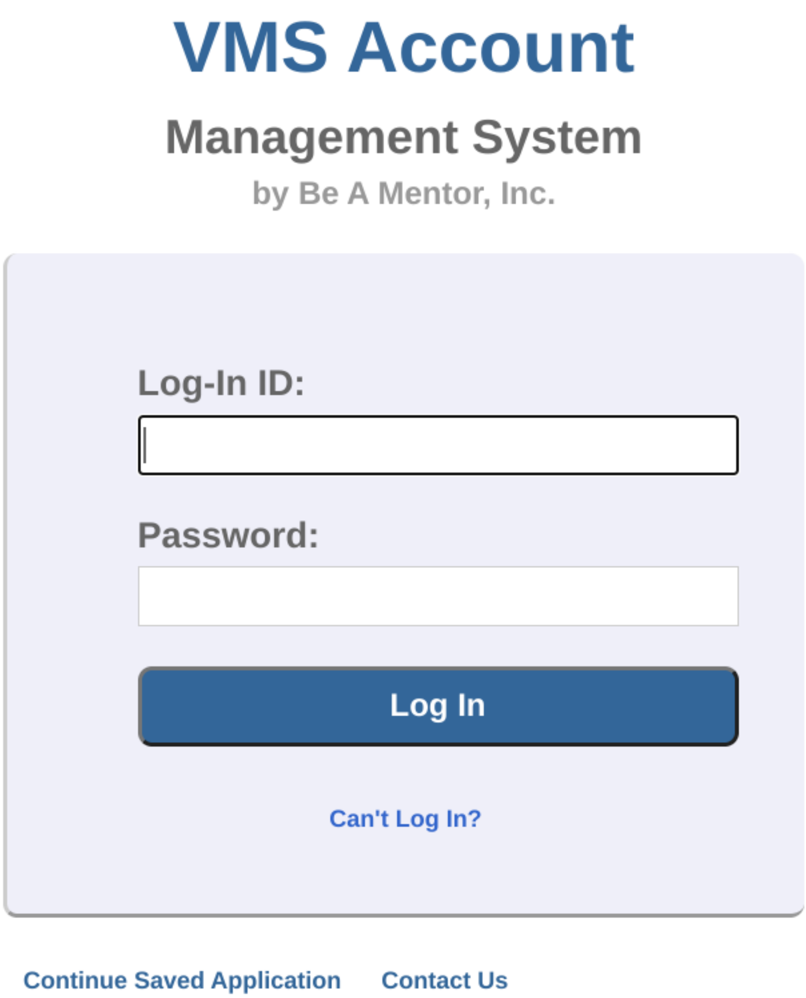
Coordinator Manual

Table of contents:

Logging In and The Coordinator Menu

Logging into VMS:

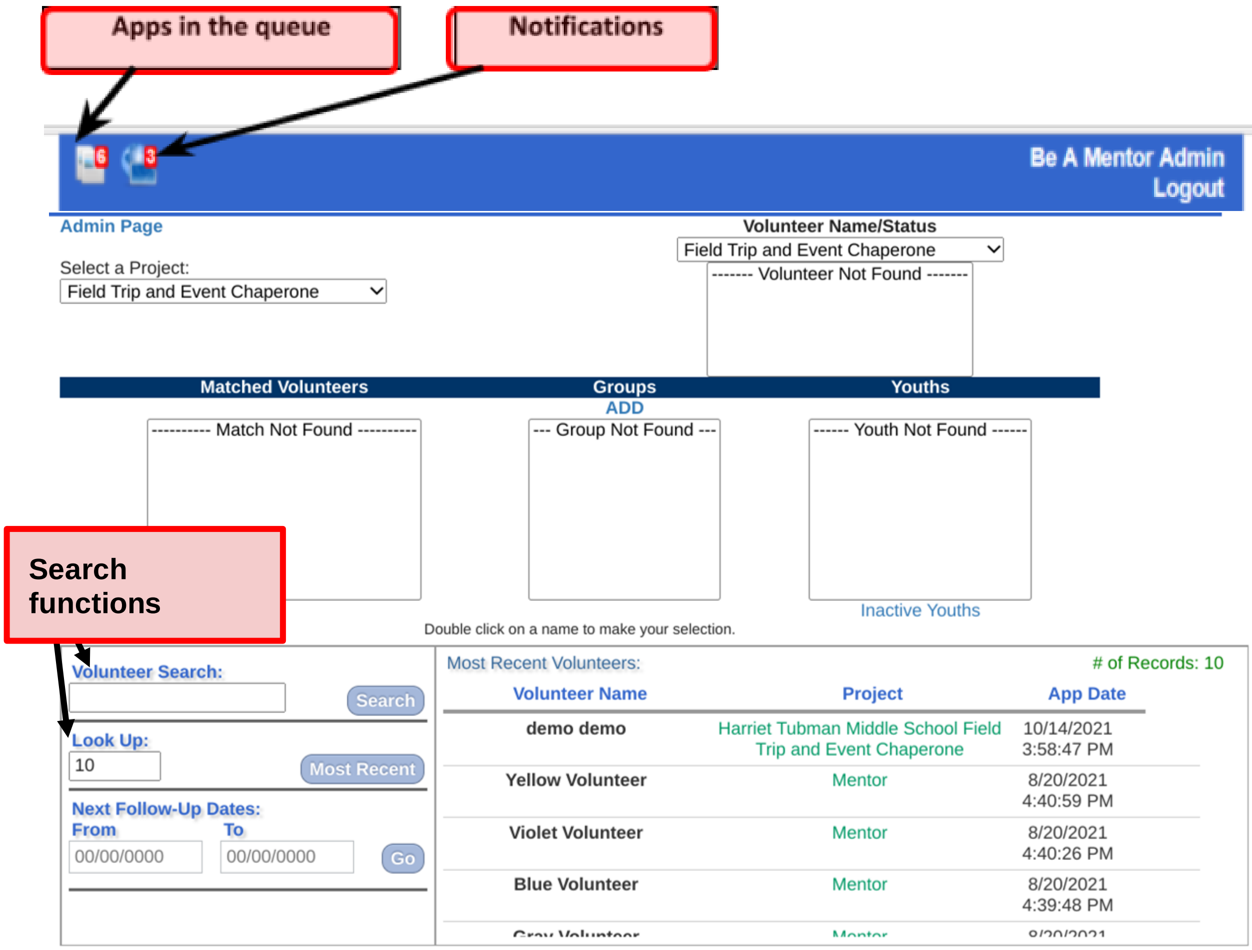
To get to the VMS log-in page you go to www.beamentor.org/login



Enter your log-in ID and password and click the “Log In” button.

Coordinator Menu Page:

The Coordinator menu page is the first page you will see when you log in.



Search Function

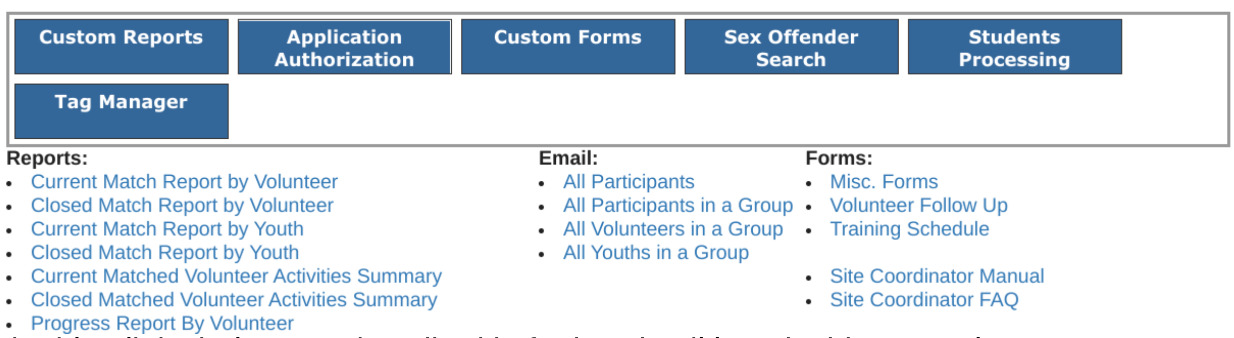
Search will initially show the first 10 people who submitted applications that day; the first name being the first accepted application. You can modify the number of most recent applicants displayed by changing the number in the box labeled "**Look Up Most Recent**" which is outlined below in red.

There are four ways to search for a person:

First Name
Last Name
Last Name with First Initial (No Spaces)
Volunteer's Email Address

It is best to search by first name or by email. For example, if a volunteer's name is Bob Smith Jr, you can type "Smith" or "Bob" and use CTRL + letter F in the keyboard to find his **Volunteer ID** in the database. Once your search produces results, you double click on the person's name to access their volunteer profile screen.

Links at the bottom of Coordinator Menu:



The blue links below are described in further detail later in this manual:

1. Volunteer Process: this links to a powerful tool used for viewing and processing applicants and mentors
2. Custom Reports: Links to where you can create a report for various types of clearances
3. Custom Forms: Link to where you can create fillable forms for applicants, references, etc or to gather information.
4. Tag Manager : Link to where you can create and edit tags to aid in processing.

The links at the very bottom are categorized into three sections with quick links:

Reports has a series of quick reports that can be run. The "current match report by volunteer" for instance, shows all currently matched volunteers and their matched groups or youth.

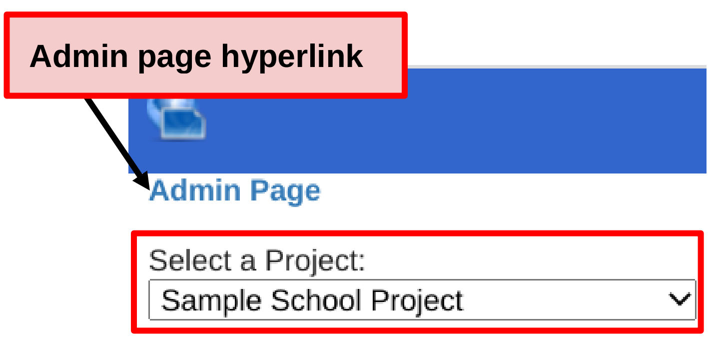
Email gives you the ability to email a specific audience quickly, like all participants in your project, or volunteers.

Forms has a link to several miscellaneous forms in rtf and pdf formats, the Volunteer Follow-up link for applicants who have not yet completed requirements and a FAQ for coordinators.

Admin Page

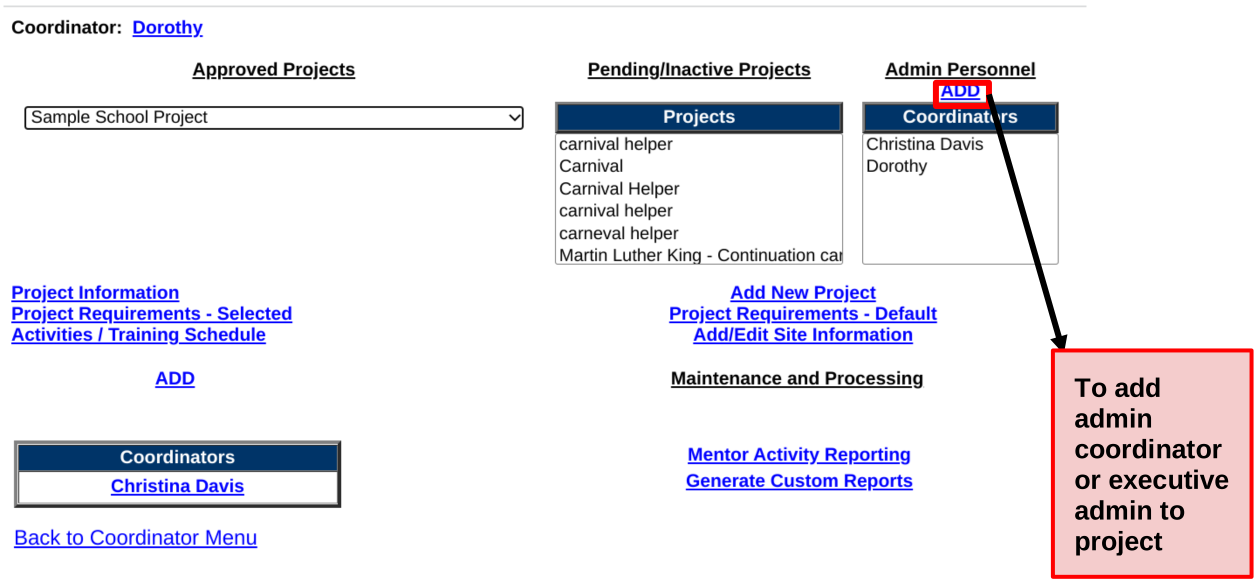
The admin pages are where the bones of a program are managed. Projects can be added, sites can be added and modified, volunteer types are added and edited, coordinators are added and managed. Clearance requirements are chosen and instructions/links/documents are added and changed. This is where training schedules can be created and modified for applicants to sign up for.

