📅

The date the project should start appearing in the project catalog.

Publish End Date

2024-09-01 ✓ 📅

Email From Name

Override the system from name for emails sent from this project

Email Reply-To Address

Override the system reply-to address for emails sent from this project

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Project Need Types

You may exclude specific types of needs from this project. This should be done at project creation. Disabling need types once volunteers have already been assigned has complicated side effects. However, enabling a need type that was originally disabled is safe.

- Exclude Items**
Select if Items will not be used for this project
- Exclude Tasks**
Select if Tasks will not be used for this project
- Exclude Positions**
Select if Positions will not be used for this project
- Exclude Shifts**
Select if Shifts will not be used for this project

Cancel Save

Assign Project Organizer

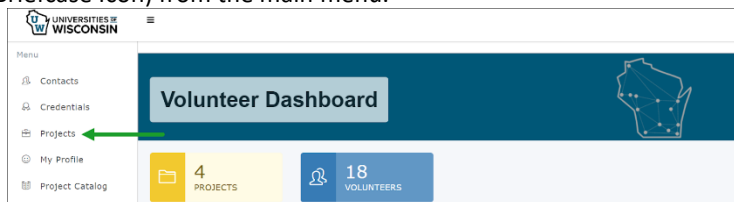
A Project should be created for every sponsored program where volunteers are necessary for program operation.

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

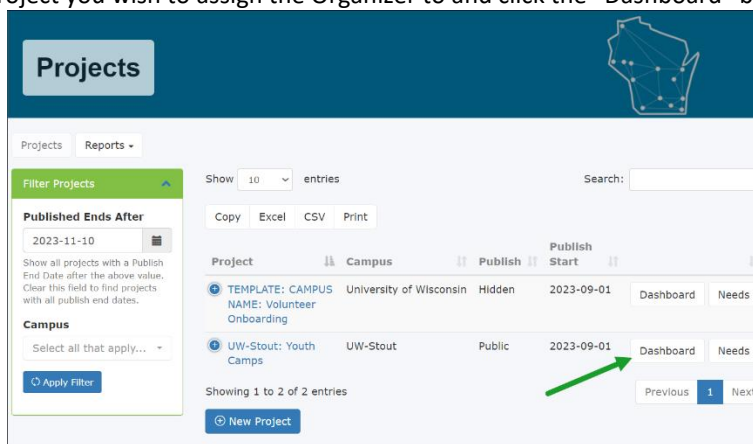
If your Program Organizer has never logged-in to the VolunteerMatters portal in the past, please ask them to first visit <https://uw.volunteermatters.org> and login with their UW Net ID. This will automatically create a user in the VolunteerMatters portal that will then be available to the UW Shared 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.**

General Volunteers Outside of Youth Activities: The Program Organizer to *General Volunteer Activities* is always the Administrator.

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.

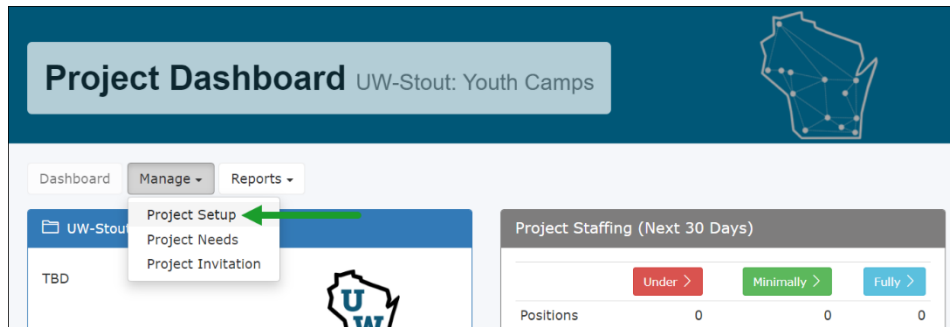


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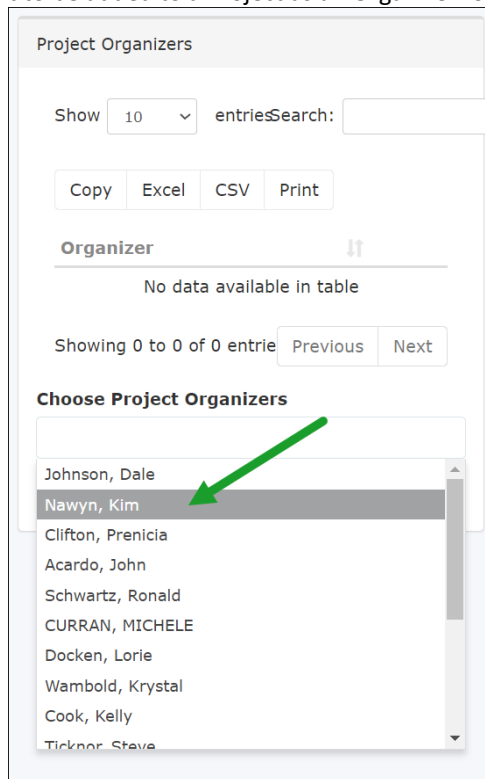
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- This will open the "Project Dashboard" page. Click the "Manage" drop-down button and select "Project Setup".



- 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](#).



- Then click "Add Organizers".

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The screenshot shows a web interface titled "Project Organizers". At the top, there is a "Show" dropdown menu set to "10" and an "entriesSearch:" input field. Below this are four buttons: "Copy", "Excel", "CSV", and "Print". A section titled "Organizer" contains a table with the message "No data available in table" and a double-headed arrow icon. Below the table, it says "Showing 0 to 0 of 0 entries" with "Previous" and "Next" buttons. A section titled "Choose Project Organizers" has a search bar containing "Nawyn, Kim" with a close icon. At the bottom left of this section is a blue "Add Organizers" button, which is pointed to by a green arrow.

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.

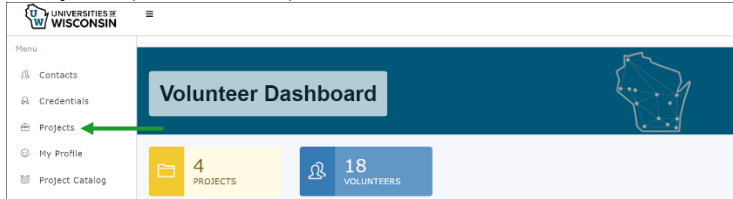
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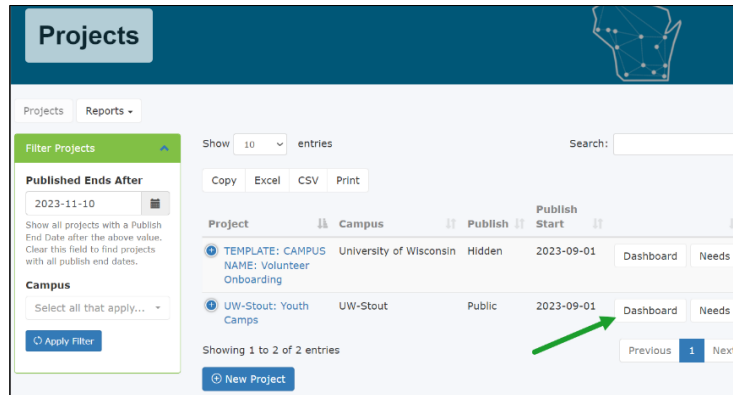
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Assign Organizer to an existing Project

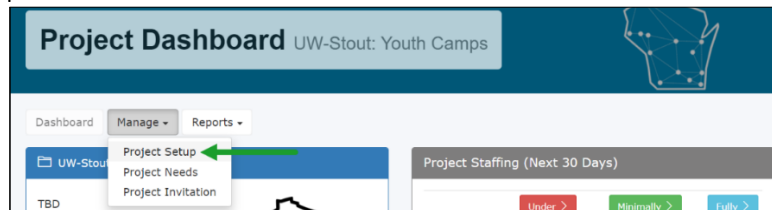
1. Log into VolunteerMatters with the Project Administrator role.
2. Click "Projects" (Briefcase Icon) from the main menu.



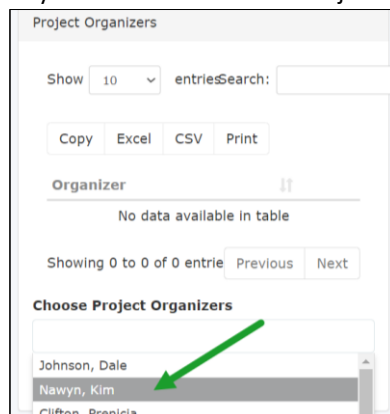
3. Locate the Project you wish to assign the Organizer to and click the "Dashboard" button.



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](#).

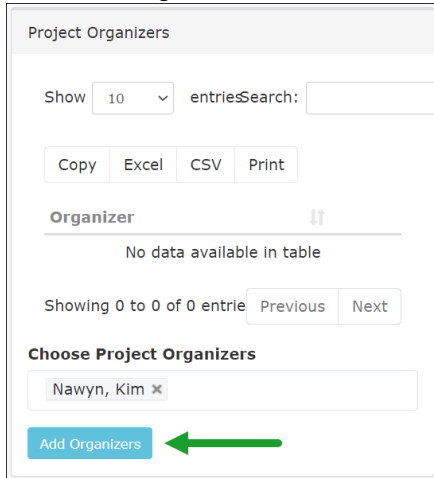


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6. Then click "Add Organizers".



The screenshot shows a web interface titled "Project Organizers". At the top, there is a "Show" dropdown menu set to "10" and an "entriesSearch:" input field. Below this are four buttons: "Copy", "Excel", "CSV", and "Print". A section titled "Organizer" contains a table with the message "No data available in table". Below the table, it says "Showing 0 to 0 of 0 entries" with "Previous" and "Next" buttons. A section titled "Choose Project Organizers" has a search input field containing "Nawyn, Kim" with a close button. At the bottom left, there is a blue "Add Organizers" button, which is pointed to by a green arrow.

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.

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Manage Credentials

Use the [Manage/Audit Credentials PDF](#) or follow instructions below.

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.

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

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
3. Submit to ServiceDesk@support.wisconsin.edu

The following credential settings are part of the template:

Field	Description
Credential Type	Agreement, Background Check, Certification, Learning, References Almost all custom credentials will be either Agreement, Certification, or Learning. For a high level view of credentials click here.
Credential Title	The volunteer will see this title; it should be named something they will understand. Example: UWGB Operations Manual
Active Status	Change to TRUE, unless existing Credential you wish to remove from active status, in that case change to FALSE
Issued By	Enter your name or campus. Example: UW-Green Bay
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.

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Field	Description
	<p>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.</p>
Agree-To Statement	<p>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).</p> <p>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.</p>
Signature Type	<p>This setting is what will be displayed to the volunteer and what is required from them to submit. The options are:</p> <ul style="list-style-type: none">▪ 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.
Age of Consent	<p>The value determines whether a parent/guardian signature is also required. Those below the age of consent are required to provide a guardian signature.</p>
Allow File Upload	<p>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.</p>
Credential Always Required	<p>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.</p>
Default Status	<p>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.</p> <ul style="list-style-type: none">▪ Approved (no approval process required - typically for electronic agreements only)▪ Review (a precollege liaison must review and approve)▪ 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	<p>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.</p> <ul style="list-style-type: none">▪ None - The credential never expires.▪ Duration - The credential will expire after X number of months. 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".
Exemption Age Direction	<p>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. 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.</p>

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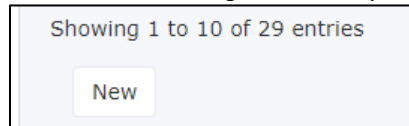
Youth Compliance

As of 2/07/2024

Field	Description
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). However, if a precollege liaison updates the credential, other expiration policies may apply.

Exception: UW Shared Services may provide an exception for you to add a Credential using this method:

- Select Configuration from menu at the side
- Select NEW from bottom of Configuration entry



- Add prompts for new credential fields

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Audit Credential Conflicts

When the role of managing credentialing conflicts transitions to someone other than Administrator, the Administrator should periodically review the credential conflicts for policy integrity.

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. We recommend a weekly review and monthly in-depth analysis.

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

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.

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>.

