

Tracking Volunteer Skills & Notes – Volunteer Management

In some cases your volunteer numbers may be so large that you need helping keeping track of volunteer skills and notes. Some of your volunteers may be qualified in setting up the mobile dental van, or the vision lab, or the patient registration process. These skills and qualification may be recorded in the VoRIS database. When putting together your team for a new clinic there are reports that can help you make sure skills you need are in place.

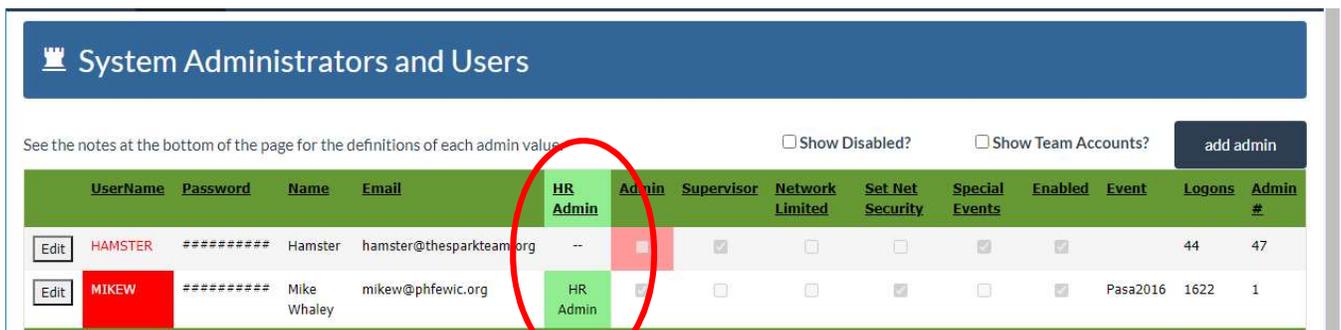
This skills and notes functionality also introduces information and reports which can only be seen by a few of your administrators. This allows more sensitive information to be recorded to help manage volunteers.

Possible uses

- Record who can operate a fork lift to help with move in/out.
- Keep a record of who has been trained to setup the dental sterilization operation.
- Which volunteers have expressed an interest in leadership roles?
- Have some volunteers been a problem in some situations? Maybe they can't stand for long periods or have problems with chairs? Or maybe you don't want to use them as a volunteer again?
- Have some volunteers helped with language translations for your printed material?
- If you have more formal training processes you may want to track those who have completed steps in these processes.
- Which volunteers are trained in the patient checkout and data processes?

HR Admin permission for administrators

VoRIS administrators may now be assigned the "HR Admin" privilege. Only admins with this privilege may assign it to others.



System Administrators and Users													
See the notes at the bottom of the page for the definitions of each admin value													
UserName	Password	Name	Email	HR Admin	Admin	Supervisor	Network Limited	Set Net Security	Special Events	Enabled	Event	Logons	Admin #
<input type="button" value="Edit"/>	HAMSTER	*****	Hamster	hamster@thesparkteam.org	--	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		44	47
<input type="button" value="Edit"/>	MIKEW	*****	Mike Whaley	mikew@phfewic.org	HR Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pasa2016	1622	1

This privilege allows the user to see the exports and reports marked for HR only, allows them to setup skills and notes, and assign skills and notes to volunteers. These processes are invisible to admins that do not have this permission.

Creating the Skills and Note types to be later assigned to volunteers

You may create any number of skills and notes in the system. These are generalized skills and may be used to track just about anything. Below is an example of skills and notes you are able to setup in your system.

To see and update the list of skills / notes use menu: Admin Functions → Volunteer Skills/Notes

Human Resources (HR) Volunteer Skills & Notes

Show inactive?

Only admins with the "HR Admin" privilege can see these pages and information.
If you need reports or exports of volunteers and their skills/notes please contact Spark. We can create those reports for you.

[add skill / note type](#)

	<u>Skill/Note Name</u>	<u>Usage</u>	<u>Allow Comments</u>	<u>Sort By</u>	<u>Active?</u>	<u>Date Added</u>	<u>HR Note #</u>
Edit	Core Volunteer Application Received	Applied to be a CORE Management volunteer.	--	10	YES	6/10/2020	1
Edit	Dental Core Training	Begun training for dental area supervision.	YES	200	YES	6/10/2020	2
Edit	Approved Dental CORE	This volunteer is approved as a dental area CORE volunteer.	YES	225	YES	6/10/2020	3
Edit	Vision Core Training	Begun training to be a dental manager	YES	300	YES	6/10/2020	4
Edit	Approved Vision CORE	This volunteer is approved for vision management	YES	320	YES	6/10/2020	5
Edit	Overseas Experience	Notes on their overseas experience	YES	900	YES	6/10/2020	7
Edit	Fork lift operator-approved	This is assigned once the volunteer has been approved to operate a fork lift.	--	1100	YES	8/16/2020	9
Edit	Problems	We have had problems with this volunteer	YES	5000	YES	6/10/2020	6

This page can only be viewed by administrators with the HR Admin permission in VoRIS.