"Select A Project" (See below) determines what information is shown in surrounding boxes of Matched Volunteers, Referred Volunteers, Groups and Youth.



To access the Admin Page for any specific project: Go to Coordinator Menu, select the "Project Code" and "Project Type" from their dropdown menus.

Click on "Admin Page" hyperlink. Now you are on the Admin Page (See below).



Under Admin Personnel, the "ADD" button is only for adding an **Admin coordinator** (which allows access to all projects under the program's portal, volunteer process and the Admin page) and **Executive Admin** (which can do that and also give admin privileges). Adding an **in-service-area coordinator** (who only has access to specific projects under the portal) is done at the **Add/Edit site** button later in this section, and specific projects are set up at the Authorize screen.

Each blue hyperlink allows you to make specific changes. The left half of the screen pertains to the project displayed in the *Approved Projects* drop down at the top of above. You can edit or view the "Project Information", "Project Requirements" or the "Activities and Training Schedule". The right half of the screen pertains to all of the Projects associated with the Project Code that was selected on the Admin page.

You can change all of the following at once if they require the same things, otherwise do it individually:

1)"Add a New Project"

2)"Add/Edit Site Information"

3)“Project Requirements”

If most projects will have the same requirements, then you can set the “Project Requirements-Default” for what the majority of the projects require, and then go through the Approved Projects list and set up each individual project that has different requirements, and change them through the “Project Requirements-Selected” link on the left side of the Admin page (note that when changing requirements, select the pink Volunteer Types at the top of the list- site/volunteer types are Read Only

Project Information

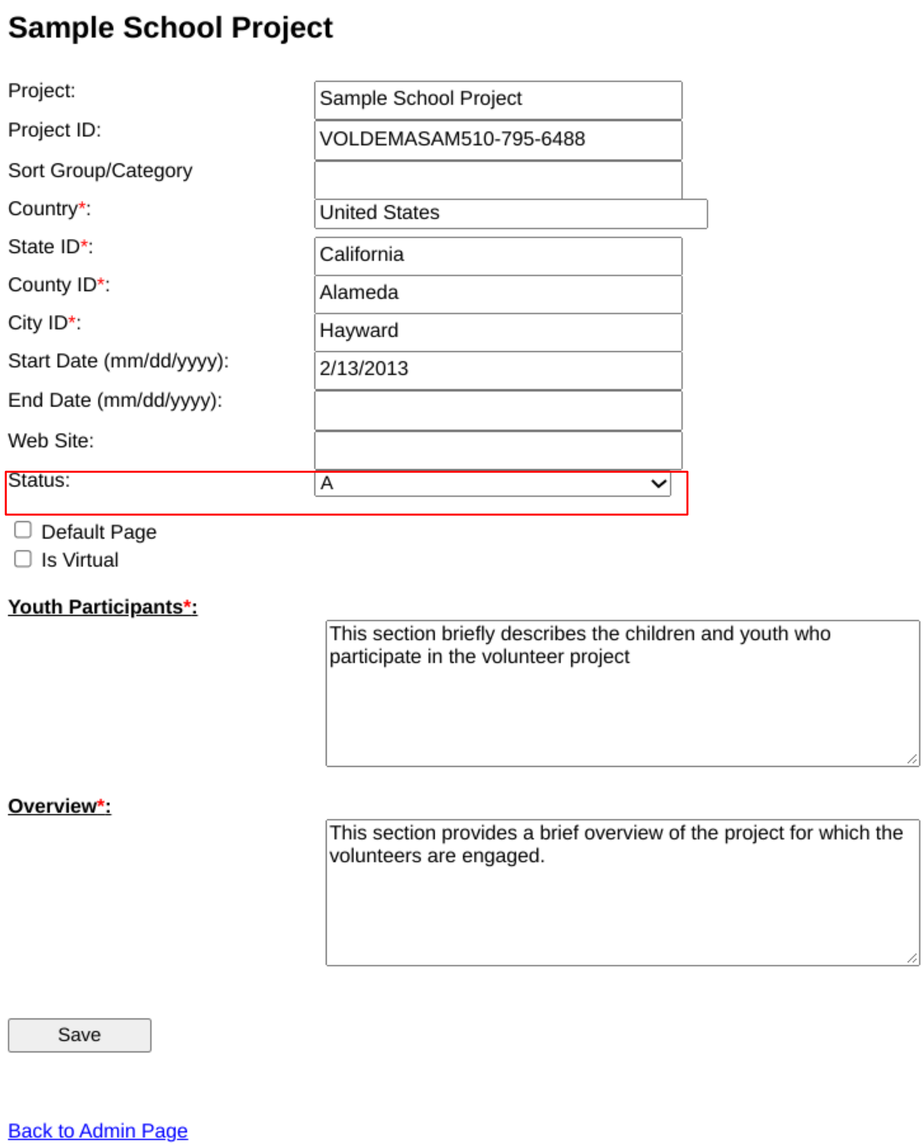
Project Statuses:

“A”= Active Project”

“I”= Inactive Project”

“P”= Pending Project”

Once a project is approved or inactivated, change the Status and save. Inactivated or Pending projects will appear in the corresponding box on the Admin Page. The information entered in Youth Participants and Overview is also what shows in the *application f* or the project description (IE what the applicant will see). Always save any changes and click Back to Admin Page rather than the back button when you are finished.



Sample School Project

Project:	Sample School Project
Project ID:	VOLDEMASAM510-795-6488
Sort Group/Category	
Country*:	United States
State ID*:	California
County ID*:	Alameda
City ID*:	Hayward
Start Date (mm/dd/yyyy):	2/13/2013
End Date (mm/dd/yyyy):	
Web Site:	
Status:	A

☐ Default Page
☐ Is Virtual

Youth Participants*:

This section briefly describes the children and youth who participate in the volunteer project

Overview*:

This section provides a brief overview of the project for which the volunteers are engaged.

Save

Back to Admin Page

Project Clearance Requirements

Below shows the Projects Requirements Page where you can choose which requirements are needed for any given project. You can also select “Project Requirements-Default” to require the same things for every project rather than going one by one. Either way, the picture below appears:

Project Attributes

Application Type: voldemVolunteer **Follow Up Form:** View Only

Background Clearance (managed by BAM): ☑ **Welcome Letter:** ☑

Send notification about pending application after days: 5 **Email ID:** 0

School Site: ☑

Project Clearance Requirements

Requirements	Brief Instructions (Edit All)	Required Documents & Files
Welcome Letter	Edit	Welcome Letter
☑ Fingerprinting Validity Period 0 Years (0 = Never) DOJ Only Live Scan Cost: $ 26 DOJ & FBI Live Scan Cost: $ 41	Edit	Documents & Files
☑ DOJ Clearance	Edit	Documents & Files
☑ FBI Clearance	Edit	Documents & Files
☐ FBI Mininum Residency (10 years Rule)	Edit	Documents & Files
☐ Driver Clearance Report (e.g. DMV Report)	Edit	Documents & Files
☑ Drivers License	Edit	Documents & Files
☑ Proof Of Insurance	Edit	Documents & Files
☑ TB Screening Validity Period 4 Years (0 = Never)	Edit	Documents & Files
☑ Sex Offender Check Validity Period 0 Years (0 = Never)	Edit	Documents & Files
☐ Criminal Check Clearance Validity Period 0 Years (0 = Never)	Edit	Documents & Files
☐ Available To Others	Edit	Documents & Files
☑ Training Class Required	Edit	Documents & Files
☑ Questionnaire Required	Edit	Documents & Files
Number of References: 2	Edit	Documents & Files
☐ Clearance Letter	Edit	Documents & Files
☐ Volunteer Picture	Edit	
☐ Vaccination/Neg Test Results	Edit	Documents & Files
☐ Payment	Edit	Documents & Files
☐ Virtual Setup	Edit	Documents & Files
☐ ID Check	Edit	Documents & Files
☐ Documents	Edit	Documents & Files
☐ Resources	Edit	Documents & Files

Back to Admin Page

Project Requirements

You will go through each requirement and follow the steps below:

Requirements - Select the desired requirements for the specific volunteer type by checking the box next to it. Only the selected requirements will appear for the volunteer to see. You can enter the number of years some of the requirements will be valid so that you can later follow up with volunteers when those documents need to be renewed

(Based on expiration dates, reminder notices are sent to the volunteer/mentor 10 and 30 days beforehand and on the day the requirement expires).

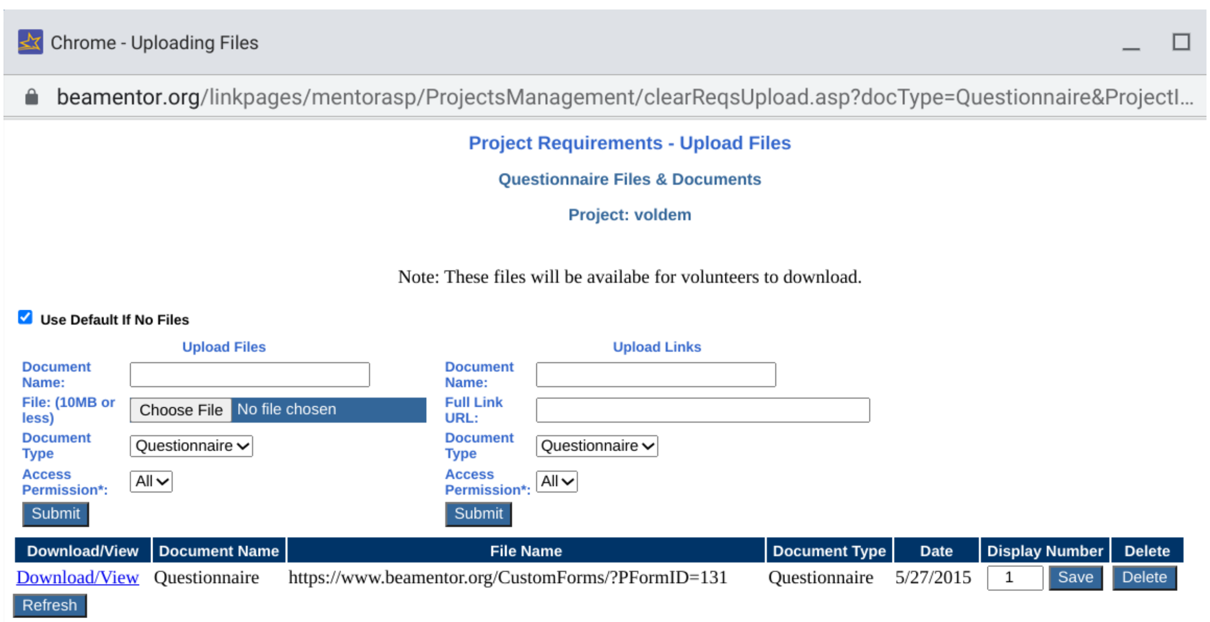
To select the number of references required, enter a number, up to three. If your program does not require references, change this to “0”.

Brief Instructions - Explain how to submit or obtain the requirement, you can use “Edit All” to make changes to all instructions at once or “**Edit**” on the row corresponding to the requirement you would like to change. Make sure to click on “**Save**” in the upper right hand corner after editing the instructions.

Each volunteer will see the question mark and be able to roll over the icon to see the instructions that you have listed for the corresponding requirement.

Required Documents and Files - Click “Documents & Files” to upload any documents or additional forms a volunteer may need. You can also upload a link to an online form or a Custom Form that you create through the VMS.