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PROGRAM ORGANIZER FUNCTIONS

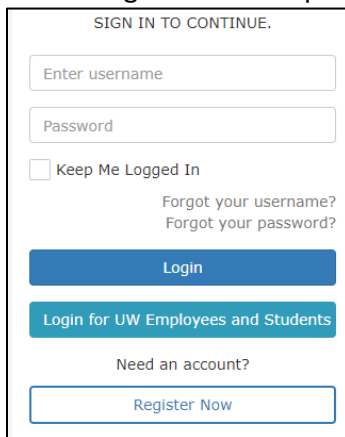
The Pre-College Liaison will create your project (program) for you in Volunteer Matters. The project created for you will not contain job roles, but instead it will serve as the project framework or “shell”. The Pre-College Liaison will enter the Project Name, Publish Start Date, Publish End Date, and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

- Update Project Set Up/Details
- 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”



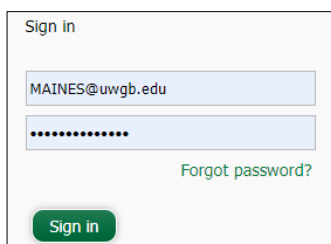
The screenshot shows a login form titled "SIGN IN TO CONTINUE." It includes fields for "Enter username" and "Password", a checkbox for "Keep Me Logged In", and links for "Forgot your username?" and "Forgot your password?". There are three buttons: "Login", "Login for UW Employees and Students", and "Register Now". A link "Need an account?" is also present.

3. Select your Organization



The screenshot shows a dropdown menu with the text "Select Organization" and a "GO" button.

4. Login using your UW Net ID credentials:



The screenshot shows a "Sign in" form with a text input field containing "MAINES@uwgb.edu", a password field with masked characters, and a "Forgot password?" link. A "Sign in" button is at the bottom.

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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.

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*

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: 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.

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.

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Add Project Needs

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, would need to be added before you can select these as positions for your project.

Targeted Positions

Position	Description	Suggested Credentials
Health Camp Staff	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.	<ul style="list-style-type: none"> ▪ CPR Certification Attachment ▪ Medication Management ▪ Youth Volunteer 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.	<ul style="list-style-type: none"> ▪ Youth Volunteer Agreement ▪ CBC ▪ Operations Manual ▪ Mandated Reporter ▪ Preventive Sexual Harassment ▪ Youth Protection
Volunteer Supervisor	Responsible for oversight and supervision of participants and any authorized volunteers. Will engage with participants during camp and ensure operational protocols are followed. May be requested to be CPR Certified.	<ul style="list-style-type: none"> ▪ Youth Volunteer Agreement ▪ CBC ▪ Operations Manual ▪ Mandated Reporter ▪ Preventive Sexual Harassment ▪ Youth Protection
Volunteer	Responsible for interacting with program participants and complete operational tasks such as check in/check out 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.	<ul style="list-style-type: none"> ▪ Youth Volunteer Agreement ▪ CBC ▪ Operations Manual ▪ Mandated Reporter ▪ Preventive Sexual Harassment ▪ Youth Protection
Volunteer Overnight	Individual responsible for supervision of youth participants who is at least 2 years older than participants in the program. This individual will also sleep overnight at the campus while program is in operation and have oversight of participants and the housing area where participants reside.	<ul style="list-style-type: none"> ▪ Youth Volunteer Agreement ▪ CBC ▪ Operations Manual ▪ Mandated Reporter ▪ Preventive Sexual Harassment ▪ Youth Protection
General Volunteer	Individual assigned an activity or role outside of youth activities. 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. If they are, then a CBC is required prior to the program start date.	<ul style="list-style-type: none"> ▪ General Volunteer Agreement

Basic Positions

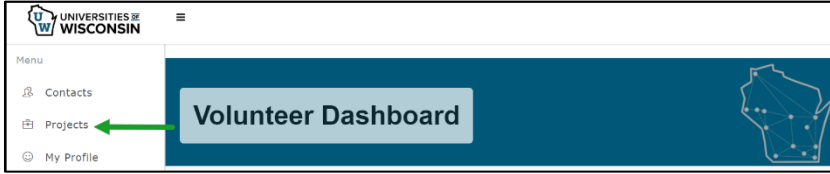
Position	Description
One-Time Volunteer	An individual invited to visit a program to make a presentation, demonstration, or other special situation for a limited and defined time (such as a one-time-only basis or a scheduled presentation series) who is never left alone with youth participants and does not share personal contact information with youth participants. e.g., Guest Speakers, Referees, Private Family Aids, One-Time Presenters.
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. e.g., Program Instructors, Teaching Assistants, Tour Guides, Food Service.
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. Additional training is required for authorized adults serving as designated individuals. e.g., Faculty Leading, 1:1 Activities, Program Counselors, Program Directors, Resident Life Staff.

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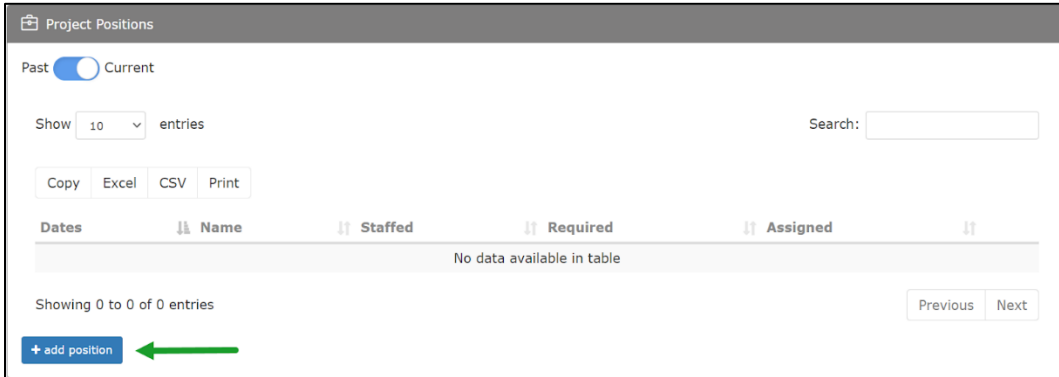
1. Click "Projects" (Briefcase Icon) from the main menu.



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.
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	<p>For each position, you may specify one or more credentials that may be required to sign-up for this position. Click on each credential listed that is required for the position. For example, one position may require a special background check, a drivers license, or a medical certification. You do not need to specify those globally required credentials as they are included by default as all volunteers must have them.</p> <p>If there are additional credentials required for a specific position, you may need to add a new credential prior to adding the risk profile.</p>

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Project Position Need

Name

Description

Default Credited Hours

Minimum Required **Maximum Required**

Start Date **End Date**

Minimum Age

Required Credentials

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

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

Project Positions

Past Current

Show entries Search:

Dates	Name	Staffed	Required	Assigned	
Mar 01, 2024 - Mar 02, 2024	Health Supervisor	Under	1	0	<input type="button" value="Assign"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

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.

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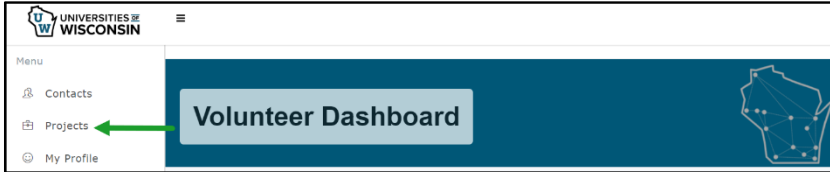
Youth Compliance

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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.

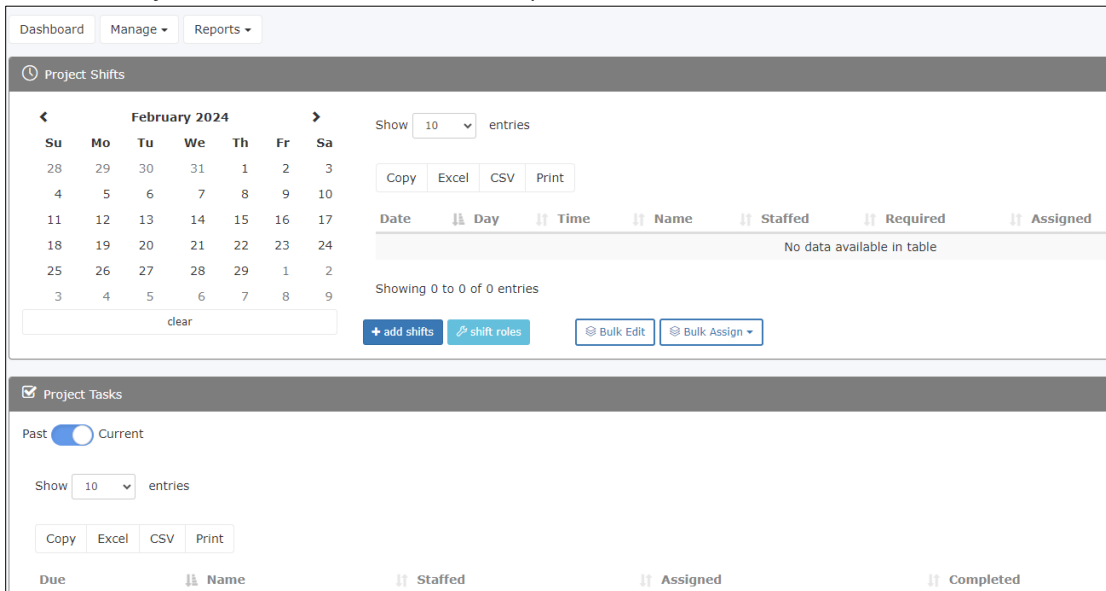
1. Click "Projects" (Briefcase Icon) from the main menu.



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



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



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

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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

A screenshot of a project selection interface. It shows a project titled "Test Camp 2024 #1" with a status of "Public" and dates "2024-02-14" to "2024-02-23" and "2024-02-06". There are two buttons: "Dashboard" and "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

- Enter Volunteer information

A screenshot of a "Contact Detail" form for "Schevers, Patti". The form has an "Edit" button and a "Send a Note" button. The "Basic Information" section includes:

- Name: Patti Schevers
- Birth Date: (empty field)
- Email: scheverp@uwgb.edu
- Contact Since: 2024-02-06
- Campus: UW-Green Bay

If volunteer is not currently listed within the Contact Database, you will have to exit and create a contact profile before this step.

- Save. You may always return and edit details or volunteer as needed. Se

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

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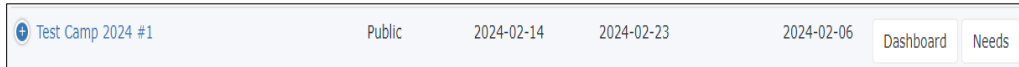
Invite Project Volunteer

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.

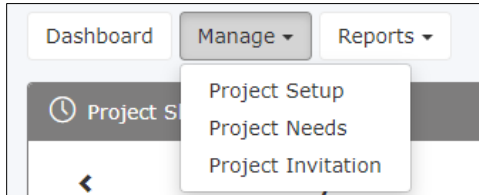
Do not use the Project Needs function to send an email to a volunteer, it will not show up in the volunteer email box.

1. Open Project Dashboard

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



2. Select Manage / Project Invitation



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

Choose Volunteers

Contacts already in the Contact Database. If a contact is not listed, you may add them in the next text field. You do not have to list all your potential volunteers in the Contact Database but it is a good idea so as to use them for future projects.

- 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.

Volunteer Recipients

Choose Volunteers

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

Choose Contact(s)

Schevers, Patti; Schultz, Abby; Volunteer, Student; Maine-Delepierre, Sandi

View All Contacts **Items** 25 **Search** Quick find...

4 total record(s) found.