Skills may not be deleted but you may mark them inactive to remove them from most reports.

The next page describes the fields used with skills and notes.

When you click [edit] on a skill/note the page below is displayed. You may enter the name of the skill/note, a brief explanation of what it represents, check the box if you want to be able to record details by volunteer, and enter the sort order for the skills. For many skills the sort order may not matter.

⚙️ Edit Human Resources (HR) Volunteer Skills & Notes

Skills/Notes are only viewable by VoRIS admins with the "HR Admin" privilege.

HR Skill/Note Name

HR Skill/Note Description

Has comment field? yes, allow comments for each volunteer

Sort By

Active? yes, active

The identifier for this note. Used on reports.

Description of what your organization is using this "note" for.

This skill/note may be that they either have it or not (is approved to drive the company truck). Or there may be something you write up along with the status. For example if the skill/note is that they are in training to be a dental operation supervisor you may add comments on their training status.

This allows you to set the order on the display of a volunteer's assigned HR notes.

When you make an HR note inactive it will not show up in the list of a volunteer's notes. This allows you to get the HR notes you no longer use out of the way without removing the history.

Volunteers with this HR Note assigned to them.

	Name	Profession	State	Last Assignment	Volunteer Days	Date Note Added
<input type="button" value="View"/>	ANSTON, BETTY	General Support	Washington	4/8/2020	20	6/10/2020
<input type="button" value="View"/>	ANSTON1505, BELINDA	General Support	Washington	10/24/2015	2	8/9/2020

Has comment field? A skill or note may allow you to record information about that skill. The current status of their training or licensing information or details about problems with the volunteer.

Sort By When the skills assigned to a volunteer are listed they are listed in the order of the "Sort By". For many skills this may not matter.

Note that the volunteers with the skills assigned are also listed at the bottom of the page.

Assigning Skills / Notes to volunteers

In the Admin page for each volunteer, which the volunteer cannot see, there is a new section of the page as shown below. While all VoRIS users with the administrator privilege can see this page, this section of the page is hidden unless the administrator has the "HR Admin" permission.

 Volunteer information for HR Admins only (hidden for other Admins without the "HR Admin" permission)

General Management Comments

Great volunteer if you can convince him to wear shoes.

The Management Comments are only seen on this page by HR administrators.

Below are the volunteer skills/notes assigned to this volunteer (if any). Show only assigned skills/notes

Assigned	Label	Description	Notes	Updated	SortBy
<input checked="" type="checkbox"/>	Core Volunteer Application Received	Applied to be a CORE Management volunteer.		6/10/2020	10
<input checked="" type="checkbox"/>	Dental Core Training	Begun training for dental area supervision.	Expressed interest to Mike at the Olympia clinic. Background in music so I am not sure.... MarySue said she could train at the next clinic.	6/10/2020	200
<input checked="" type="checkbox"/>	Approved Dental CORE	This volunteer is approved as a dental area CORE volunteer.	Trained at Mayfair all Saturday, not remembering gloves. But approved.	8/16/2020	225
<input checked="" type="checkbox"/>	Problems	We have had problems with this volunteer	Problems with singing old show tunes, sometimes dancing. Poppy ruffed him up a bit so maybe it will stop.	6/10/2020	5000

To assign a new skill uncheck the "show only assigned skills" checkbox. This will show the list of available skills.

Reporting on Skills and Notes

Open the Exports and Reports menu: Reports → Export Data / Report

You may notice that some of the reports are highlighted with "HR Admin Only". If a report is identified this way then only administrators with the HR Admin privilege may use this report. The report does not even show in the list unless the user has this privilege.

	Title	Description	EDIT
All Volunteers			
Export	Basic volunteer data - ALL VOLUNTEERS in the database	This exports all the basic data on the registration page for all the volunteers. They may or may not have signed up for an event. [Export #1]	Edit
Export	Report No Events	This provides the list of volunteers who registered but have not signed up for any events. They may not have registered correctly or they have canceled all the events they had signed up for. The export includes all the registration details for the volunteer including the date they first registered. [Export #11]	Edit
Export	Report Linked Assignments HR Admin Only	This lists all the volunteers in your system with linked assignments. [Export #25]	Edit
Export	Report Special Volunteers HR Admin Only	This list the volunteers with special flags set. Stop Texting or Stop Email or Registration Alert. These may be VIPs or volunteers needing special handling. [Export #27]	Edit
Export	Report Vol Skills HR Admin Only	This report gives a simple list of volunteers with skills and notes assigned. This is only viewable by VoRIS admins with the "HR Admin" privilege. [Export #28]	Edit

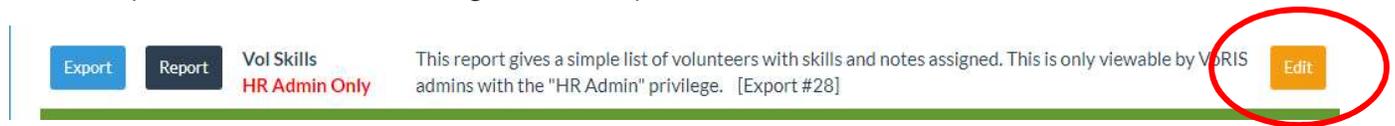
You may assign this restriction on any report (or most of the reports). The report does not need to be using the skills or notes information to get this restriction assigned. Any report may be hidden.