Here you can also order the documents or links to change how they are displayed for the applicant, by adjusting the numbers under Display Number (if you accidentally use two of the name number, it will default to alphabetical with those):

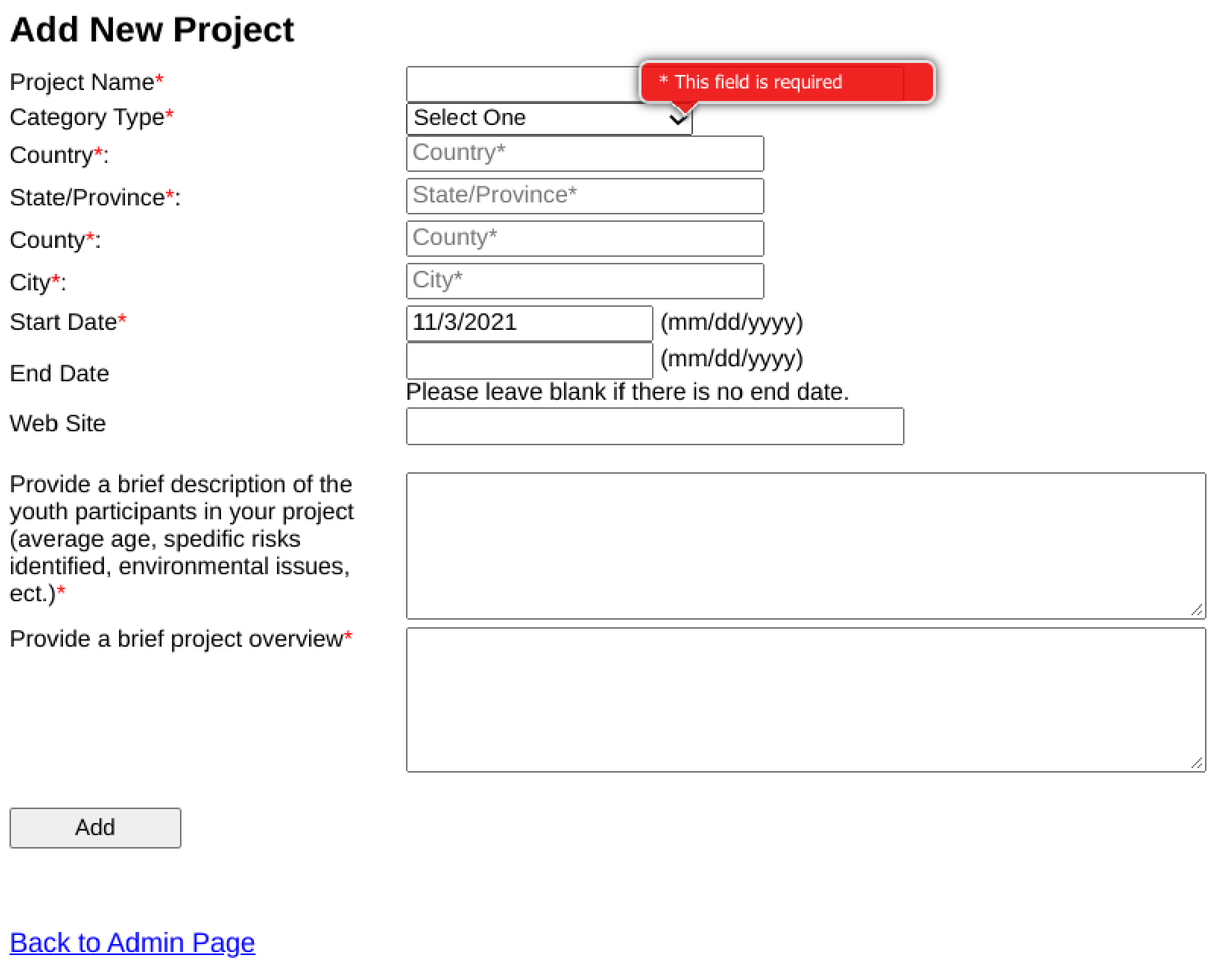


Changing any individual projects Selected Requirements under the Approved Projects list will override the default requirements, and you may want to uncheck the “Use Default If Empty” box for the Brief Instructions and Required Documents and Files if you are using different instructions and materials so if you delete a form and do not replace it, it will not use the default form instead. Usually you would want to replace the form right away, change instructions to not include a necessary form, or uncheck the requirement altogether if it is no longer needed.

The checked requirements, brief instructions, and uploaded documents are displayed on the individual's dashboard after they login for them to complete the process autonomously. Click "**Save**" to save the information and a page to take you back to Coordinator Menu or Admin Page will appear.

Tip: if you are looking to edit a set of instructions and do not see it under Selected Requirements, always check Default.

Add New Project



Add New Project

Project Name*	* This field is required
Category Type*	Select One
Country*:	Country*
State/Province*:	State/Province*
County*:	County*
City*:	City*
Start Date*	11/3/2021 (mm/dd/yyyy)
End Date	(mm/dd/yyyy) Please leave blank if there is no end date.
Web Site	
Provide a brief description of the youth participants in your project (average age, spedific risks identified, environmental issues, ect.)*	
Provide a brief project overview*	

Add

Back to Admin Page

"Add New Project" is only used to add side projects that you do not want to be initially visible from the drop down under "sites" (such as an application for a classified employee vs a volunteer). To add a project associated with a particular site, it should be added via "**Add Volunteer Type**" on the **Add/Edit Site** page described further down.

After adding a new project, the volunteer type or program will display on the application for your volunteers to choose from. Enter in information to the fields with red asterisks. The *youth description and project overview* will be displayed as details about the volunteer type when a volunteer decides on what programs they would like to be involved in. Select "Add" and a screen will appear where you can return to either

Coordinator Menu or the Admin Page.

Going back to the Admin Page, you can verify your new projects requirements. You want to make sure that the new applicants will receive a welcome email with instructions by checking the Automatic option. You will also want to verify all instructions are clear as well that all forms are uploaded.

Add/Edit Site Information

Select a Site

☐ Display/Edit Deleted Sites

Site Name	Type	Status
○ Harriet Tubman Middle School	M	Active
○ Martin Luther King - Continuation	M	Active

[Add New Site] [Edit Selected Site] [Delete Selected Site]

Back to Admin Page

Back to Coordinator Menu

“Add/Edit Site Information” allows you to add, inactivate or edit school or site information. This information includes: coordinators, volunteer types and contacts. To edit or delete, select the radio button next to the school name then click the desired button.

Figure 9.2 below shows the Edit page and what happens when you select “Add Volunteer Type” or “Add Coordinator”

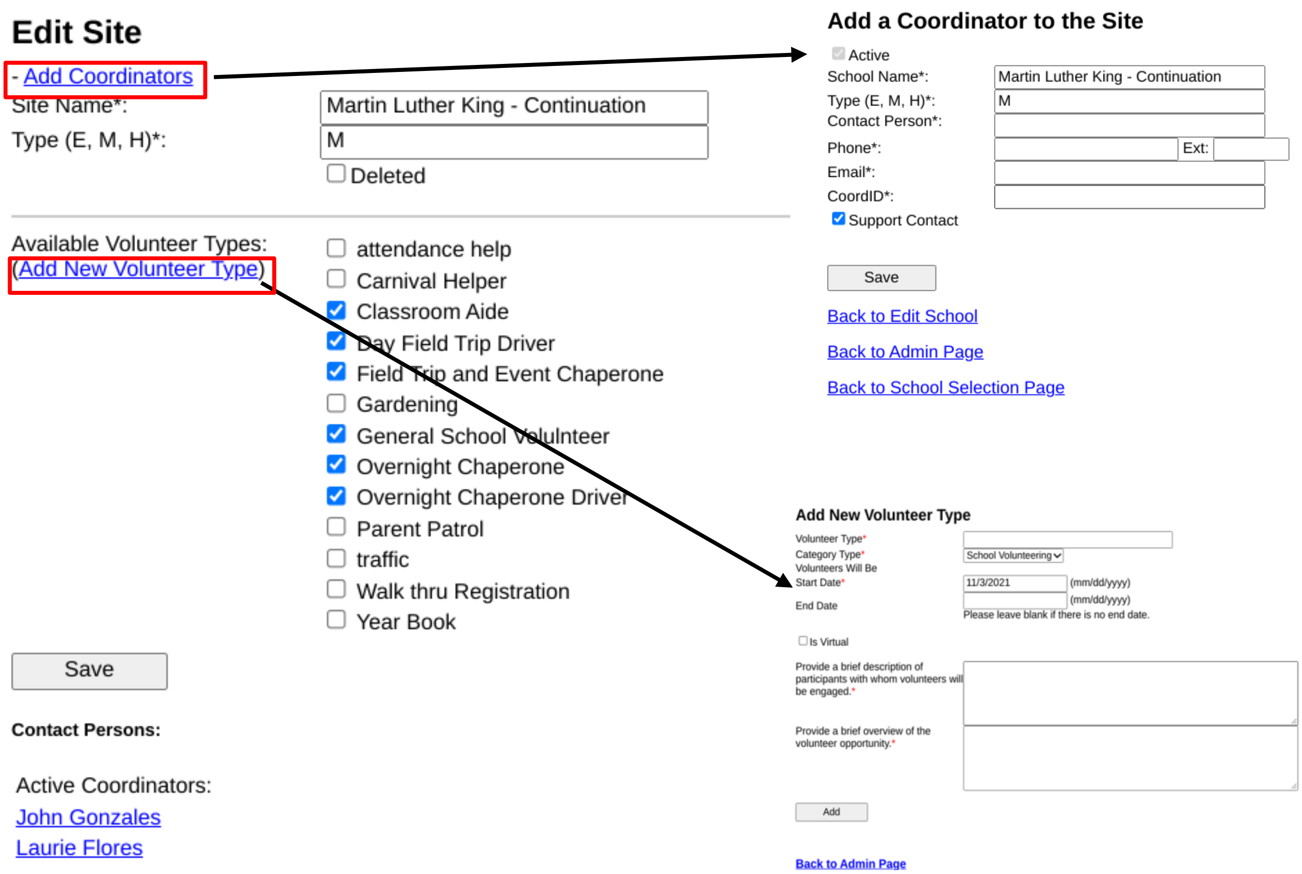


Figure 9.2

Add/Inactivate Coordinator:

The Edit page displays what volunteer types are available for that site by the checked boxes. It also shows which coordinators are **"Active**" or "**Inactive**". You can change this status by clicking their name, and unchecking the Active box if they are no longer a coordinator. If there is only one coordinator listed for the site/program, you will be prompted to add a new coordinator before making the previous coordinator inactive.

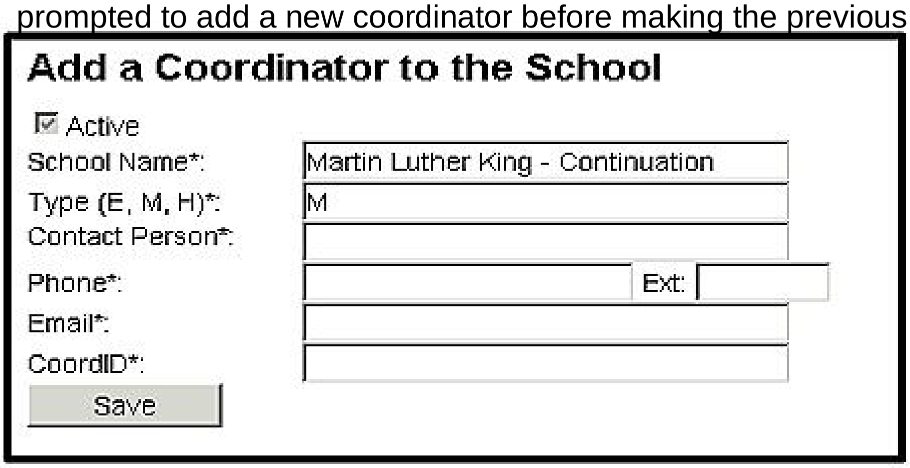
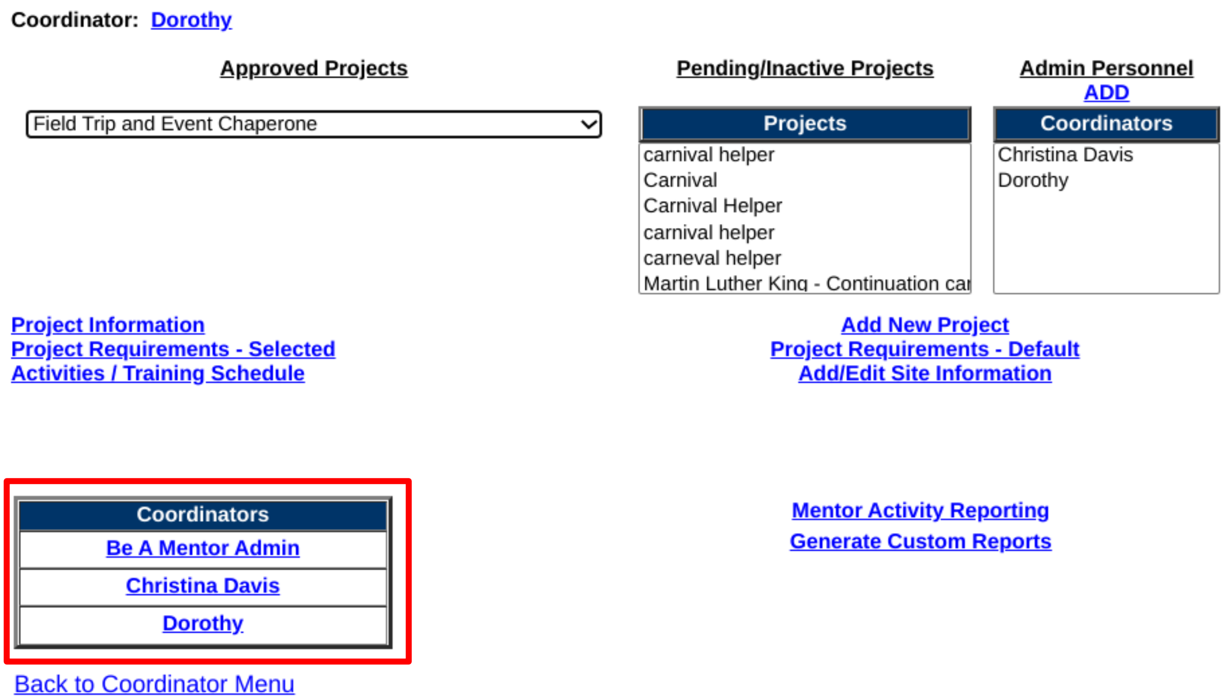


Fig. 10.1

When adding a coordinator, you create their username and a generic password is created. Notify them of their username and password, which can be found by clicking on their name after setting them up as a coordinator, and let them know that upon their first log in, they will be prompted to update their information. Make sure to leave the box next to the word Active checked so that it will display the new coordinator's information.

