

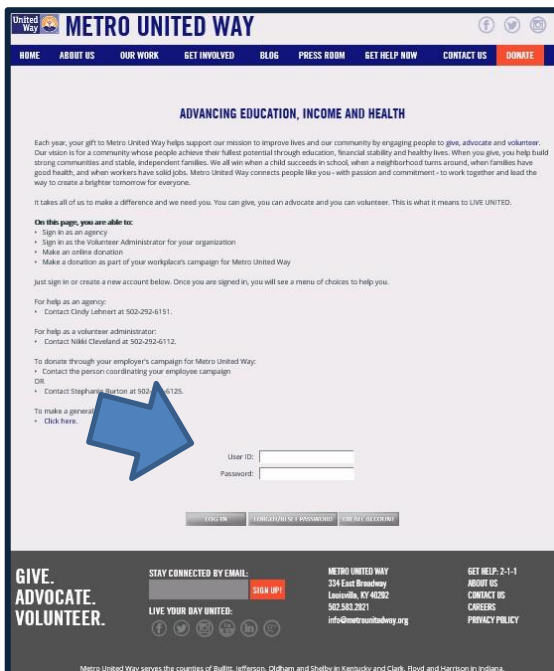
# Metro United Way e-Volunteer Volunteer Administrator Guide

*Quick reference guide to volunteer opportunity management on Metro United Way's e-Volunteer website.*



## Logon to Site:

From the Metro United Way [e-Volunteer home page](#), select VOLUNTEER ADMIN LOGIN from the TOOLS FOR ORGANIZATIONS menu.



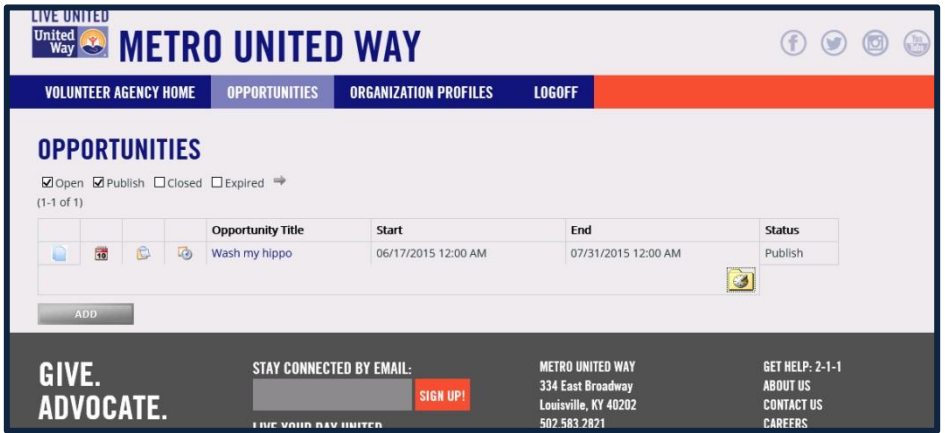
You will land on the general login page where you enter your user ID and password. Once you have logged in, you will see the Volunteer Organization Home where you will be able to add a new volunteer opportunity, update an existing opportunity, remove an existing opportunity, update your individual profile, and update your organization's profile as it appears on the e-Volunteer volunteer matching site.