See the next page for instructions on how to set a report for "HR Admins only".

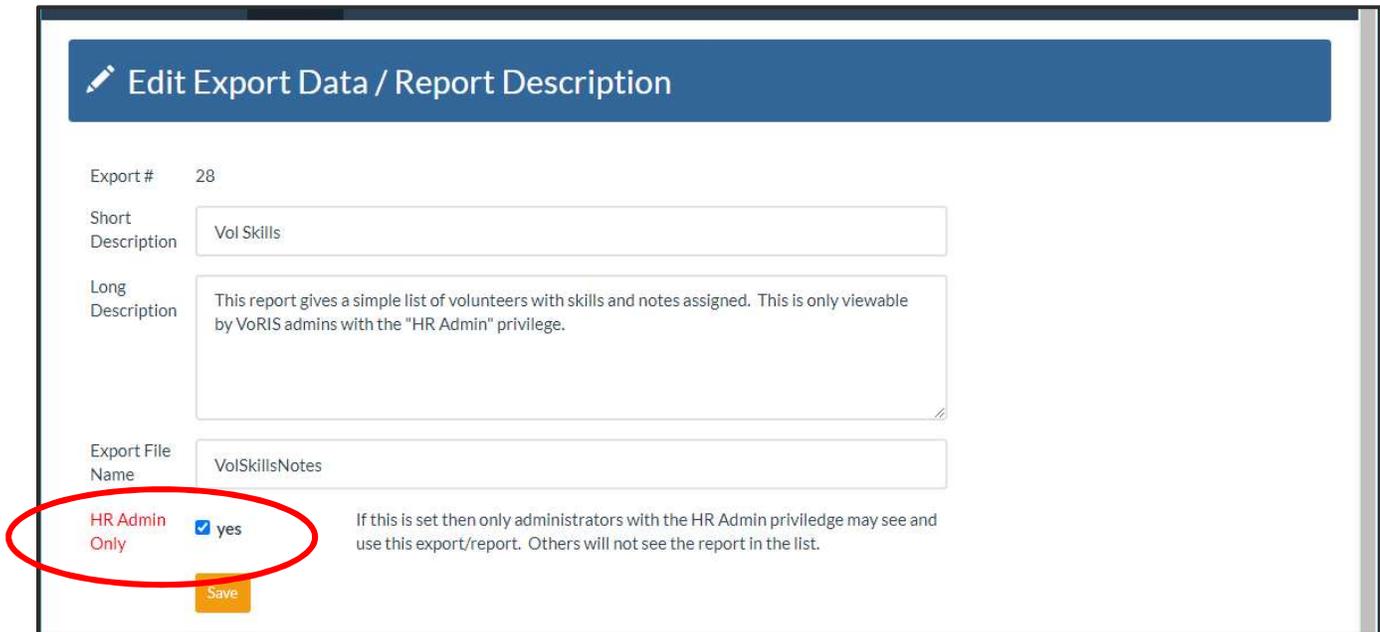
If you require any new reports to help you manage volunteers with skills and notes please email us.

Setting a report to HR Admin access only

There is a yellow [Edit] button to the right of each report.



You will see the following page. Just check the "HR Admin Only" checkbox to limit access to the report for the HR Admins only.

A screenshot of a form titled 'Edit Export Data / Report Description'. The form contains the following fields:

- Export #: 28
- Short Description: Vol Skills
- Long Description: This report gives a simple list of volunteers with skills and notes assigned. This is only viewable by VoRIS admins with the "HR Admin" privilege.
- Export File Name: VolSkillsNotes
- HR Admin Only: yes

A red circle highlights the 'HR Admin Only' checkbox and its label. Below the checkbox is a 'Save' button. To the right of the checkbox is a note: 'If this is set then only administrators with the HR Admin priviledge may see and use this export/report. Others will not see the report in the list.'

Restricting a report to "HR Admins Only"

If you click the yellow [Edit] button to the right of a report you will see the dialog shown below.

Edit Export Data / Report Description

Export # 25

Short Description

Long Description

Export File Name

HR Admin Only yes If this is set then only administrators with the HR Admin privilege may see and use this export/report. Others will not see the report in the list.

You may restrict any report in the