Once a coordinator is added, click their name on the main Admin Page:



To open their Coordinator Profile:

Coordinator Information

Project: Field Trip and Event Chaperone

Name: Dorothy
Type: voldem - Admin
Coordinator ID: VOLUNTEE Password: •••••••••

☐ Support Contact

Residential Info

Home Phone: 555-555-5555 Cell Phone:
Email:

Business Info

School: x
School Address: x
x
Alabama 00000
Work Phone: 555-555-5555 Ext:
Fax:
Email: dgsdgs@beamentor.org

Notes:

Authorize Save

[Back to Admin Page]

At the bottom, click **"Authorize"** to view the authorization the coordinator has (these are the projects under the portal they will have access to)

Coordinator: Dorothy

	Project	Manage	Select Only	Contact for Sign Up	Contact for Emails	Added Date	Added By
Edit	General School Volulnteer	True	True	False	False	10/14/2021	Be A Mentor Admin
Edit	Field Trip and Event Chaperone	True	True	True	True	10/14/2021	Be A Mentor Admin
Edit	Gardening	True	True	False	False	10/14/2021	Be A Mentor Admin
Edit	Martin Luther King - Continuation Gardening	True	True	False	False	10/14/2021	Be A Mentor Admin
Edit	Harriet Tubman Middle School Classroom Aide	True	True	False	False	10/14/2021	Be A Mentor Admin
Edit	Mentor	True	True	False	False	10/14/2021	Be A Mentor Admin
Add							

Here these can be edited, or new ones added by the Executive Admin as needed.

Please Note: When a coordinator is made inactive, their authorizations for “Contact for Sign Up” and “Contact for Emails” must be changed to False BEFORE they are made inactive, or they will continue to receive emails and will still be listed for contacts.

Add/Edit Volunteer Types:

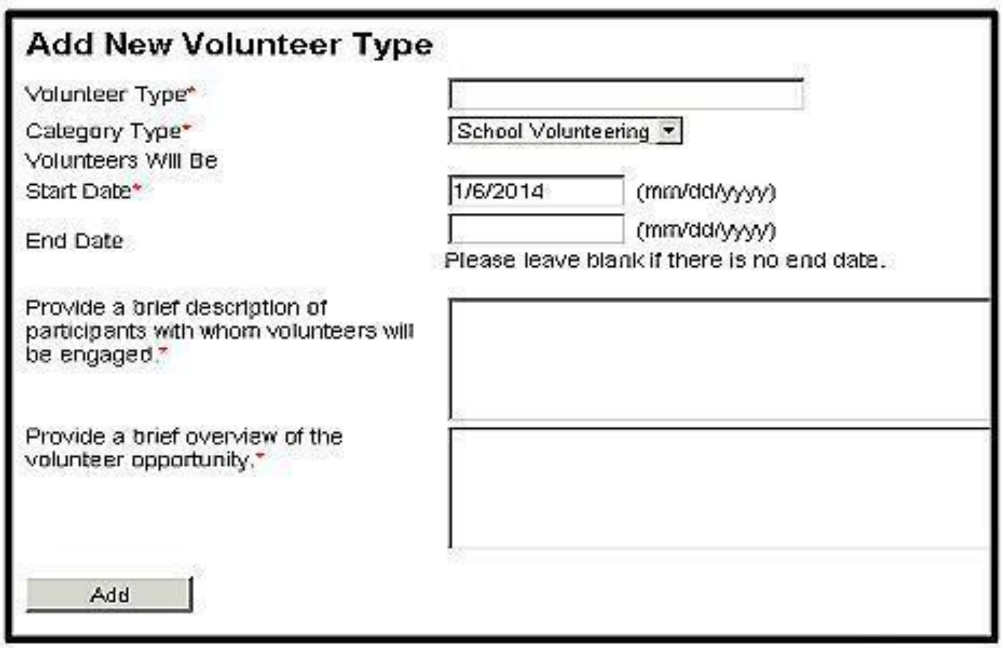


Fig. 10.2

Adding a volunteer type to one site also makes that type available to all sites. To have it show as an option on the application, you need to go into each site and check mark it.

Add/Edit Training and Activities

Another feature of the Admin screen is adding or editing Activities/Training Schedule. On the main portal page, as well as the project description page there is also a button called Activities, where volunteers can sign up for an event, and the coordinator will be notified of their sign up. The activities set up on the Admin page will be displayed on the portal page and application as well. First go to the Admin Page and click the “Activities/Training” as seen in Figure 11.1.

Select an Activity / Training Location

Project: Field Trip and Event Chaperone

No Location Found.

Add New Location

Fig. 11.1

The "Select an Activity/Training Location" is the first screen to appear. Click "Add New Location".

Select an Activity / Training Location

Project: Field Trip and Event Chaperone

	Location	Street	City	State	Zip	Room	Day	Time
○	City Hall	123 Main Street	EveryTown	California	94444	Mayor's Conference Room		6:00 pm-9:00 pm

Add New Location | Edit Selected Location

You should now see the New Location Screen in Figure 12.1 will appear. You need to enter in an address, time and date. To add a date click on the Dates field and the date window pops up. Choose your date and click Add. Select the Open checkbox to show that this location is still active. Then click "Save", and when you go to select an Activity/Training Location, your new location will be present.

Now that we have our new location, we can see that the Activities/Trainings Location link will reflect that. If the location needs editing then, we choose the radio button next to Location and click "Edit Selected Location"

Please note that until a specific date and time is selected, the activity or training will not be available for mentors to sign up for on their dashboard.

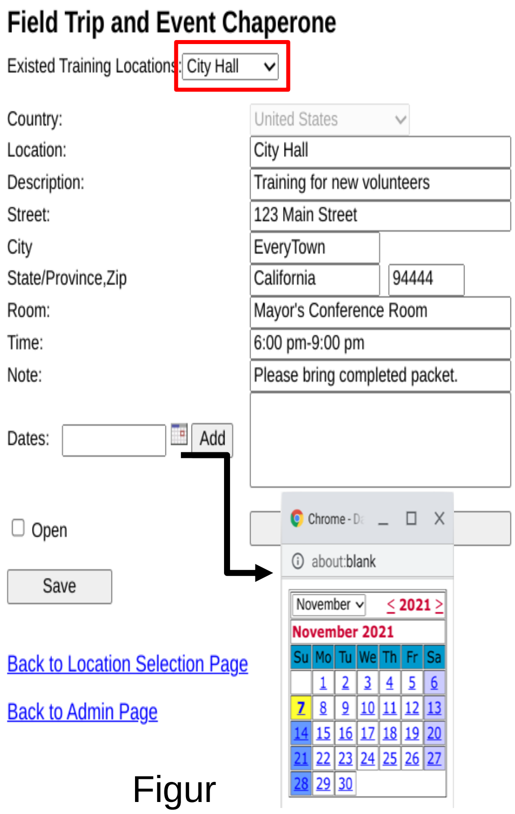


Figure 12.1

Volunteer Management

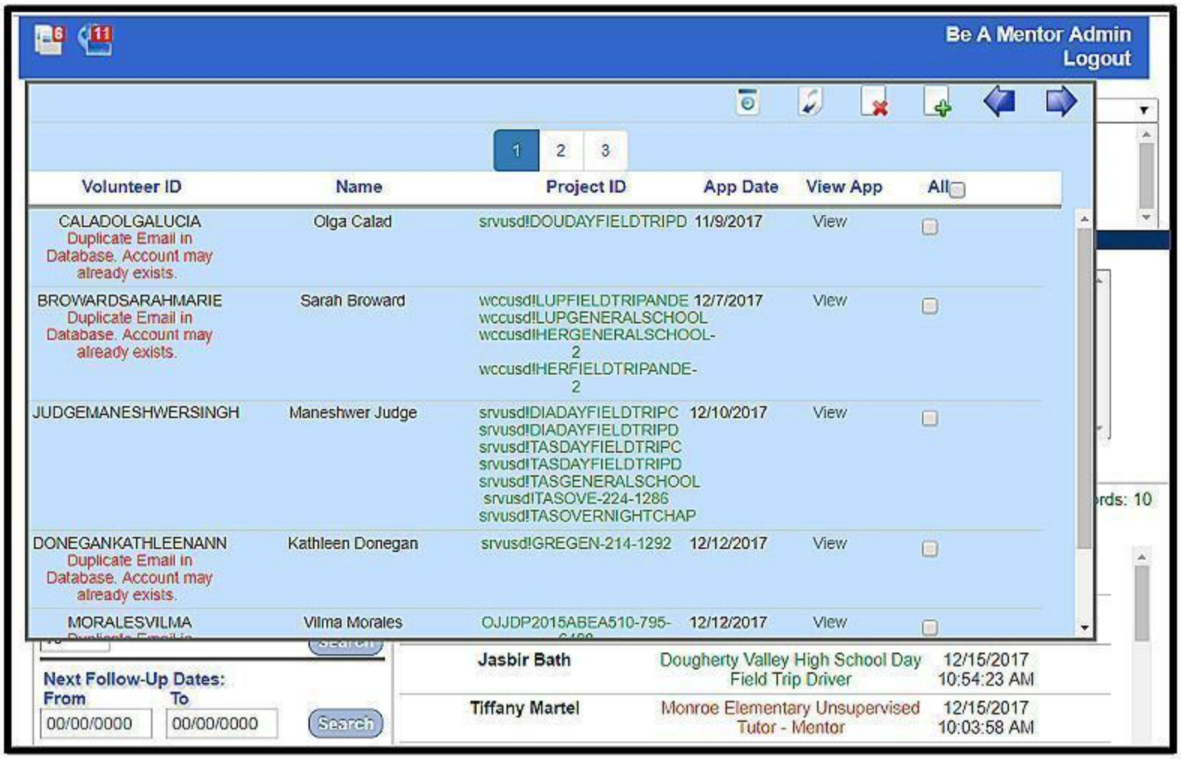
Applications in the Queue:

An application will automatically go in the queue for review in the following cases:

1. If an applicant self-discloses committing a crime on their application.

2. If the applicant applied with an email address that we already have on file for another volunteer.

3. If the applicant applied with the same name as a volunteer already in our system.



New Application Icon

The application icon looks like two pieces of paper stacked at the top right-hand group side of the VMS home screen. Notifications of any new applications that need processing will cause a number within a red box to appear on the application icon (See Figure 1).