	<input type="checkbox"/>	Name	Campus	Email
1	<input checked="" type="checkbox"/>	Maine-Delepierre, Sandi	UW-Green Bay	maines@uwgb.edu
2	<input checked="" type="checkbox"/>	Schevers, Patti	UW-Green Bay	scheverp@uwgb.edu
3	<input checked="" type="checkbox"/>	Schultz, Abby	UW-Green Bay	schultza@uwgb.edu
4	<input checked="" type="checkbox"/>	Volunteer, Student	UW-Green Bay	stcamps@uwgb.edu

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"

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	<p>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.</p> <p>Secondly, if your volunteer is not listed, move to the <i>Add Volunteers Not in Contact Database</i> step below.</p> <ul style="list-style-type: none">Then click the "Choose" button to return to the Project Invitation page where they will be added to the "Volunteer Recipients" list. <div data-bbox="480 491 750 579"><input type="button" value="Close"/> <input type="button" value="Choose"/></div>
Additional Email Recipients	<p>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.</p> <div data-bbox="435 678 1053 884"><p>Additional Email Recipients</p><p>Use commas to separate a list of email addresses</p><input type="text" value="pionteks@uwgb.edu, vaneremt@uwgb.edu"/></div>
Subject	<p>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.</p> <div data-bbox="435 1005 1175 1146"><p>Subject</p><input type="text" value="Volunteer Project Invitation - March 30, 2024 Einstein Camp"/><p>Enter the subject for the email. Leave this blank to use the default.</p></div> <p>This will update the "Project Invitation Email Preview" on the right with your custom subject.</p>
Special Invitation Message	<p>You can use the default Project Invitation message or craft one of your own. Similar to an email, enter the email message you wish the volunteer to see, otherwise the default messaging will appear when you hit SEND.</p> <p>Default Message</p> <div data-bbox="435 1415 1398 1759"><p>Project Invitation Email Preview</p><p>Subject: We need your help!</p><hr/><p>Dear <u>Sandra</u>,</p><p>By volunteering through <u>Universities of Wisconsin</u>, you'll improve our community, make new friends, and feel the satisfaction of knowing that you've made a real impact.</p><p>Here is an upcoming fun and rewarding volunteer project.</p><p>Volunteer Project: <u>Test Camp 2024 #1</u></p><p>Project Description: <u>This is a test camp for UWGB to test the VM System. Learn More</u></p><p>Sincerely,</p><p><u>Universities of Wisconsin</u></p></div> <p>Special Invitation Message</p> <p>I hope this message finds you well. We are excited to announce an opportunity for you to make a meaningful impact and become a part of our volunteer team. We believe that your skills and enthusiasm would be a valuable addition.</p>

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We would ask that you visit the project page linked below and click "Volunteer" as an Authorized volunteer. (OR WHATEVER POSITION IS REQUIRED)

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.

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).

We believe that together, we can make a significant difference in our community. Your involvement and commitment are highly appreciated, and we look forward to working with you.

4. 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.

Send Me Email Results ←

Update Preview Send

5. Update Preview

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

Volunteer Recipients

Choose Volunteers

Cook, Kelly; Clifton, Prenicia

Additional Email Recipients

Use commas to separate a list of email addresses

jane.smith@uw.edu; john.smith@uw.edu

Subject

We would love for you to register as a UW Stout Volunteer!

Enter the subject for the email. Leave this blank to use the default.

Project Invitation Email Preview

Subject: We would love for you to register as a UW Stout Volunteer!

Dear Glen,

By volunteering through University of Wisconsin, you'll improve our community, make new friends, and feel the satisfaction of knowing that you've made a real impact.

Here is an upcoming fun and rewarding volunteer project.

Volunteer Project: UW Stout: Volunteer Onboarding

Project Description: We are thrilled to have you join our team of dedicated volunteers, committed to making a positive impact on our community. Your participation is invaluable to us, and we are exc...

6. Send

Click on SEND once your message is complete and you are satisfied with the results.

Update Preview Send

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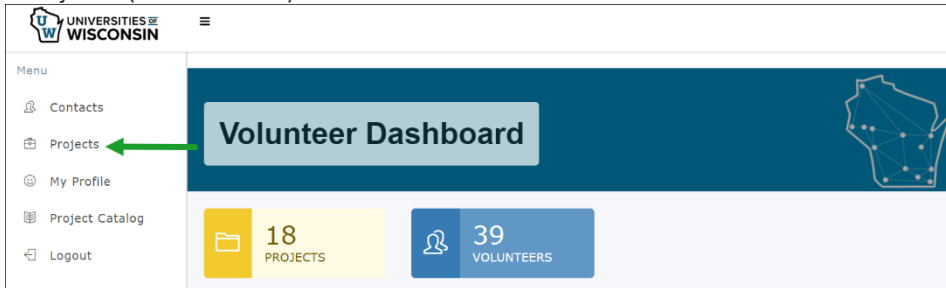
Youth Compliance

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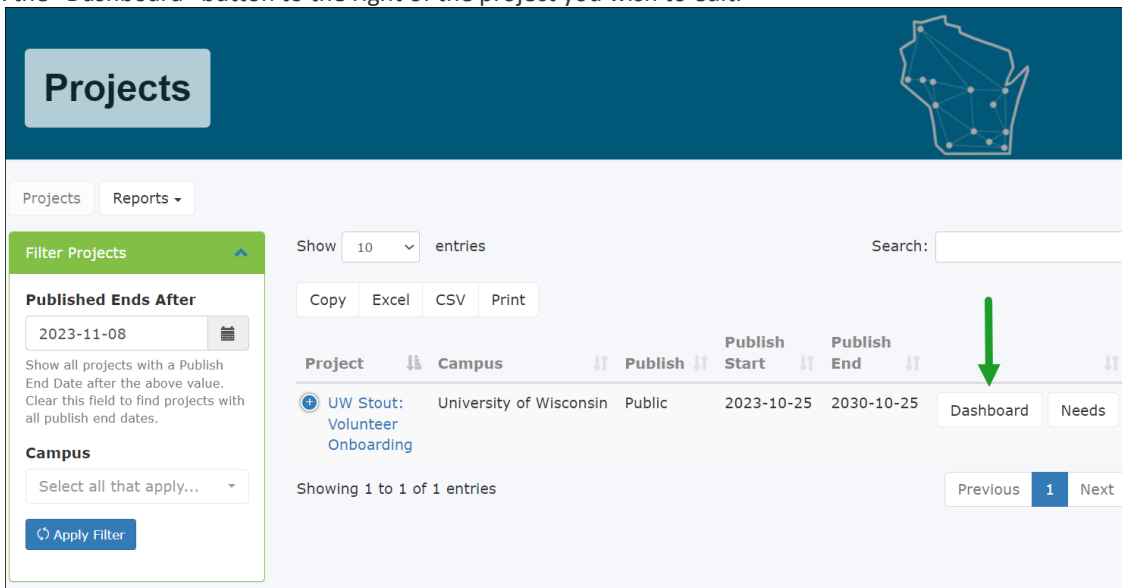
Update Project Set Up

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.

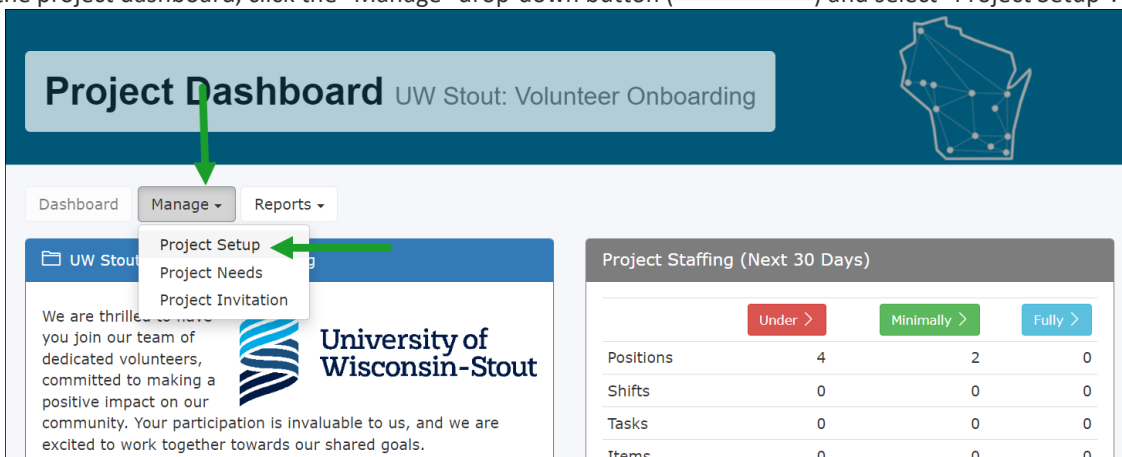
1. Click "Projects" (Briefcase Icon) from the main menu.



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 () and select "Project Setup".

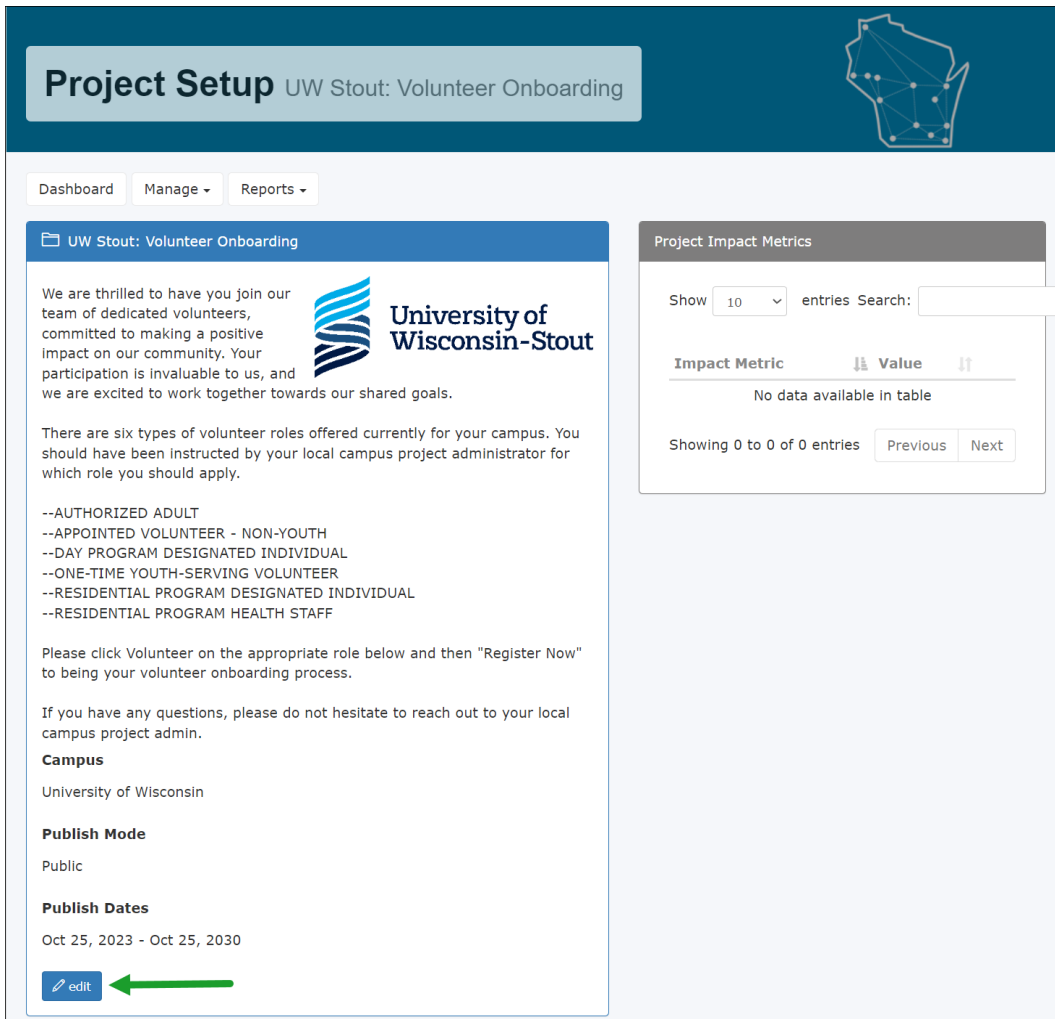


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4. Click the "Edit" button () under the project summary panel.



Project Setup UW Stout: Volunteer Onboarding

Dashboard Manage Reports

UW Stout: Volunteer Onboarding

We are thrilled to have you join our team of dedicated volunteers, committed to making a positive impact on our community. Your participation is invaluable to us, and we are excited to work together towards our shared goals.

There are six types of volunteer roles offered currently for your campus. You should have been instructed by your local campus project administrator for which role you should apply.

- AUTHORIZED ADULT
- APPOINTED VOLUNTEER - NON-YOUTH
- DAY PROGRAM DESIGNATED INDIVIDUAL
- ONE-TIME YOUTH-SERVING VOLUNTEER
- RESIDENTIAL PROGRAM DESIGNATED INDIVIDUAL
- RESIDENTIAL PROGRAM HEALTH STAFF

Please click Volunteer on the appropriate role below and then "Register Now" to begin your volunteer onboarding process.

If you have any questions, please do not hesitate to reach out to your local campus project admin.

Campus
University of Wisconsin

Publish Mode
Public

Publish Dates
Oct 25, 2023 - Oct 25, 2030

[edit](#)

Project Impact Metrics

Show 10 entries Search:

Impact Metric	Value
No data available in table	

Showing 0 to 0 of 0 entries Previous Next

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.





Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

Update 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 

Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

Monitor Volunteer Assignments

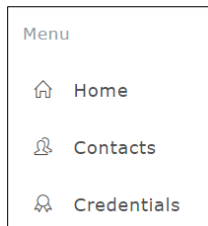
Once project is set up and volunteer invitations sent, the Program Director will need to manage the volunteer credential assignments – or their assigned screening and training process to ensure the volunteer has completed all the requirements prior to a covered activity date. You may utilize the Credential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

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.

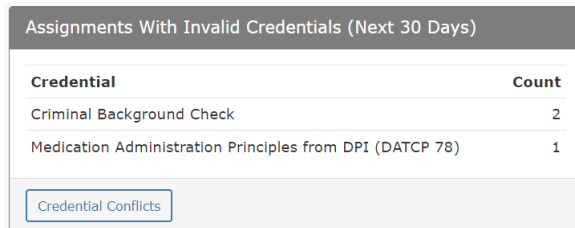
CBC Support Contact: [Angela Schultz](mailto:Angela.Schultz@uwss.wisconsinson.edu)
[Angela.schultz@uwss.wisconsinson.edu](mailto:Angela.Schultz@uwss.wisconsinson.edu)

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

1. Open Menu: Credentials



2. Scroll to Credential Conflicts

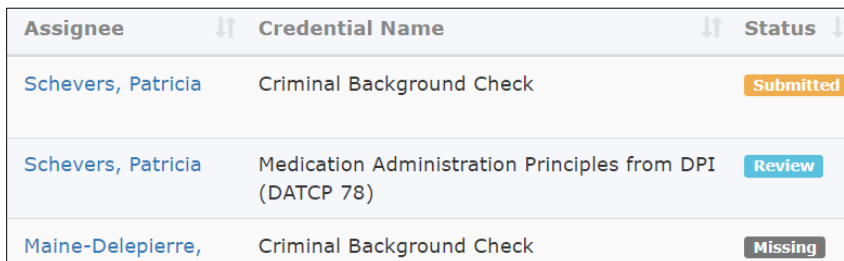


A screenshot of a table titled "Assignments With Invalid Credentials (Next 30 Days)". The table has two columns: "Credential" and "Count".

Credential	Count
Criminal Background Check	2
Medication Administration Principles from DPI (DATCP 78)	1

Below the table is a button labeled "Credential Conflicts".

3. Review the Status



A screenshot of a table showing volunteer assignments. The table has three columns: "Assignee", "Credential Name", and "Status".

Assignee	Credential Name	Status
Schevers, Patricia	Criminal Background Check	Submitted
Schevers, Patricia	Medication Administration Principles from DPI (DATCP 78)	Review
Maine-Delepierre,	Criminal Background Check	Missing

Most review items will only need your review to accept and change the status (e.g. verify the CPR Certificate).

CBC: for overnight activities, you will want to change the expiration date for 2 years (default is 4). Refer to *Change CBC Expiration* in next section.

4. Change Status to Approved
Approve those credentials where review is required, ie. CPR Certificate uploaded; review certificate to ensure the document is an actual CPR Certificate, if so, change status to Approved.
 - Click on EDIT on credential for volunteer name

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- Scroll to Credential
- Change to Approved and Save
- Include a note as to why it was Approved

CPR Certification: 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

5. Reach out to volunteers as needed

Refer to *Manage CBC Section* for issues relating to volunteers who do not access HireRite within the 5-day period. This will require additional steps to re-initiate the invitation.

Status Codes noted below:

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. This type of credential conflict should only exist for very little time as upon adjudication to a Denied state, the Credential 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.	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.

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Status	Description	Additional Actions Needed
	<p>The volunteer was not approved but instead is exempt from the requirement.</p> <p>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.</p>	<p>Review notes to assure policies for exemptions have been followed</p>
Expired	<p>The credential was either automatically expired by rule or by manually by an administrator.</p>	<p>The volunteer will need to re-complete the credential once they are assigned the credential again for a new covered activity.</p>
Incomplete	<p>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. Only to be used for integrated Learning credentials, legacy integrated background check credentials, and/or those credentials requiring a file upload.</p>	<p>When editing the credential status, set the "Waiting for File Upload" setting to True. Also enter notes describing the reason for the incompleteness. 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.</p>
Missing	<p>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.</p>	<p>The volunteer should be instructed to login to the system and sign the credential and complete any action needed.</p> <p>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.</p>
Review	<p>Waiting on the organization's review to decide approval.</p>	<p>Project Director will need to open the credential and either approve it or contact volunteer.</p>
Submitted	<p>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.</p> <p>Example: CBC submitted to HireRite.</p>	<p>Someone from the 3rd party system must review the request prior to VolunteerMatters changing the status.</p> <p>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.</p>

Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

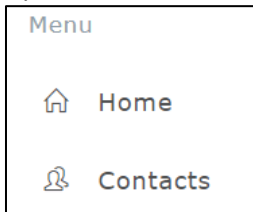
Change CBC Expiration

Due to the difference between day camps and residential overnight camp requirements for duration of CBCs, you will need to manually change an expiration date once a CBC is complete for volunteers who are serving at an overnight camp activity.

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*.

Track overnight camp activities to ensure the CBC expiration dates are updated for these staff.

1. **Open Contacts**



2. Scroll to specific volunteer

3. Click on their name to open their profile

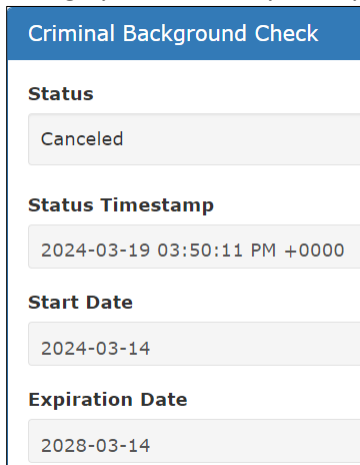
4. Scroll to *Credentials* section (bottom right)

5. Click on *Criminal Background Check* Credential box to open



6. Click in Expiration Date field

7. Change year to a two-year expiration (default is 4)



Standard Operating Procedure: Volunteer Matters

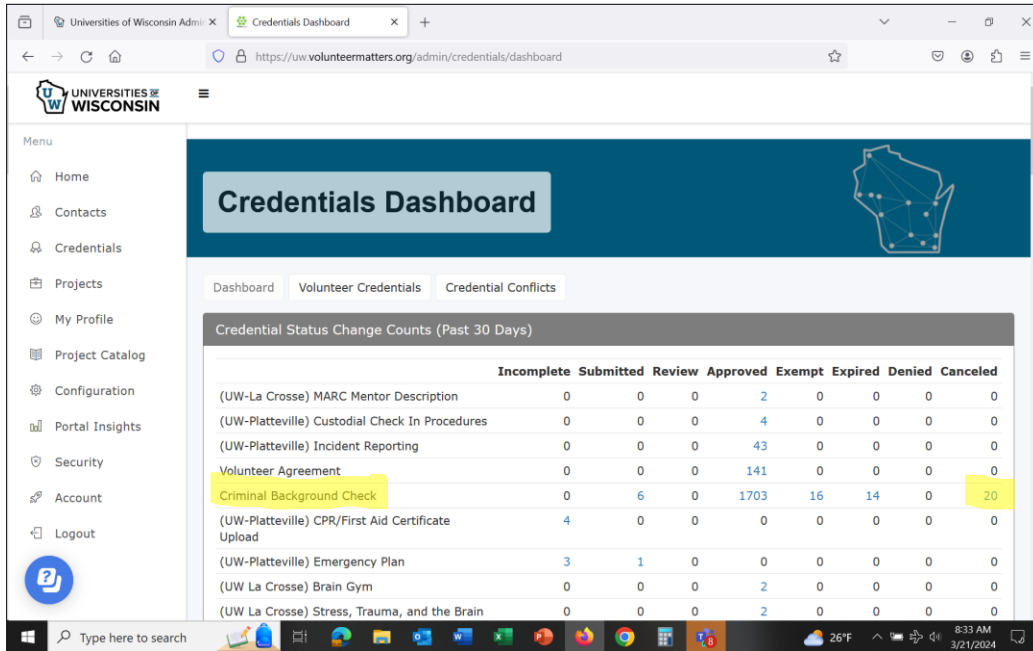
Youth Compliance

As of 2/07/2024

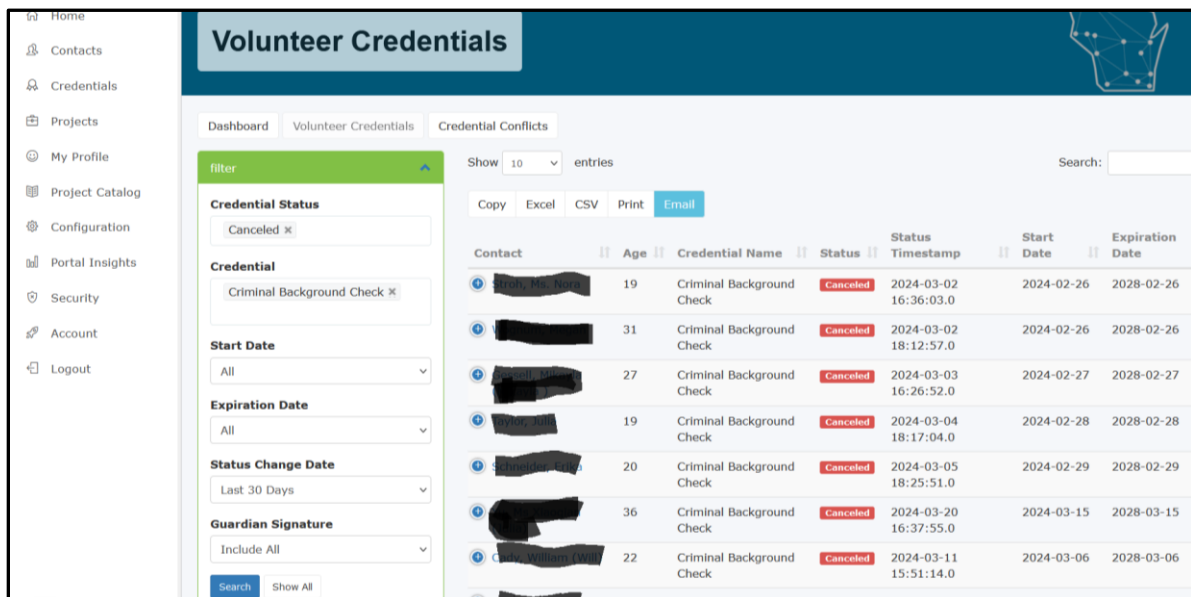
Reset CBC within HireRite

Managing “Canceled” Criminal Background Checks

- 1) The VolunteerMatters Campus Administrators should be monitoring the Credentials Dashboard for “Canceled” criminal background checks at least twice a week. The “canceled” status means the volunteers did not respond to the HireRight invitation to initiate the background check process within the 5-day window. The HireRight invitation has expired.



- 2) Details for these individuals are available by clicking on the dashboard hyperlink.



Standard Operating Procedure: Volunteer Matters

Youth Compliance

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- Another HireRight invitation will need to be resent to the volunteer from HireRight. If you, as a VolunteerMatters Campus Admin, do not have access to HireRight, you will need to coordinate with your campus representative(s) with HireRight access to have the invitation resent to the volunteer via HireRight. (The campus representative needs at least the HireRight “View All and Order” or “View Status Only and Order” role.)

After the invite is resent, the volunteer will have 5 days to respond. The campus representative with HireRight access will need to monitor the status **in HireRight** (not VolunteerMatters) and inform the VolunteerMatters Campus Admin of the status. (Note, if the volunteer does not act on the resent invite within 5 days, it will expire again and will need to be resent from within HireRight.)

- Upon completion of the background check in HireRight, the VolunteerMatters Campus Admin will go into VolunteerMatters to manually update the Criminal Background Check Credential by clicking on the volunteer’s Canceled Background Check Credential.