## Opportunities Page:

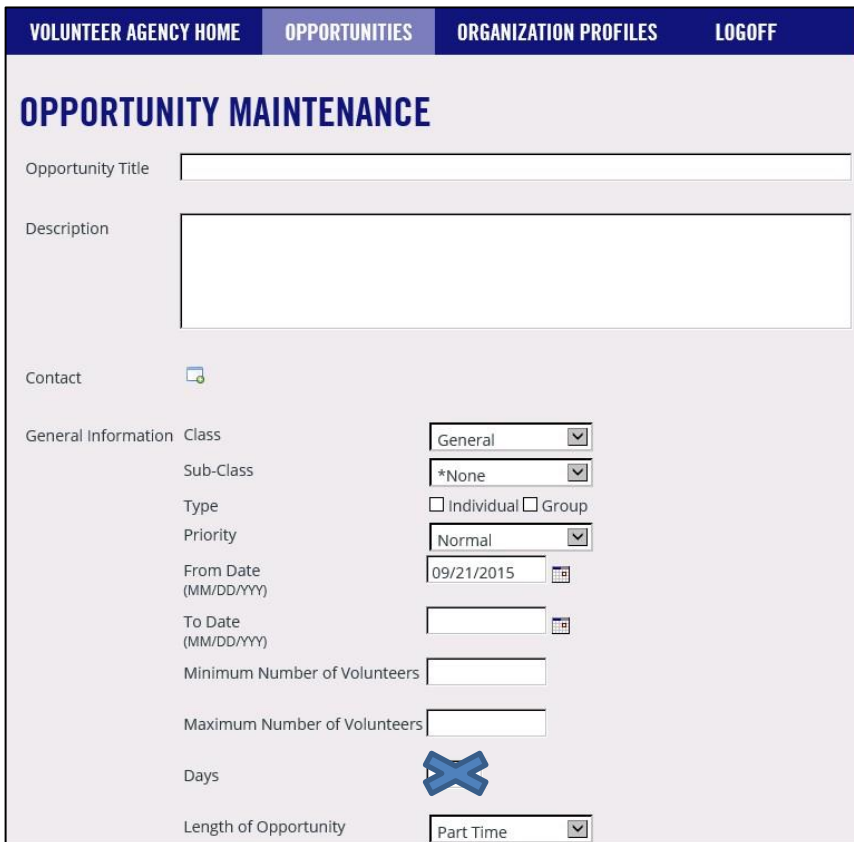
From the Volunteer Organization Home page click on the OPPORTUNITIES menu item to go to the Opportunities administration page.

On this page you can change how your opportunities are filtered for viewing, go to the opportunity detail page, get the hit history for an opportunity, copy an existing opportunity, edit the dates and times of an opportunity, get a list of volunteers referred for an opportunity, get the history of the opportunity, or add a new opportunity.

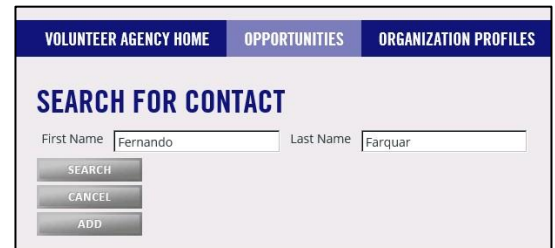


## Adding a New Opportunity:

Click on the Add button in the bottom left and you will be brought to a blank Opportunity Maintenance screen where you can begin to fill in the blanks about your new opportunity. First fill in the Opportunity Title and then a description of what the opportunity entails.



Next, click on the Contact Icon and enter the first and last name of the opportunity contact who is the person who will receive notification via email that a volunteer is interested in the opportunity.



Click the Search button to load the volunteer contact. When the contact's name appears click on the blue Select button.



Click the Add button to enter a new volunteer contact. Fields marked with an asterisk are required. Then click the Add button.

Leave the Class set to "General" and Sub-Class to \*None. Select whether it is an individual or group project and set the priority. Add the "from" and "to" dates to indicate when the opportunity is available and enter the minimum and maximum number of volunteers for the opportunity.

Disregard the Days field and select the length of the opportunity from the dropdown.

Next, enter the minimum age for the opportunity or minimum age with supervision and maximum age if there is such a requirement.

Click the Private box if you wish to keep the location of the opportunity private for security reasons.

Leave the Receive e-Mail Schedule set to "As Occurred."

Enter any required materials the volunteer would need to bring with them and/or any materials that you will be supplying for the opportunity.

The screenshot shows a form with the following fields and sections:

- Days: A blue 'X' is drawn over this field.
- Length of Opportunity: A dropdown menu set to "Part Time".
- Minimum Age: An empty text input field.
- Minimum Age with Supervision: An empty text input field.
- Maximum Age: An empty text input field.
- Private: An unchecked checkbox.
- Receive e-Mail Schedule: A dropdown menu set to "As Occurred".
- Required: A large empty text area.
- Supplied: A large empty text area.

Your address will already be populated in the Address fields. You need to change this if the opportunity will be located at a different location.

**If your opportunity will be associated with a specific event like Mayor's Give A Day, check the box next to that event.**

**Select one or more applicable interests that match the volunteer opportunity. This will ensure that your opportunities are searchable.**

Check all locations from which you wish to acquire volunteers.

Select from the list of populations those groups that the volunteer opportunity will be serving.