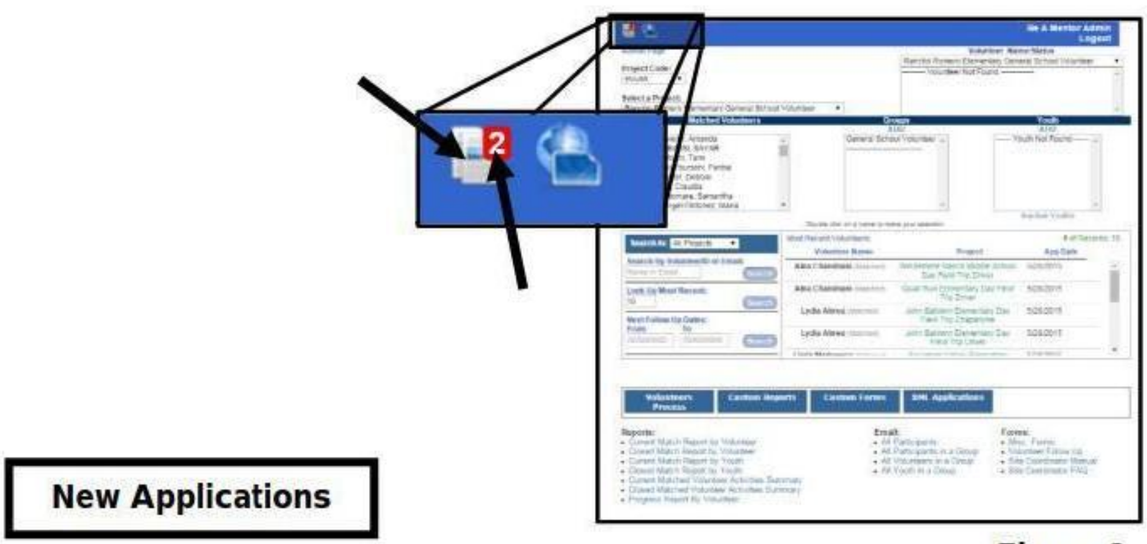
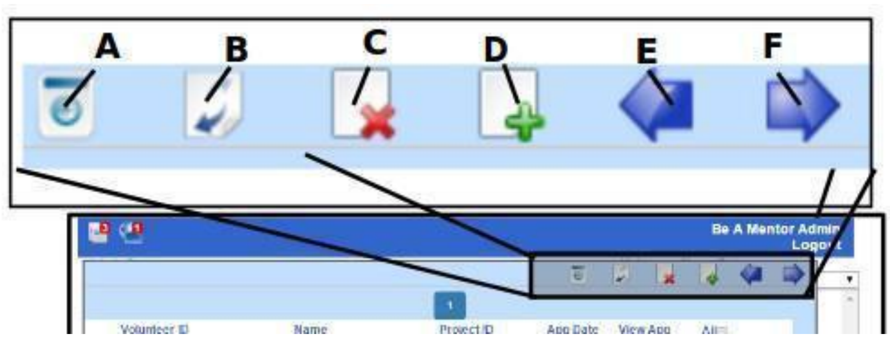


Figure 1

By clicking the “New Applications” icon, you will see the dropdown menu appear displaying all new applications.

New Applications Menu Functions (See Figure 3)



Search Temporary and Deleted Applications (A) –Go to where you can search for temporary or deleted applications. Temporary Applications that were only filled out and not submitted will be found here. Searching the deleted applications will allow you to recover and submit an application into the system. This is also known as Lost Souls.

Refresh New Applications List (B) –Allows you to update the list.
*Delete Selected Applications (*C) –Remove unwanted applications out of the system.
Approve Selected Applications (D) –Allows you to submit an application into the system.
View Previous 50 Applications (E) &View Next 50 Applications (F) –Be able to browse back and forth through applications in chunks of 50.

Types of New Applications If there are any issues with an application, a red note will appear underneath their Volunteer ID (See Figure 4). New Application Issues are:

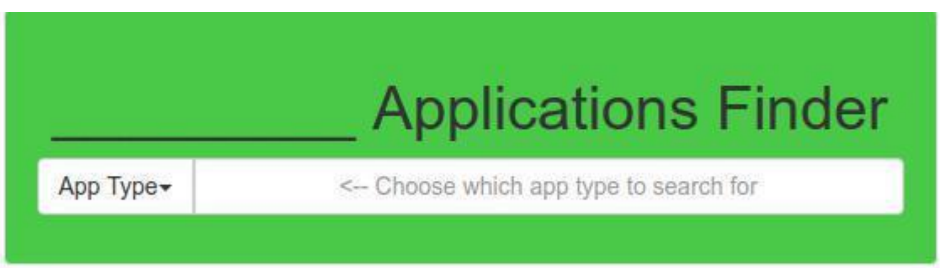
1. “Convicted of Crime”–Applicant has self-disclosed a crime.
2. “Convicted of a DUI”–Applicant has self-disclosed a DUI (Driving under the Influence).
3. “Under 18”–Applicant is under the age of 18 and a background check cannot be run.
4. “Duplicate Email in Database. Account may already exist.”– Applicant is using another applicant’s email in VMS or has made a second application

Figure 4

Note that sometimes a red note does not appear, be sure to review these applications carefully!

Lost souls

Clicking the “Search Temporary and Deleted Applications” button will open a function called “Lost souls” that will allow you search and recover applications:



Deleted applications have a button to return the application to the system. Temporary applications have the email and password created available that can be used to open and submit the application

Notifications: We receive notifications every time an applicant or volunteer makes a change to their file or uploads a document to their file for us to review. The picture below is an example of the type of notifications we receive.

	Volunteer	Message	Date Time
	ptest 2 PUSD	ProjectsManagement Volunteer 2PTEST has added new project(s) to his/her profile. (Alisal Elementary School General School Volunteer)	9/29/2017 2:17:47 PM
	Ptest 1 PUSD	VolunteerFiles Volunteer 1PTEST has uploaded document 'libertymutual_certificateofautomobileinsurance.pdf' with the type 'DriverLic'.	9/29/2017 2:07:36 PM
	ptest 2 PUSD	VolunteerFiles Volunteer 2PTEST has uploaded document 'keisha dl.pdf' with the type 'DriverLic'.	9/29/2017 1:43:25 PM
	jjjbobtest 0927-1 PUSD	Insurance Insurance updated [0927JJJBOBTEST]: Volunteer jjjbobtest 0927-1 has updated his/her insurance information	9/27/2017 8:47:52 AM
	jjjbobtest 0927-1 PUSD	DriverLicense Driver License updated [0927JJJBOBTEST]: Volunteer jjjbobtest 0927-1 has updated his/her Driver License	9/27/2017 8:46:25 AM
	Nanci Watson PUSD	DriverLicense Driver License updated [WATSONNANCI]: Volunteer Nanci Watson has updated his/her Driver License	9/21/2017 4:54:00 PM

The notifications page (inbox) will list the most recent unread notifications towards the top of the page in bold. Each notification will provide the volunteer name, project, message, date and time. Bolded notifications are ones that have not been worked.

Once a notification has been completed, you can either use the checkmark and the button at the top to mark the notification “read” or you can click the box itself, turning it to normal, non bolded type.

You can either process notifications by clicking the mentor’s name to open their *Volunteer Profile Page* or through *Volunteer Processing* (both described later in this manual)

Coordinator Menu Search Function:

Search will initially show the first 10 people who submitted applications that day; the first name being the first accepted application. You can modify the number of most recent applicants displayed by changing the number in the box labeled “Look Up Most Recent” which is outlined in red.

There are several ways to search for a person:

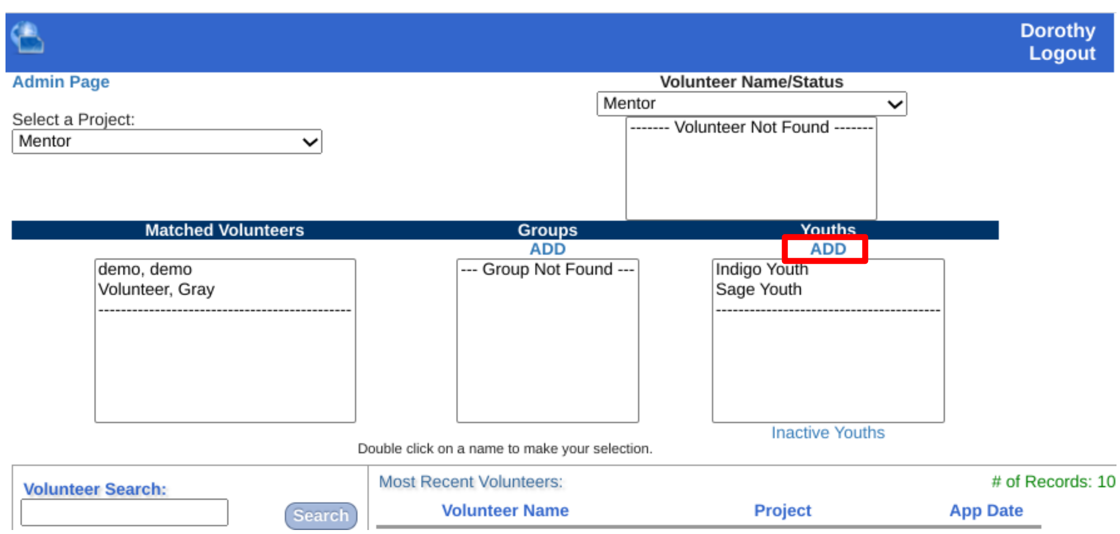
- First name
- Last name
- Last name with first initial (no spaces)
- Volunteer's email address
- Mentor ID

Email address is typically the best search option if you don't know the individual's MentorID.

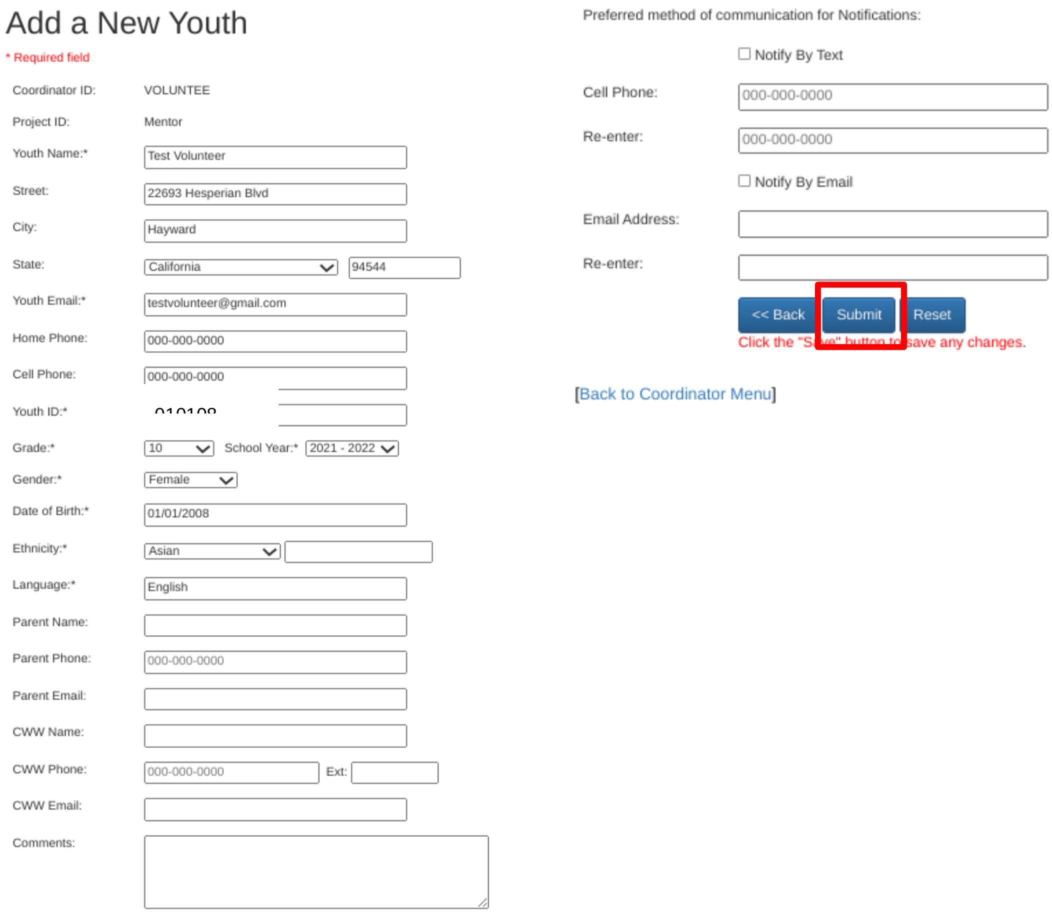
Add/Edit Youth

The following steps will show you how to add a youth in VMS so that they can be matched to a mentor.

Step 1: When logged in to VMS, you will click on the "ADD" option on the right hand side under "Youth" (see arrow below).



Step 2: You will be directed to the following page and here you will add all of the required information. You want to make sure you "submit" the information so that it may be saved.