Contact Detail Tester, Sam

Edit Send a Note

Basic Information

Name: Sam Tester

Birth Date: 1979-02-22 (Age 45)

Email: tester@tds.net

Contact Since: 2024-02-14

Campus: UW-Eau Claire

University of Wisconsin Volunteer History: No

Discipline Actions: No

Discipline Actions Descriptions:

Contact Status

Contact ID:

Volunteer History Totals

1 PROJECTS

1 ASSIGNMENTS

0 HOURS

Volunteer History

Current Assignments

Project: UW Eau Claire Basketball Camp
Position: Shooting Coach
When: Feb 14, 2024

Credentials

Volunteer Agreement
Status: Approved
Start: 2024-02-29
Expires:

Criminal Background Check
Status: Canceled
Start: 2024-02-14
Expiration: 2028-02-14

- Click the Edit button.

Volunteer Credential

Criminal Background Check

Status: Canceled

Status Timestamp: 2024-02-14 07:32:56 PM +0000

Issued By: HireRight

Start Date: 2024-02-14

Expiration Date: 2028-02-14

External Integration Data

Cancel Edit

Volunteer

Name: Tester, Sam

Age: 45

Detail

Credential

Type: Background Check

External Integration: true

Code: @B9AC0JATmKegV5uN1MgJw

Standard Operating Procedure: Volunteer Matters

Youth Compliance

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- 6) 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.

(Updating a CBC credential status to “Exempt” with an expiration date means that volunteer will be prompted to apply for another CBC on that expiration date. It does not mean the volunteer is permanently exempt from ever needing a background check. If you have a contact record in VolunteerMatters that is fully exempt from ever needing a CBC (for example, a campus staff member never volunteering with youth), you can remove any expiration date and leave blank.)

Volunteer Credential

Criminal Background Check

Status: Exempt

Expiration Date: 2024-03-18

Admin Notes: CBC completed 3/18/24

Buttons: Cancel, Save

Volunteer

Name: [Redacted]

Age: [Redacted]

Buttons: Detail

Credential

Type: Background Check

External Integration: true

Code: e89AC0A1TmKegVSuN1MgIw

NOTE – if the CBC comes back as “not meeting company standards,” leave the status as “canceled,” remove any expiration date (leave blank), and include description of status in the “Admin Notes” field. Also update the status to “Banned” in the volunteer’s contact information.

Basic Information

Name: Prefix (Mr., Ms., Dr., etc.)

First: Joe

Middle:

Last: Tester

Contact Status

Contact ID: m5m4RZAWTwiOB6XcDntiRg

Status: Active

Options: Active, Banned, Exit, Hold, Staff

Contact Status

Contact ID: m5m4RZAWTwiOB6XcDntiRg

Status: Banned

Status Date: 2024-03-14

Escalation/Incident Notes: CBC did not meet company standards, 3/1/24

When selecting “Banned” from the dropdown, an incident notes field appears.

Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

Use 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](#)

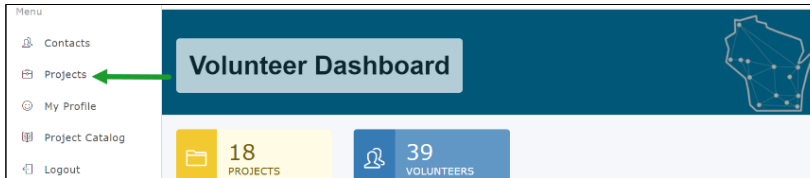
Assignment Roster Report

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.

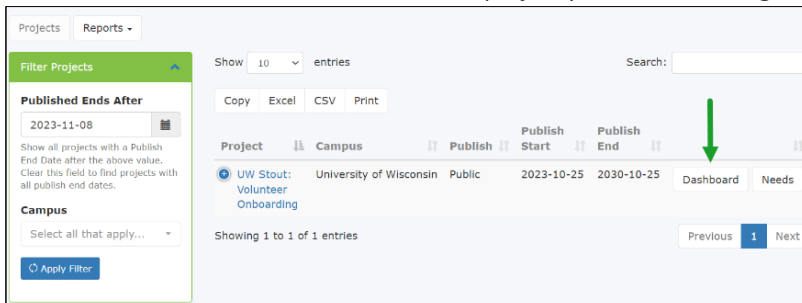
The report includes a number of fields pertinent to the assignment such as need name, credentials, age, etc..

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.

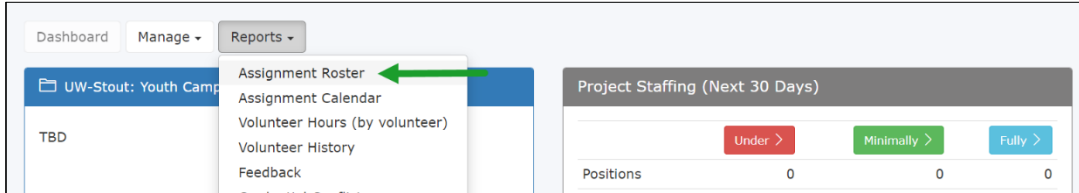


Standard Operating Procedure: Volunteer Matters

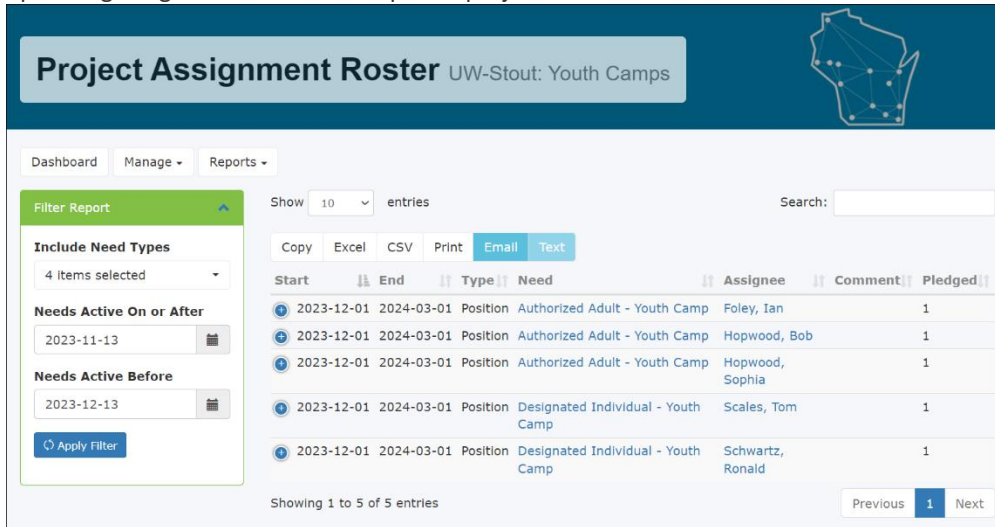
Youth Compliance

As of 2/07/2024

- 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.

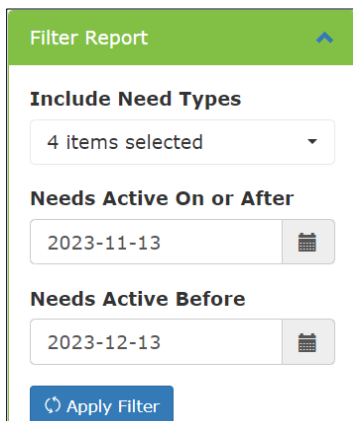


It will display the main report fields along with any additional contact information configured by VolunteerMatters support for your organization. You can toggle the + sign to expand the information for each assignment.

- 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.

Standard Operating Procedure: Volunteer Matters

Youth Compliance

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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.

Project Assignment Roster UW-Stout: Youth Camps

Dashboard Manage Reports

Filter Report

Include Need Types
4 items selected

Needs Active On or After
2023-11-13

Needs Active Before
2023-12-13

Apply Filter

Show 10 entries

Copy Excel CSV Print **Email** Text

Start	End	Type	Need	Assignee	Comment	Pledged
2023-12-01	2024-03-01	Position	Authorized Adult - Youth Camp	Foley, Ian		1
2023-12-01	2024-03-01	Position	Authorized Adult - Youth Camp	Hopwood, Bob		1
2023-12-01	2024-03-01	Position	Authorized Adult - Youth Camp	Hopwood, Sophia		1
2023-12-01	2024-03-01	Position	Designated Individual - Youth Camp	Scales, Tom		1
2023-12-01	2024-03-01	Position	Designated Individual - Youth Camp	Schwartz, Ronald		1

Showing 1 to 5 of 5 entries

Previous 1 Next

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.

Email Volunteers

< Roster Report

5 Contacts

Subject
Special Event Subject Update - Important!

Enter the subject for the email.

Special Message

Here is my special message. You will need to meet prior to your assignment with your project managers.

Enter a special message to be included with the email.

Send Me Email Results

Update Preview **Send**

Email Preview

Subject: Special Event Subject Update - Important!

Dear Program,

Here is my special message. You will need to meet prior to your assignment with your project managers.

Sincerely,
University of Wisconsin

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.

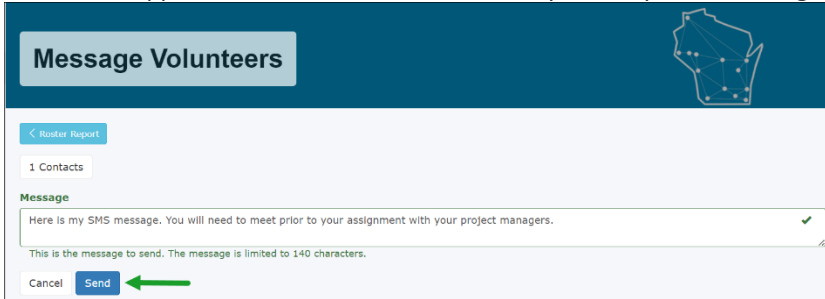
Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

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.

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Youth Compliance

As of 2/07/2024

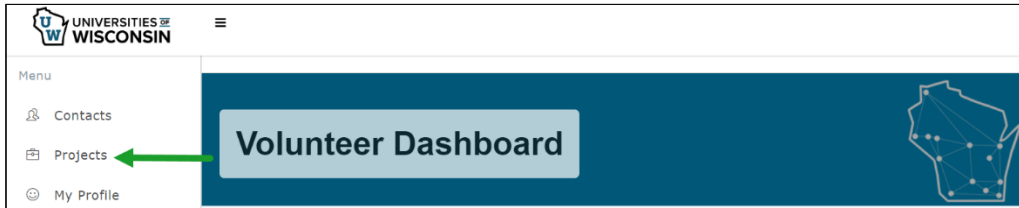
Credential Conflict Report

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.

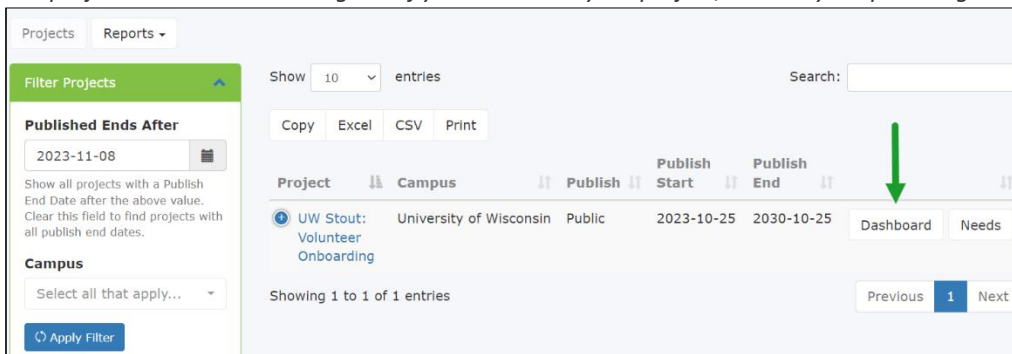
For assistance with understanding the Credential Conflict Reporting, see also <https://support.volunteermatters.com/hc/en-us/articles/360011324053>.

To run the report:

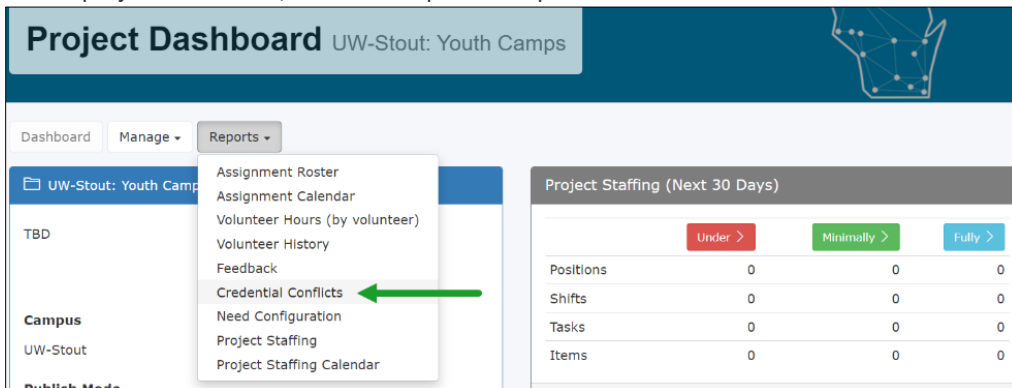
1. Click "Projects" (Briefcase Icon) from the main menu.