The screenshot shows an "Events" form with the following sections:

- Events:**
  - UPS Global Volunteer Month (09/19/2015)
- Interests:**
  - Back to School
  - Financial Stability
  - Holiday - Halloween
  - Summer
  - Education
  - Group Volunteer Opportunities
  - Metro United Way Excellence Academy
  - Youth Friendly
  - Family Friendly
  - Healthy Lives
  - Other
- Locations:**
  - Residents in Southern Indiana
  - Residents in Bullitt County
  - Residents in Jefferson County
  - Residents in Oldham County
  - Residents in Shelby County
- Populations:**
  - Infants / Preschoolers (0-4)
  - Adults (26-54)
  - Homeless
  - Low-Income / Poverty
  - Children (5-12)
  - Senior Citizens (55+)
  - Refugees/Immigrants
  - Faith Based Community
  - Adolescents (13-17)
  - Animals
  - Survivors of Disaster
  - Disabled/III
  - Young Adults (18-25)
  - Building Strong Families
  - Survivors of Domestic Violence

**Report To**  
 Report To Court  Report To School

**Skills (Must Have All )**

<input type="checkbox"/> Advocacy	<input type="checkbox"/> Fundraising/Community Giving	<input type="checkbox"/> Program Management	<input type="checkbox"/> Animal Services
<input type="checkbox"/> Caregiver	<input type="checkbox"/> General Office/Admin	<input type="checkbox"/> Public Relations/Outreach	<input type="checkbox"/> Art/Culture
<input type="checkbox"/> Companionship	<input type="checkbox"/> Landscaping	<input type="checkbox"/> Reading	<input type="checkbox"/> Computer/Internet Services
<input type="checkbox"/> Construction/Maintenance	<input type="checkbox"/> Language Translation/Interpretation	<input type="checkbox"/> Recreational Activities/Sports	<input type="checkbox"/> Food Preparation/Delivery
<input type="checkbox"/> Counseling/Information Support	<input type="checkbox"/> Leadership Development	<input type="checkbox"/> Special Events	<input type="checkbox"/> Teaching
<input type="checkbox"/> Disaster Services	<input type="checkbox"/> Legal Services	<input type="checkbox"/> Tax Preparation	<input type="checkbox"/> Writing / Editing
<input type="checkbox"/> English Language Instruction	<input type="checkbox"/> Mentoring	<input type="checkbox"/> Transportation	
<input type="checkbox"/> Finance/Accounting	<input type="checkbox"/> Meal Preparation/Serving/Delivering	<input type="checkbox"/> Tutoring	
<input type="checkbox"/> First Aid	<input type="checkbox"/> Painting/Wallpapering	<input type="checkbox"/> Math/Science	

**Special Needs**  
 Wheel Chair Access

**Time**  
 Weekdays  Weekly  Evenings  Monthly  
 Weekends  Occasional  One-Time

**Training (Training )**  
 Agency Seminars  Allocation Training  Diversity Training

ADD  
 CANCEL  
 PRINTER FRIENDLY

If you accept court ordered or school required volunteers, mark the applicable Report To fields.

Select all of the skills that align with the needs of your volunteer opportunity. This will further help in matching qualified volunteers with your opportunity.

If your volunteer opportunity has wheelchair access and can be performed by those individuals who use wheelchairs, select this item.

Next indicate the times the opportunity is available to be performed. Again, this assists in matching volunteers with your opportunity.

Indicate any required training and click the Add button to submit you opportunity. You opportunity submission will be received by Metro United Way for proper vetting, and in a short time, your opportunity will be published and available on the website.

## Editing an Existing Opportunity

Log in to the site as above, and if you have existing opportunities you would like to update, copy, or view the history of, you can do so here, too. Change the sort criterion by checking the appropriate opportunity status boxes to see open, published, closed, or expired opportunities that you wish to work with.

The icons are described below:

Opp.	Time Slots*	List	History of selected

Open  Publish  Closed  Expired →

Use these for filtering your opportunities by their status. Click the arrow button to update the list once you changed your filter options.

View Complete History

Creates an identical copy of the opp.

Time slots are specific date and time frames for an opportunity. Typically they are used for one-time opportunities. Do not use time slots if your opportunity is available for an extended period of time.

Provides filterable list of volunteers referred to the opportunity. It shows when they volunteered and their status. You can email them from this screen.