Add a New Youth

* Required field

Coordinator ID:	VOLUNTEE
Project ID:	Mentor
Youth Name:*	Test Volunteer
Street:	22693 Hesperian Blvd
City:	Hayward
State:	California 94544
Youth Email:*	testvolunteer@gmail.com
Home Phone:	000-000-0000
Cell Phone:	000-000-0000
Youth ID:*	010108
Grade:*	10 School Year:* 2021 - 2022
Gender:*	Female
Date of Birth:*	01/01/2008
Ethnicity:*	Asian
Language:*	English
Parent Name:	
Parent Phone:	000-000-0000
Parent Email:	
CWW Name:	
CWW Phone:	000-000-0000 Ext:
CWW Email:	
Comments:	

Preferred method of communication for Notifications:

☐ Notify By Text

Cell Phone:	000-000-0000
Re-enter:	000-000-0000

☐ Notify By Email

Email Address:	
Re-enter:	

<< Back Submit Reset

Click the "Save" button to save any changes.

[Back to Coordinator Menu]

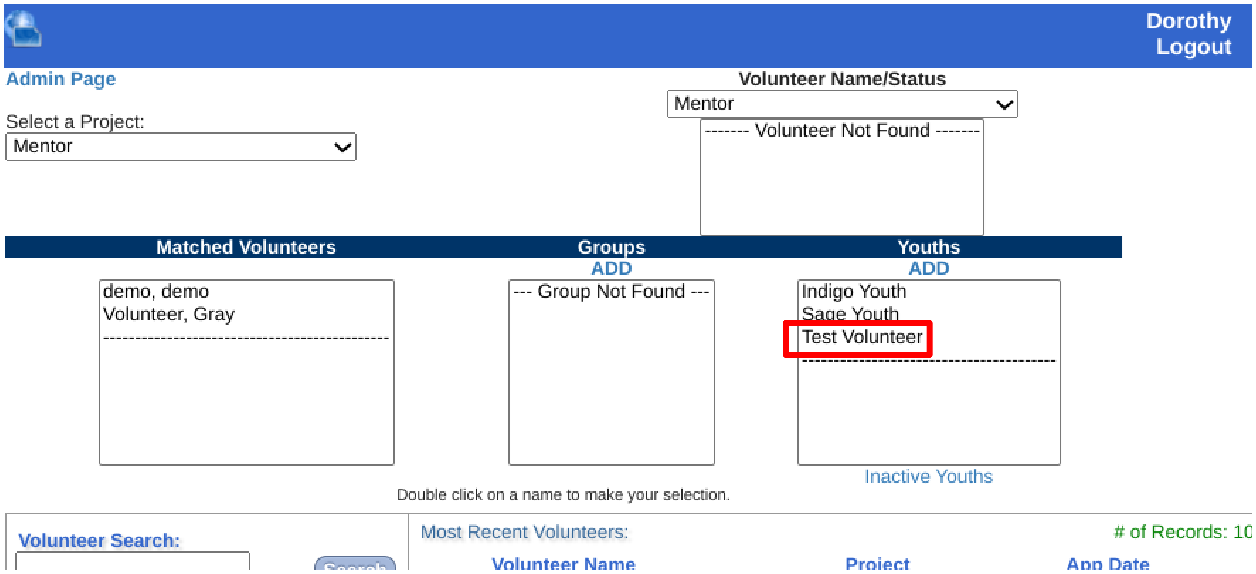
Step 3: After the youth information is submitted, you will be shown this confirmation page.

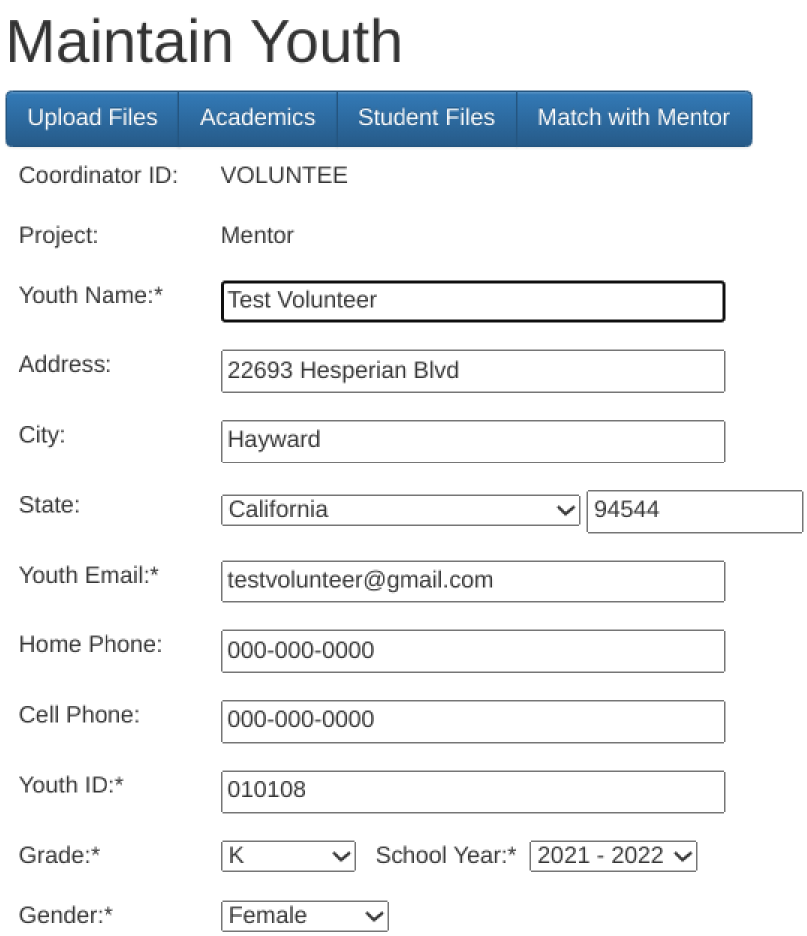
Student added successfully.

Coordinator ID:	VOLUNTEE
Project ID:	VOLDEMAMEN510-795-6488
Youth Name:	Test Volunteer
Street:	22693 Hesperian Blvd
City:	Hayward
State:	California
Zipcode:	94544
Student Email:	testvolunteer@gmail.com
Home Phone:	000-000-0000
Cell Phone:	000-000-0000
Youth ID:	010108
Grade:	K
School Year:	2021
Gender:	F
Date of Birth:	01/01/2008
Ethnicity:	Asian
Other Ethnicity:	
Language:	English
CWW Name:	
CWW Phone:	
CWW Email:	
Parent Name:	
Parent Phone:	
Parent Email:	
Comments:	
Notify By Text:	False
Text Number for Notification:	
Notify By Email:	False
Email for Notification:	

[Back to Coordinator Menu]

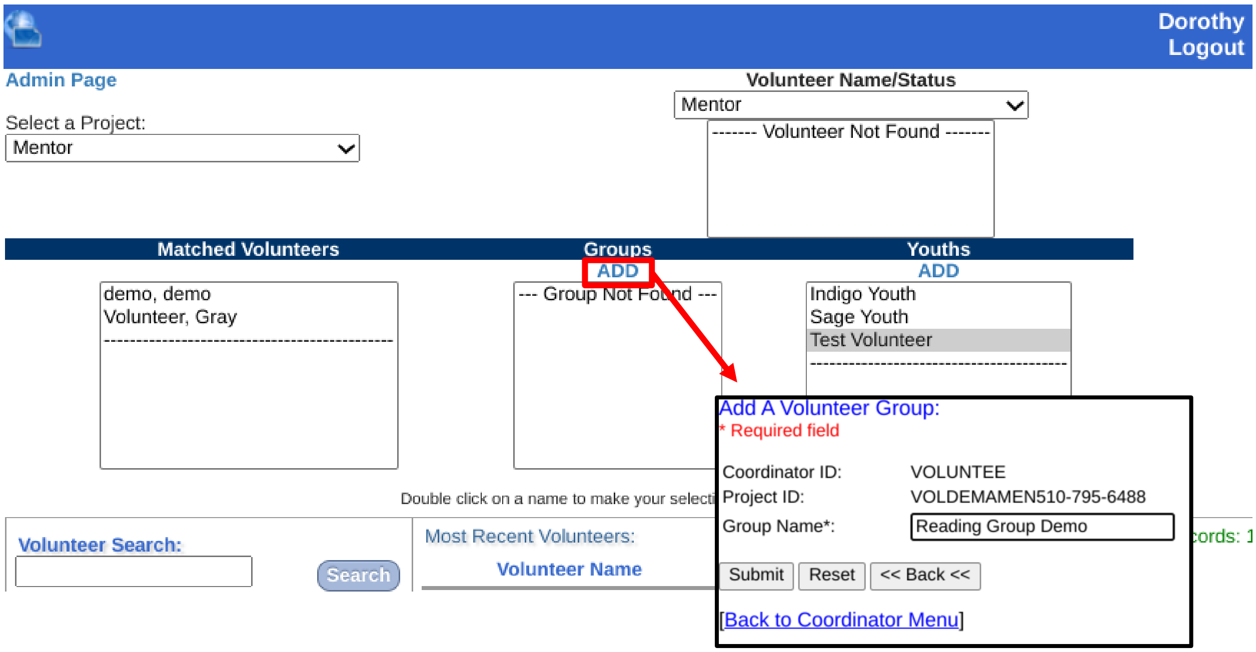
Step 4: On the confirmation page you will click on the option "Back to Coordinator Menu" (see arrow on image above), so that you may be taken to the main page once again. You will now be able to view the youth's name where it was initially added, and by clicking twice on the youth's name you will be directed to their profile.


Dorothy
Logout
Admin Page
Volunteer Name/Status
Mentor
------- Volunteer Not Found -------
Select a Project:
Mentor
Matched Volunteers
Groups
ADD
Youths
ADD
demo, demo
Volunteer, Gray
--- Group Not Found ---
Indigo Youth
Sage Youth
Test Volunteer
Inactive Youths
Double click on a name to make your selection.
Volunteer Search:
Most Recent Volunteers:
# of Records: 10
Volunteer Name
Project
App Date


Maintain Youth
Upload Files
Academics
Student Files
Match with Mentor
Coordinator ID:
VOLUNTEE
Project:
Mentor
Youth Name:*
Test Volunteer
Address:
22693 Hesperian Blvd
City:
Hayward
State:
California
94544
Youth Email:*
testvolunteer@gmail.com
Home Phone:
000-000-0000
Cell Phone:
000-000-0000
Youth ID:*
010108
Grade:*
K
School Year:*
2021 - 2022
Gender:*
Female

Group Management

You can also add a group to assign mentors to, such as “Reading Group” or “Math Group.” To create a new group, find the Groups column in the middle of the Coordinator Menu and then click “ADD.”



Fill out the group name, then hit “Submit”

You will get a confirmation like the one below:

Volunteer group added successfully.

Coordinator ID:	VOLUNTEE
Project ID:	VOLDEMAMEN510-795-6488
Group Name:	Reading Group Demo

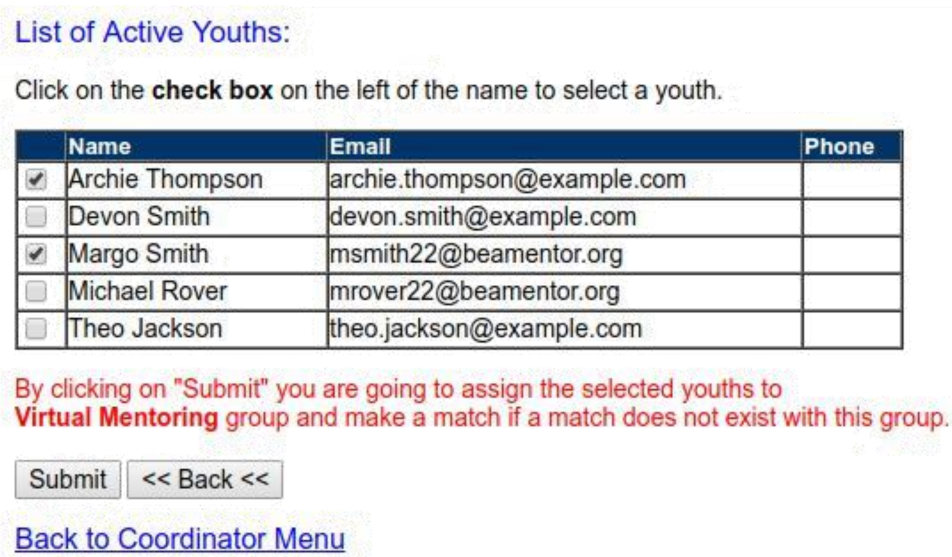
[Back to Coordinator Menu]

Mentors can be matched to a group much like they can to a youth (explained later in this manual under Assignments/Matches)

Once a group has at least one mentor matched to it, you can also assign youth to the group:

First, select the group name from the list, and then double click.