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.

Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

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 AM	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
<p>Approved: i.e., electronically signed agreements.</p> <p>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.</p> <p>Review: means someone from the organization must review the application prior to giving it a new status.</p>	<p>Review: waiting on the organization's review to decide approval.</p> <p>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.</p> <p>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.</p>	<p>Approved: Volunteer can proceed with any activity. May automatically change from this status if there is an expiration policy.</p> <p>Denied: After review by an administrator they declined the award of this credential.</p> <p>Expired: The credential was either automatically expired by rule or by manually by an administrator.</p> <p>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.</p> <p>Canceled: An administrator outside service marked the credential canceled manually.</p>

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).

The screenshot shows the 'Project Credential Conflicts' interface for 'UW-Stout: Youth Camps'. At the top, there are navigation tabs for 'Dashboard', 'Manage', and 'Reports'. Below these, there is a 'Show 10 entries' dropdown and a search box. A row of action buttons includes 'Copy', 'Excel', 'CSV', 'Print', and 'Email', with a green arrow pointing to the 'Email' button. Below the buttons is a table with columns for 'Need Type', 'Need', 'Need Start', 'Assignee', 'Credential Name', and 'Status'. The table contains two rows of data, both with 'Missing' status.

Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

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.

Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

Reference: Contact Database Functions

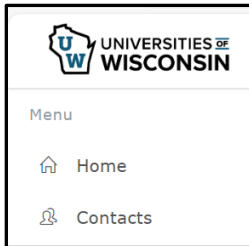
Manage the Contact Database using the [VM Database PDF](#) or instructions below.

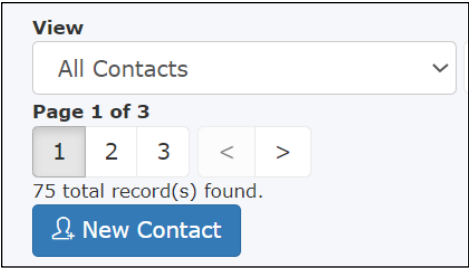
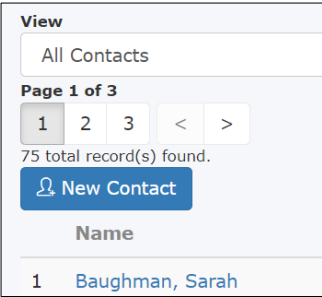
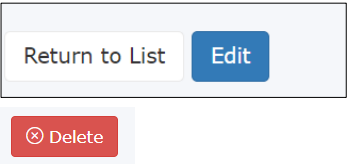
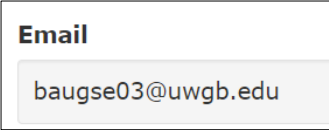
All Administrators and Project Organizers should have their *Contact Status* changed to Campus Staff. To do so, edit the Contact record and update the Status field.

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



Add New Contact	Update Existing Contact
<p>a. Select New Contact</p>  <p>b. Add Minimum Details To set up user contact profile; user may update their profile once they login. <i>Name:</i> First and Last <i>Email</i> <i>Campus</i> (UW-Green Bay) <i>Status Date</i> (will automatically enter today's date once you click in the box)</p> <p>c. Save</p>	<p>a. Click on existing user name</p>  <p>b. Scroll to bottom to select Edit</p>  <p>May also select Delete to remove user</p> <p>c. Change details as needed</p>  <p>d. Save</p>

Standard Operating Procedure: Volunteer Matters

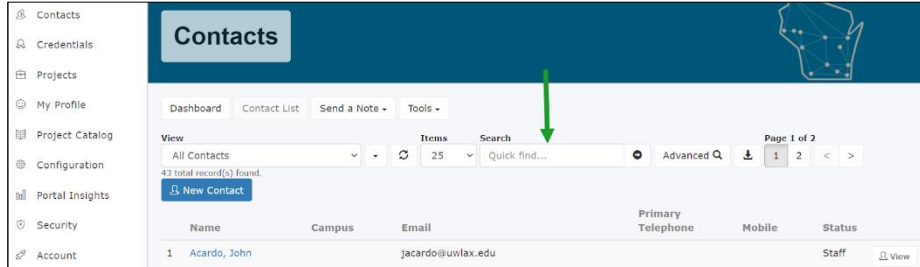
Youth Compliance

As of 2/07/2024

Using Contact Database

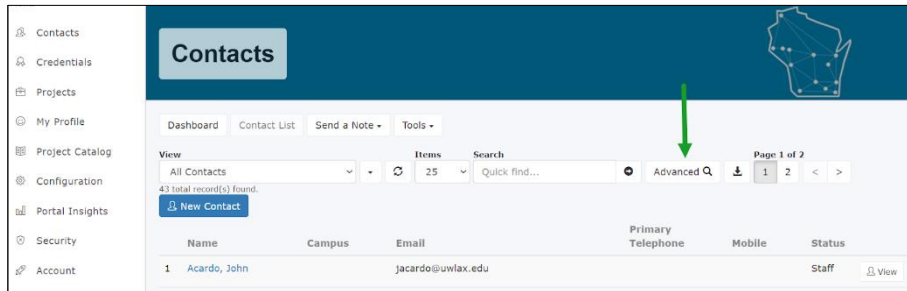
Quick Find

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:

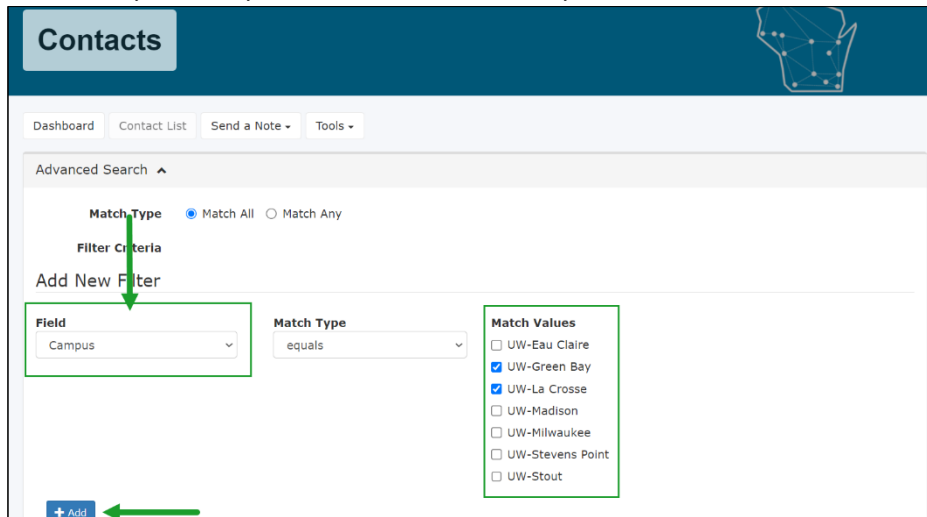


Advanced Search

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.

Standard Operating Procedure: Volunteer Matters

Youth Compliance

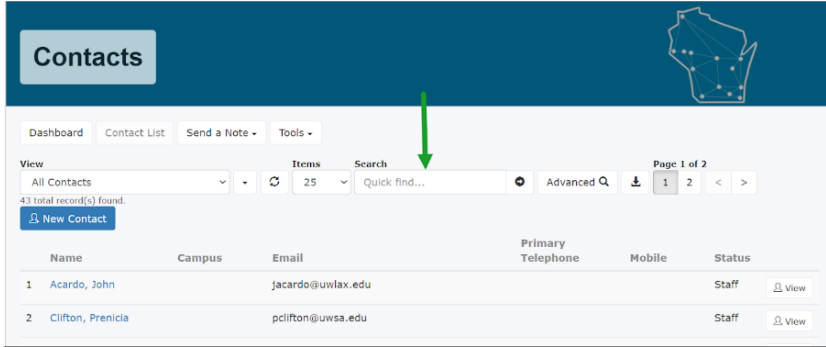
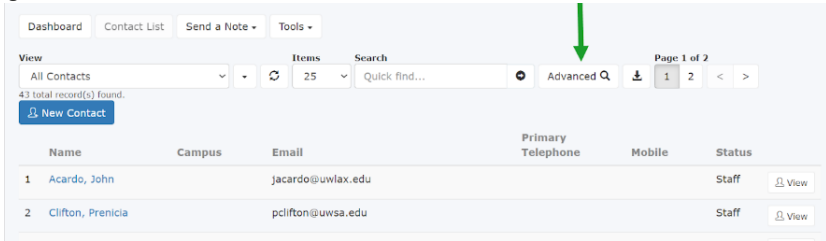
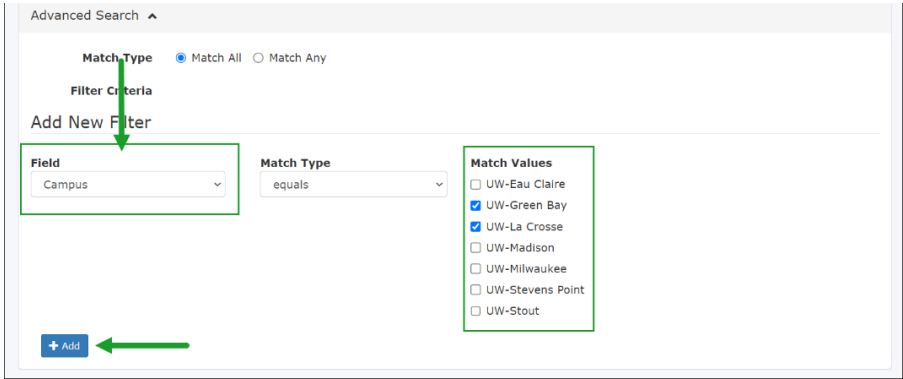
As of 2/07/2024

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

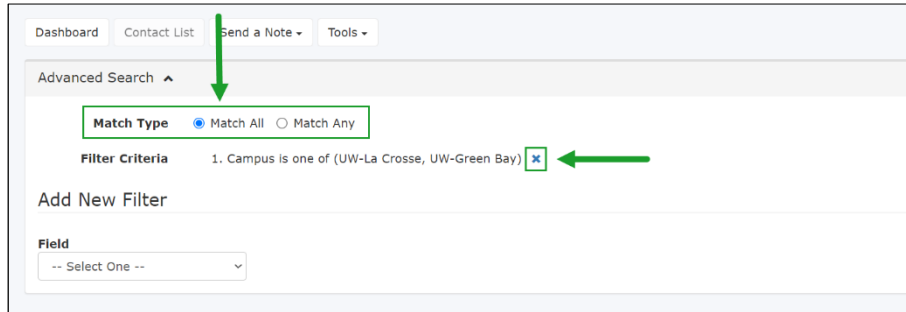
<p>Quick Find</p>	<p>The "Search" field allows you to "Quick Find" contacts by entering any text into the box to search the default quick find fields. These fields include Name, Email, and Organization. Please see the image below for the Search button:</p> 
<p>Advanced Search</p>	<p>The "Advanced Search" allows you to fully filter records "on the fly", essentially creating a temporary list view. Please see the image below for the button location</p>  <p>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.</p> 

Standard Operating Procedure: Volunteer Matters

Youth Compliance

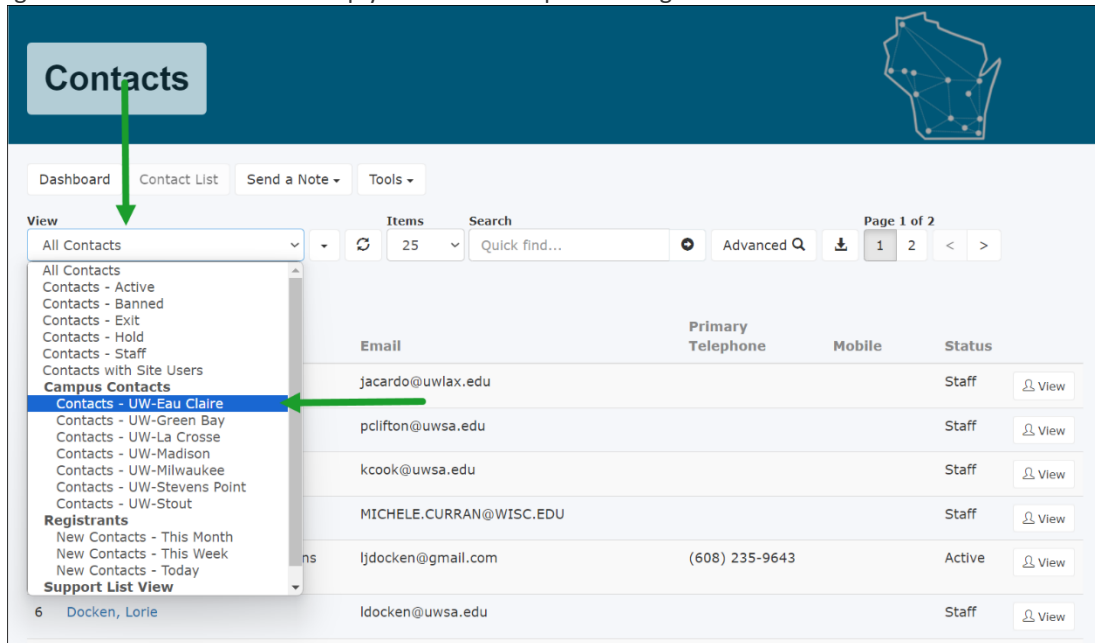
As of 2/07/2024

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).