**HIT HISTORY**

From Date: 07/24/2015  
 To Date: 08/24/2015

APPLY

Opportunity	Date	Count
Test - Be a good boy for one hour	08/16/2015	1
	08/11/2015	1
	08/03/2015	3
Total		5
Grand Total		5

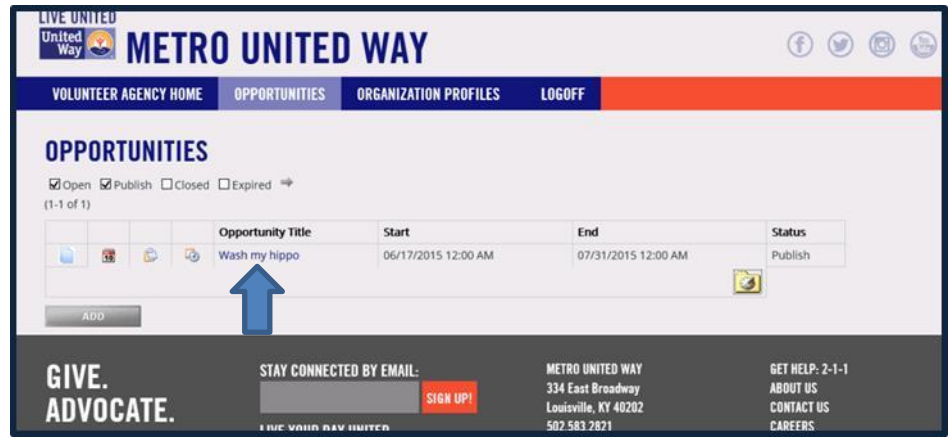
RETURN  
 PRINTER FRIENDLY  
 SPREADSHEET

Select date ranges and click apply button to get a history of hits on **all** of your opportunities.

Click printer friendly button to print or spreadsheet button to get an Excel file.

To do a comprehensive edit of the opportunity, simply click on the Opportunity Title, and you will be directed to the same editing screens you see when building a new opportunity.

Once you have made your edits, click on the update button at the bottom of the screen.



## Organization Profiles

You can update the name of your organization and add your website address if you like by selecting the Organization Profiles menu and then Organization Profile.

You can update or add contacts from your organization by selecting Organization Contacts from the Organization Profiles menu.

Click on the pencil icon to edit an existing contact. Click on the red "X" to delete a contact or click on the Add Contact button to add another contact for your organization.

You can view and edit your personal profile by selecting My Profile from the Organization Profiles menu. You can change your name, add or update email addresses, add your home address, and even change your password.

To change your password click on the pencil icon next to the obscured current password and enter your new desired password.

You can even review and update your own volunteering profile to set your matching criterion by clicking the Volunteer Info button at the bottom of the Your Profile Information page.

## Managing Your Volunteers

When a volunteer registers for your volunteer opportunity, you will automatically receive an email from the system letting you know their name and contact information. You should reach out to them to confirm that you received their volunteer registration and include any detailed or special instructions they may need to know (ex. parking, wardrobe suggestions).

You can see a list of all the people who have signed up to volunteer for an opportunity by clicking on the Volunteer List icon to the left of the opportunity title on the Opportunities page. Once there, you should go through the list of volunteers and update the status of volunteers that you would like to assign to the opportunity. To do so, simply click on the pencil icon to the left of their name to open the update screen. Once there, change the Assigned Status drop-down box to "Assigned". Then click Update at the bottom of the page.

To decline a volunteer (ex. they don't meet the age requirements), follow the same steps as above, but change the drop-down box selection to "Declined by Agency." Please make sure that you email volunteers that you decline in a timely manner to let them know that their services are not needed.

You can also send emails to volunteers through the e-Volunteer system. Go to the opportunity, and click on the "Volunteer List" icon. If you would like to send an email to all the volunteers listed there, click on Send Email. To send an email to just one volunteer, click on his/her email address. To only choose volunteers that have a certain status (ex. "Assigned," "Referred," etc.) choose that status from the drop down box at the top of the page, and then click "Send Email."

On the Send Email screen, you will see that your email address is listed as the sender. Type your subject and email text, and then choose from the options at the bottom. You can "View Message" to see what the message will look like, attach a file, cancel the email, or hit "Send," and it will send the email to the chosen recipients.

## **Logoff**

Finally, when you are all done you can click the Logoff button at the top right of the menu bar. Logging off will return you to the Agency login page.