Select “Assign Youth” and select the names you want to assign to the group. Then click “submit”


List of Active Youths:

Click on the **check box** on the left of the name to select a youth.

	Name	Email	Phone
☑	Archie Thompson	archie.thompson@example.com	
☐	Devon Smith	devon.smith@example.com	
☑	Margo Smith	msmith22@beamentor.org	
☐	Michael Rover	mrover22@beamentor.org	
☐	Theo Jackson	theo.jackson@example.com	

By clicking on "Submit" you are going to assign the selected youths to **Virtual Mentoring** group and make a match if a match does not exist with this group.

Submit << Back <<

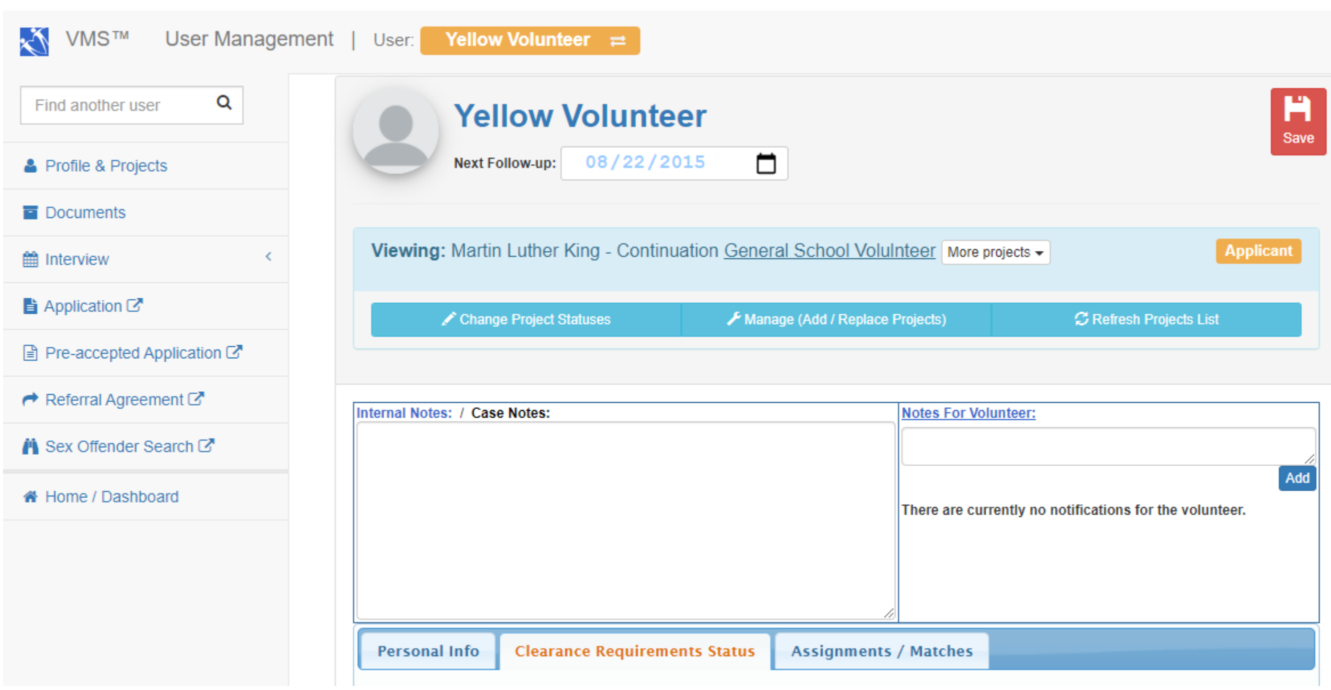
Back to Coordinator Menu

You will get a confirmation page like the below:

Next Follow up dates

Next Follow up dates are used to identify when an action or actions are needed to be addressed. The date is entered in the Next follow-up field on the Volunteer Profile page or when sending an email in the Volunteer Process. The date should correspond to an entry in the Internal or Case Notes field that describes the action to be taken.

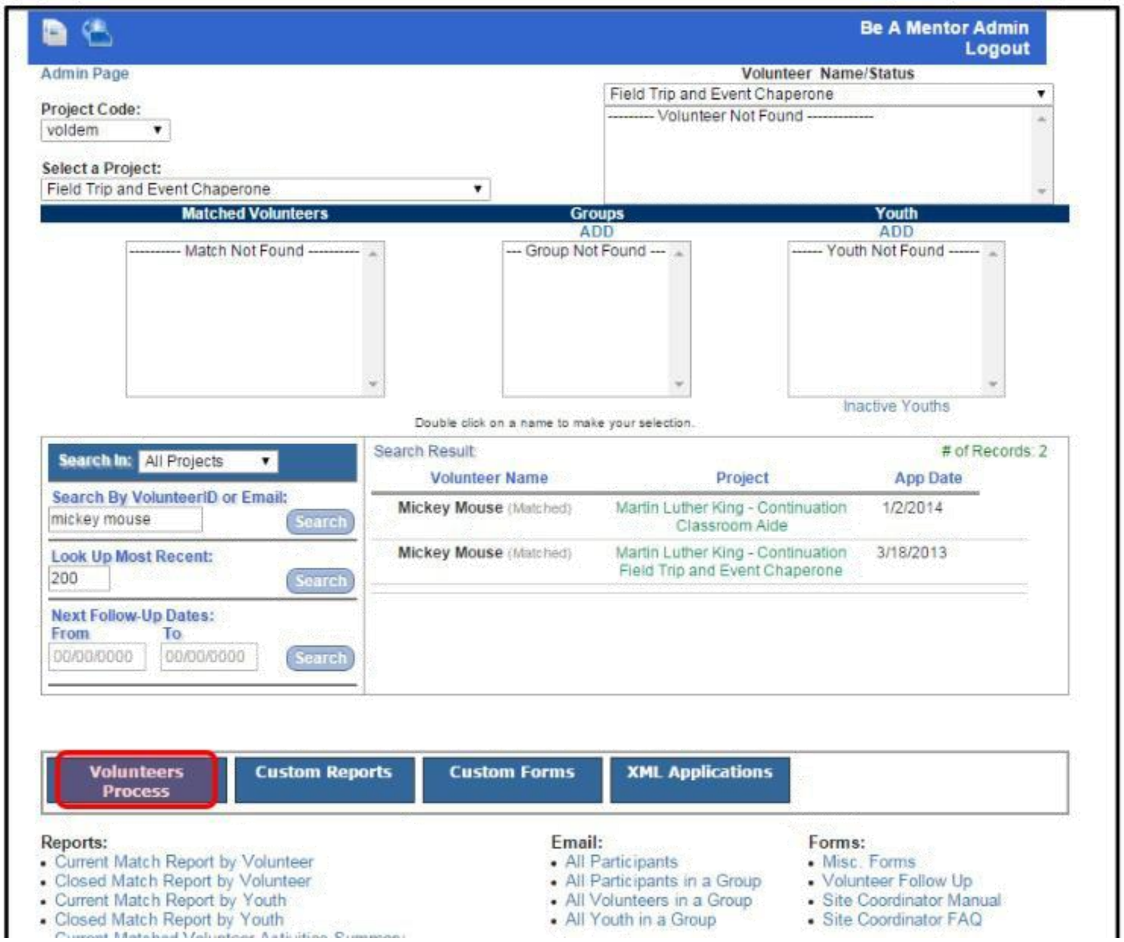
The next follow up date can be viewed and changed on the *Volunteer Profile Page*



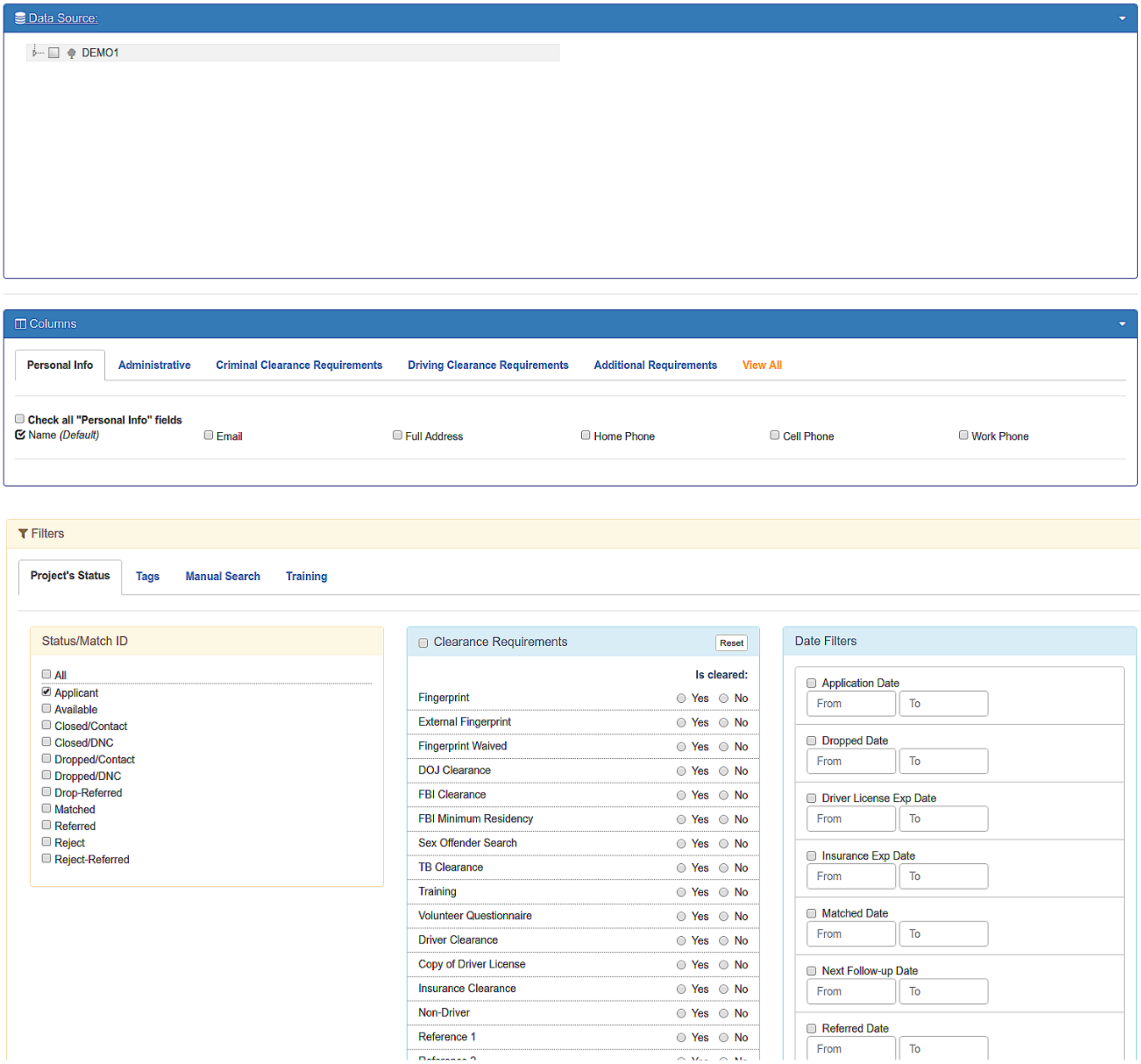
This is also where the date can be clicked and changed.

Volunteer Processing

Volunteers Process has many important functions. You can use it to check off requirements, clear a volunteer, make notes or send mass updates via email. It is important to follow up with applicants in a timely manner to see who is still interested and help those who may have difficulty with the process but are still committed. From the coordinator menu, at the bottom of the page click on the “Volunteers Process” button.