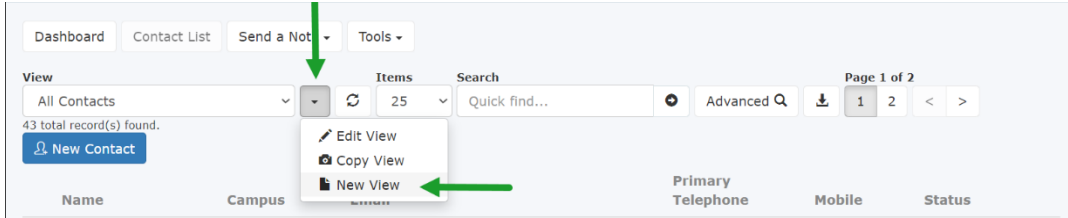
1. Log into your VolunteerMatters system with the Contact Administrator role.
2. Navigate to the Contacts page.

Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

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



- 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).

The screenshot shows the 'List View Configuration' form. It has four main sections: 'Name' with a text input field containing 'List View Name'; 'Group Name' with a text input field containing 'List View Group Name'; 'Description' with a large text area containing 'List View Description|' and a note below it stating 'The description is limited to 255 characters.'; and 'Visibility' with two radio buttons: 'shared' (unselected) and 'private' (selected).

- 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.

The screenshot shows the 'List Filter' configuration screen. At the top, there are 'Visibility' radio buttons for 'shared' (selected) and 'private'. Below this, the text 'List Filter' is followed by an 'Edit' button with a pencil icon. A green arrow points to the 'Edit' button. To the right, there is a list of filter criteria: '1. Contact Standing is one of (ACTIVE)'. The text 'all of the following are true:' is partially visible above the list.

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

The screenshot shows the 'List Filter' configuration screen. Under 'Match Type', 'Match All' is selected. Under 'Filter Criteria', there is one entry: '1. Campus is one of (UW-Eau Claire)'. A blue 'X' icon is next to this entry, and a green arrow points to it, indicating it should be removed.

- 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".

The screenshot shows the 'List Filter' configuration screen in 'Add New Filter' mode. It has 'Match Type' set to 'Match All'. Under 'Filter Criteria', there is a section for adding a new filter. It includes a 'Field' dropdown set to 'Status', a 'Match Type' dropdown set to 'equals', and a 'Status' section with checkboxes for 'Active', 'Banned' (checked), 'Exit', 'Felony Hold', and 'Hold'. A green arrow points to the '+ Add' button at the bottom.

- 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.

Standard Operating Procedure: Volunteer Matters

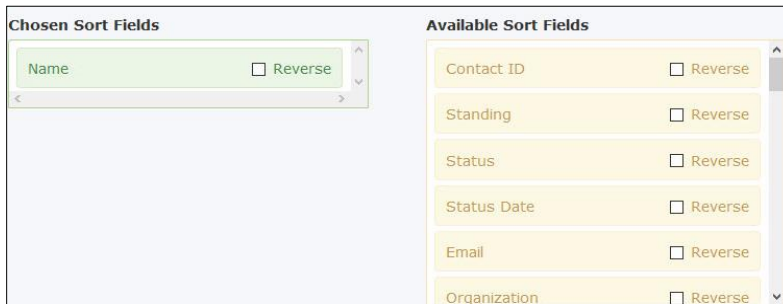
Youth Compliance

As of 2/07/2024

- 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.




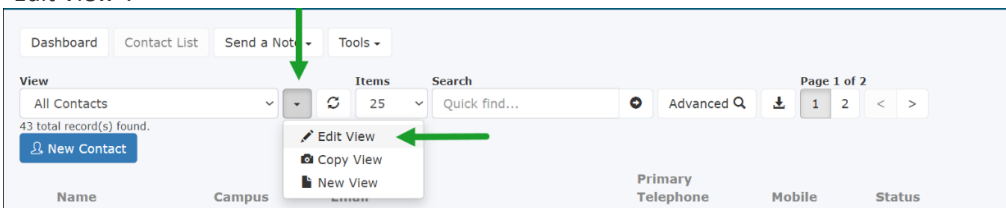
- Choose the sort order (which is usually "Name") by dragging additional fields from the "Available Sort Fields" group to the "Chosen Sort Fields" group and vice versa to remove columns/fields. The field listed first will be the first field sorted by and then down the line if multiple sort fields are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



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

Edit List Views

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



- 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".


Standard Operating Procedure: Volunteer Matters

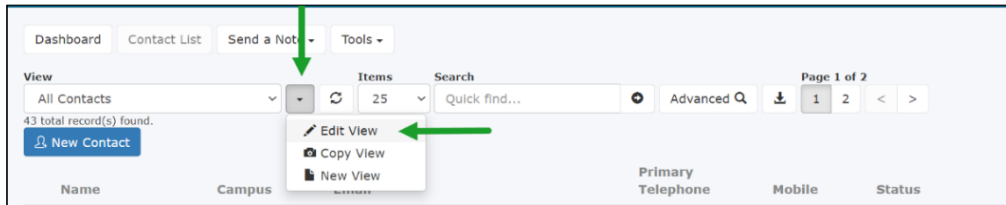
Youth Compliance

As of 2/07/2024

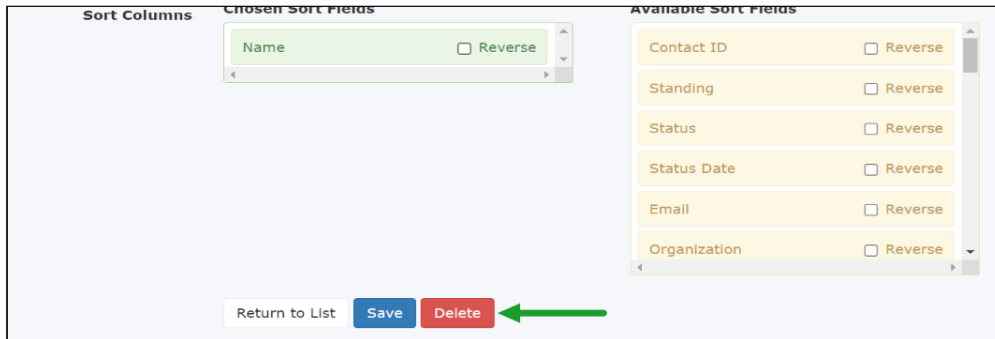
- To edit the filter, click 'edit' on the List Filter and then delete and/or add criteria by clicking the X's or selecting from the drop-down what you would like to filter by and enter the criteria and click "Add". Then click "Save" and then "Return to List". Please see the article ["Working with filters."](#) for more information.
- 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.
- 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.
- Click "Save" and then "Return to List".

Delete List Views

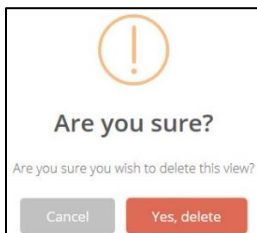
- Log into your VolunteerMatters system with the Contact Administrator role.
- Navigate to the Contacts page.
- Select the list for which you wish to delete as the current list view.
- Once loaded, click on the "v" button () next to the drop-down list to expand the options and then click "Edit View".



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



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




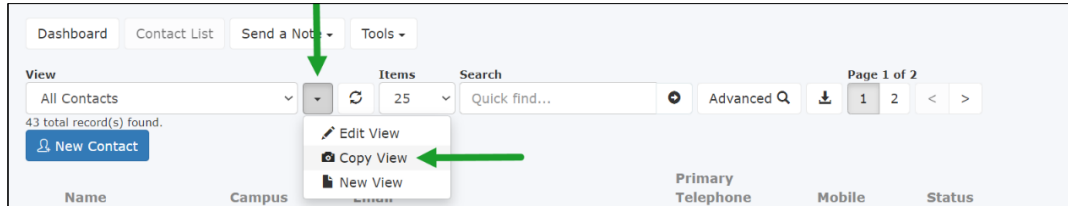
Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

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.](#)

Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

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-tlY13-SAYw2zLPpBxHo/edit?usp=sharing
- VolunteerMatters Precollege Liaison - Adding Organizers to a Contact and Assigning Organizers to Projects: <https://docs.google.com/document/d/1Y-SKEyFu6X6ltbbW0LZYigRvG7kmSo57alwZoUwAlqQ/edit?usp=sharing>
- VolunteerMatters Precollege Liaison - Project
Creation: <https://docs.google.com/document/d/115CSnwolmi7cZYJnwIV-k0kwRZX6ALWcUJ9kUuUvVhl/edit?usp=sharing>
- VolunteerMatters Precollege Liaison - Risk Management Guide (Credential Administration, Policy Auditing, Standard Risk Profiles) https://docs.google.com/document/d/1APOC7kPnye-Zppf4YlgLMQq7TinPm1ybVWpo_RNNLwl/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/10qB8Nx6B0IURqsn3rnFtOBARdy4Zcfl3lqgIIR42p4/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/1jndBo1pGDdblh4ir3bq0mG-IWNXyRmVUCkbGN9v2W5k/edit?usp=sharing>
- VolunteerMatters Program Organizer - Contact Database: https://docs.google.com/document/d/1gEByup5GR_8d8bqXeRogdxAHLdlvcwMzX1VdTkeGic/edit?usp=sharing

Standard Operating Procedure: Volunteer Matters

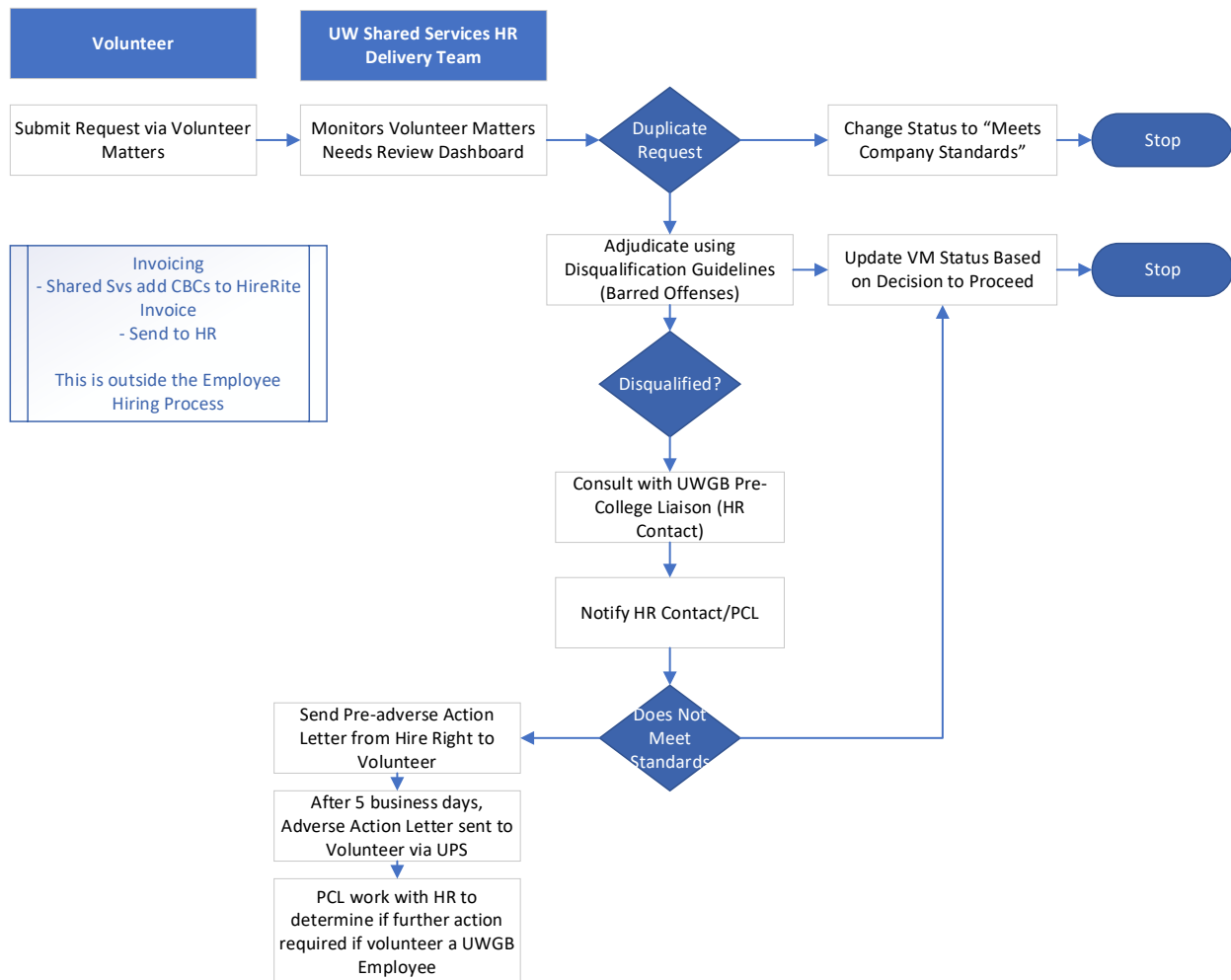
Youth Compliance

As of 2/07/2024

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 5 days to utilize the link to complete a criminal background check, otherwise the access will expire.



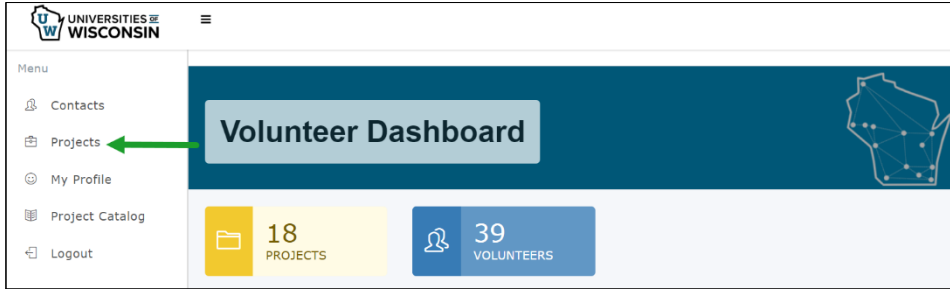
Reminder: update CBC expiration to two (2) years if volunteer serving at an overnight program activity.

Standard Operating Procedure: Volunteer Matters Youth Compliance As of 2/07/2024

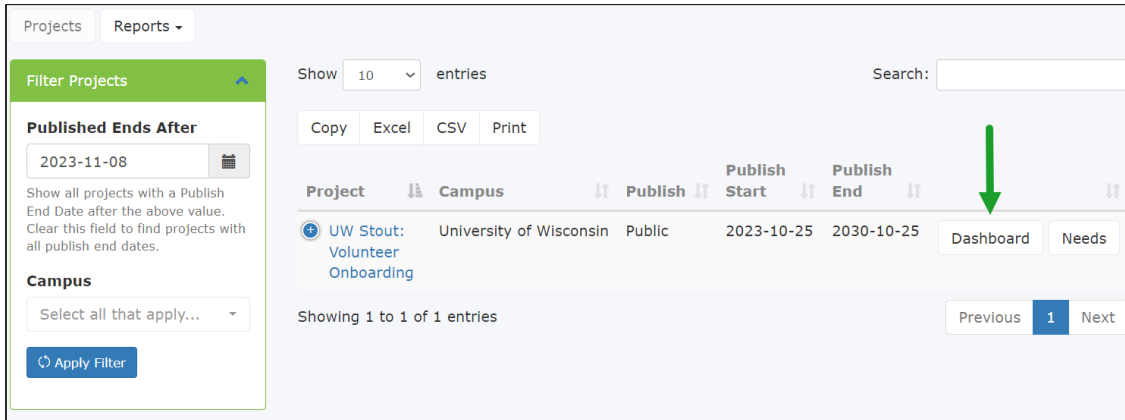
Reference: Project Catalog

The Project Catalog can be viewed from the Project Dashboard.

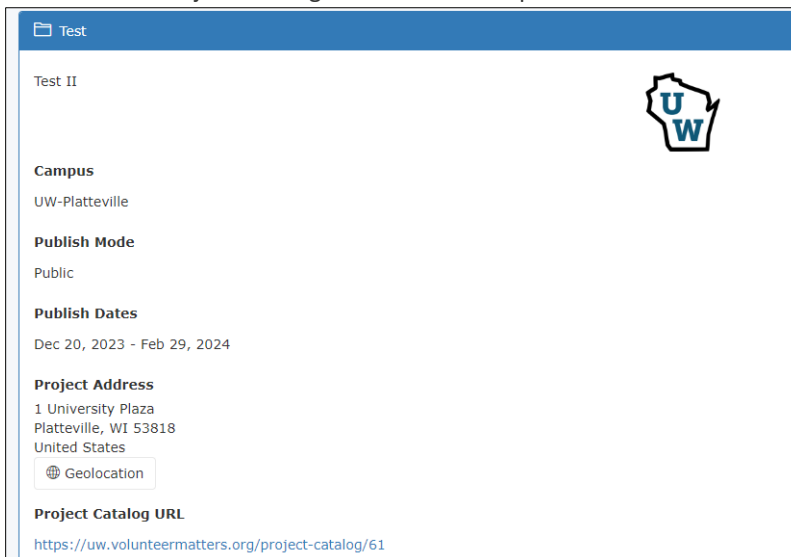
1. Click "Projects" (Briefcase Icon) from the main menu.



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.



Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

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 do the following:

- **View your Volunteer Dashboard for assigned activities**
- **Update your Profile**
- **Find a Volunteer Opportunity – or “Project”**

Create Login Registration Profile

[Registration Portal](#)

The screenshot shows a registration form titled "Create Your Login Information". It has three main sections: "Email", "Username", and "Password". Each section has a text input field and a small instruction below it. The "Email" section says "Please provide the email address you wish to associate with your account." The "Username" section says "Please enter your desired username." The "Password" section has no text below the input field.

Fill out the required information. Upon registration, users will receive email confirmations for registration.

Thereafter, you will login to [Volunteer Matters Login](#) to complete any assigned activities, locate a volunteer opportunity, or update your volunteer profile.

Public User Login

UW Employee Portal

The screenshot shows the login portal for the Universities of Wisconsin. At the top is the logo "UNIVERSITIES OF WISCONSIN". Below the logo is the text "SIGN IN TO CONTINUE.". There are two input fields: "Enter username" and "Password". Below these is a checkbox labeled "Keep Me Logged In". To the right of the checkbox are two links: "Forgot your username?" and "Forgot your password?". Below these links is a blue button labeled "Login". Below the "Login" button is another blue button labeled "Login for UW Employees and Students". At the bottom, there is a link "Need an account?" and a button labeled "Register Now".

Standard Operating Procedure: Volunteer Matters

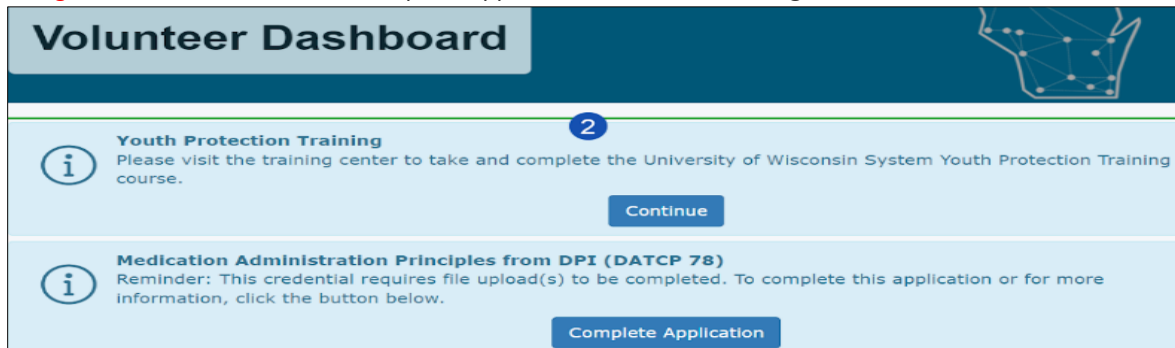
Youth Compliance

As of 2/07/2024

Monitor 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.



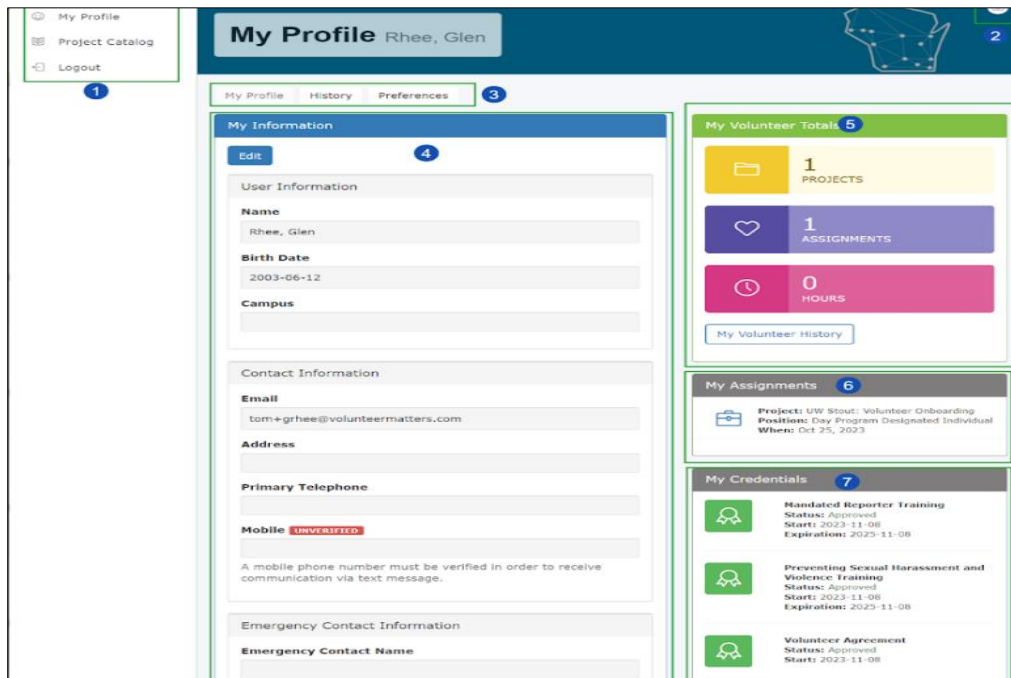
You will also be able to view any announcements or search for other volunteer opportunities.

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 2/07/2024

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
<ul style="list-style-type: none">Open the Project PageSelect the Campus you are interested inLocate a project and select <i>Learn More</i>Click the Volunteer button on the onboarding position; if you see “fulfilled” that position is not available The Need Sign-Up page will openComplete credentials required <p>You MUST complete the credentials before the system will sign you up for a project.</p>	<ul style="list-style-type: none">Open invitation sent by Program OrganizerClick the Volunteer button on the onboarding positionThe Need Sign-Up page will openComplete credentials required <p>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.</p>

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



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

Standard Operating Procedure: Volunteer Matters

Youth Compliance

As of 2/07/2024

Reference: Volunteer Training

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	Completion	Camp Director	Health Supervisor	Volunteer	Volunteer Exception
CBC	HireRite	X	X	X	
CPR Certificate	Upload	X	X	Supervisor Reqd	
Driver Authorization		X	Optional	Optional	
Medication Management DPI	Upload	X	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

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.