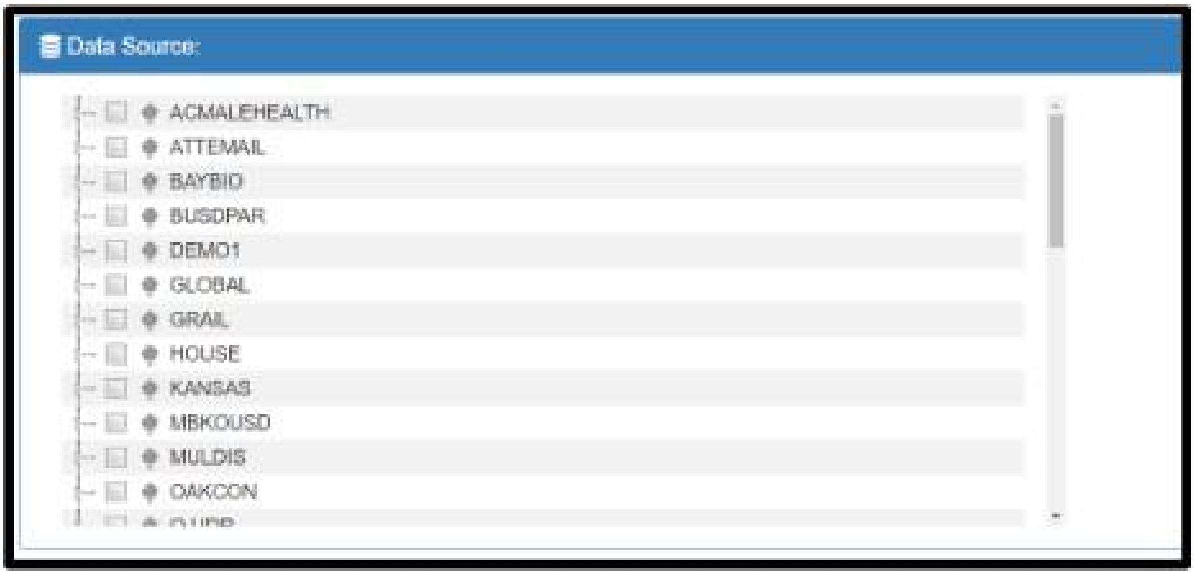
You are now in volunteer processing. Below are the ways you can refine your search. You can search by individual, by projects or specific criteria



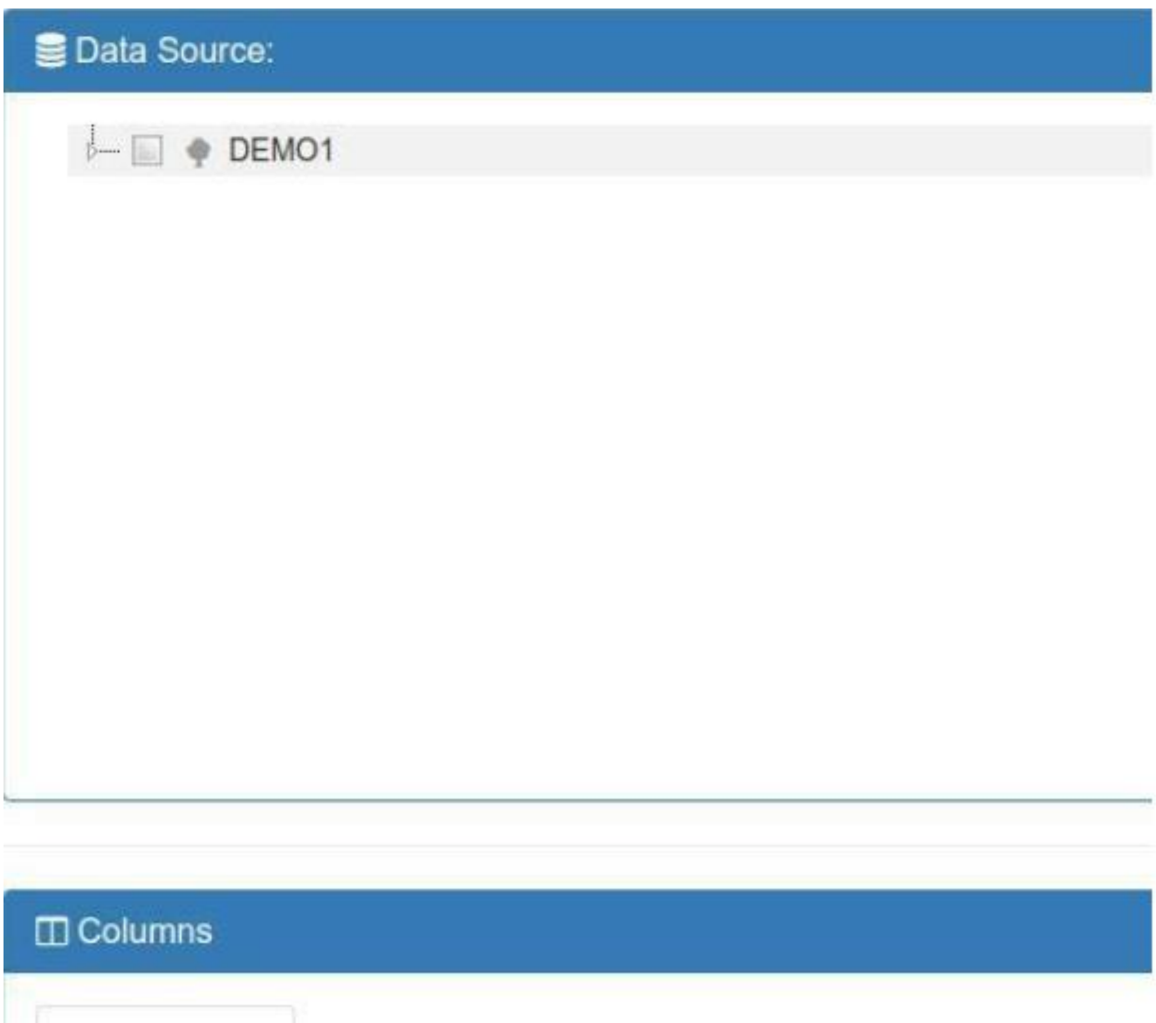
The Volunteer Processing page is broken down into several sections.

- Data Source
- Columns
- Filters

Data Source:

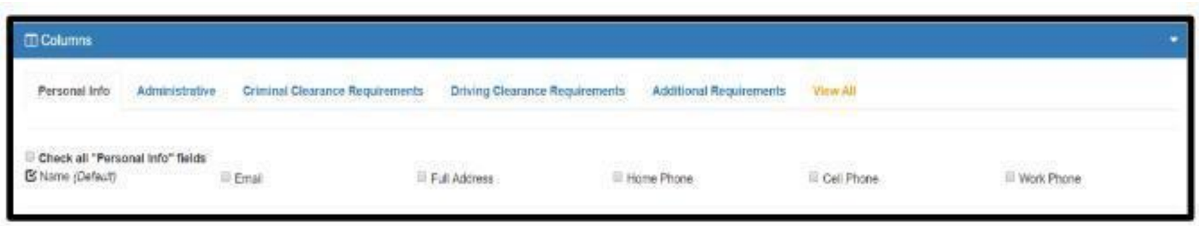


(Yours will look more like this)



The Data Source is located at the top left side of the page. You can select 1 or more specific projects that you would like to view for volunteer clearance. If you don't wish to view specific project information and you are processing clearances for all projects, you will leave all of the boxes unchecked.

Columns:



Columns are located directly below the Data Source information. We use the Columns to select the specific information you would like to view during the clearance process. Within the Columns section there are tabs. The tab that is selected in this example (and also by default) is the personal information tab. You can click the "Check All" box which will automatically select all of the boxes in this tab, or you can select only the boxes for the information you would like to see. Each tab will have a specific type of information. For Example: The Driving Clearance Tab will have boxes to check for Auto Insurance and Driver's License information.

Filters:

Filters are a way for you to be even more specific with the information you need to see to clear a volunteer. Some of the options you have using filters are:

- Project Status –These are used to view volunteers by the status of their project.
- Tag –These are used to view volunteers that are associated with specific tags.
- Manual Search –This is used to search for volunteers by name or email address.

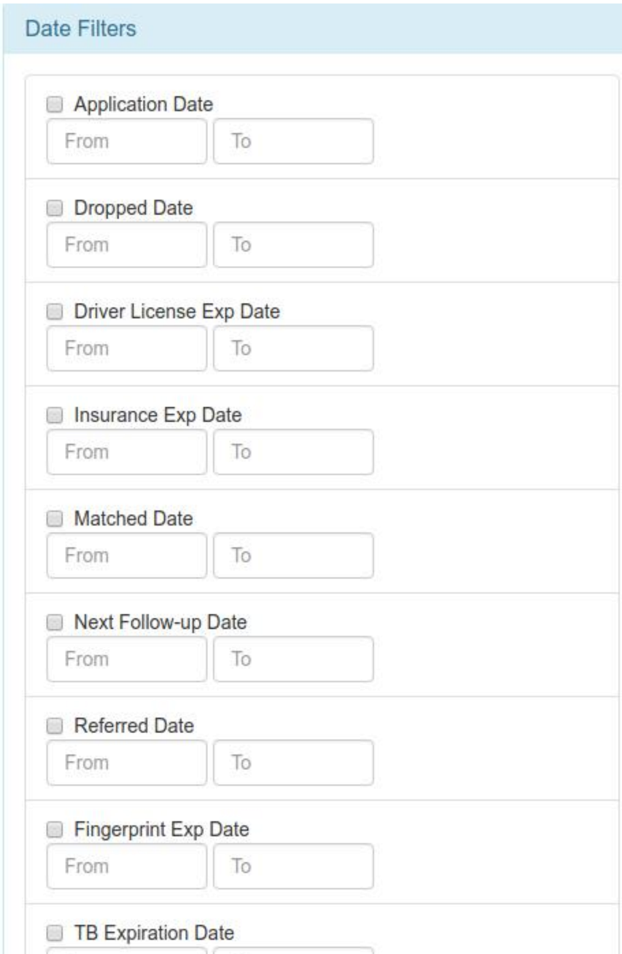
Training – Used to list volunteers who have signed up for training by date and training event.
At least one volunteer must have signed up for each activity for the specific date to appear.

Below are a list of radio buttons (found in the middle part of filters) that you can also use to change which mentors are displayed:

Fig. 28.2

Clicking "Yes" will display mentors who have met this requirement, "No" will display those who have not. Projects without it as a requirement will not be displayed

Below are Data Filters that you can also use to narrow your search results.

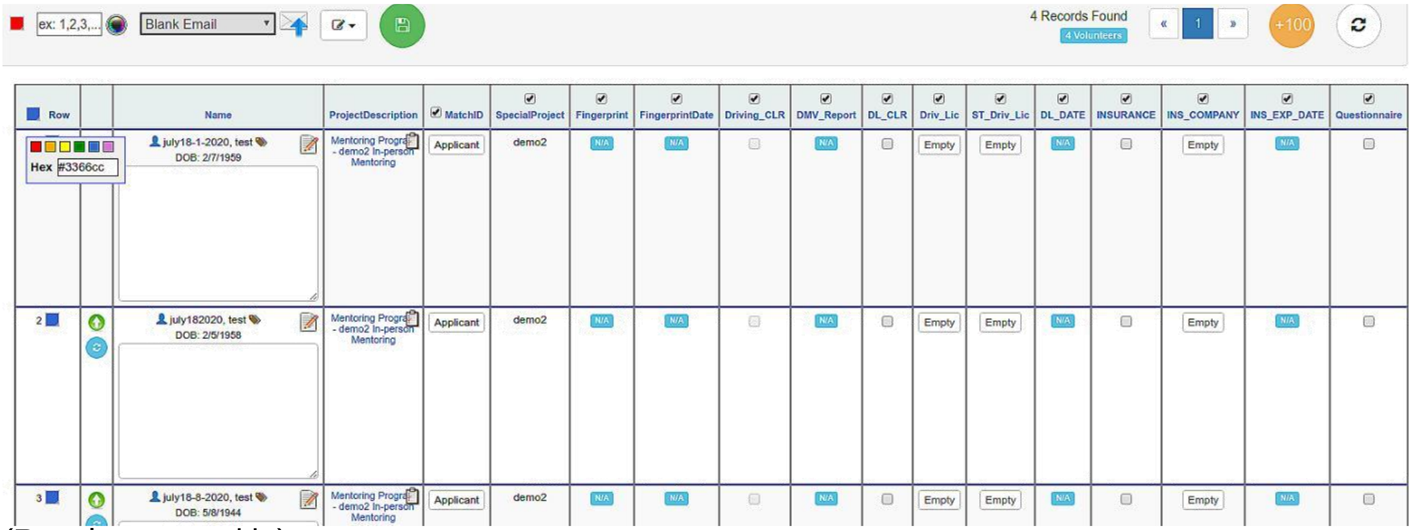


You can check to filter by "application date", and for example, only view mentors who have applied in the last two weeks, or more than a year ago, etc. You can use matched/referred date (depending on project) to display people who have met their requirements in the past week, month, six months. You could also use the "insurance expiration or driver's license expiration dates to see anyone who has been expired for more than a month or six months.

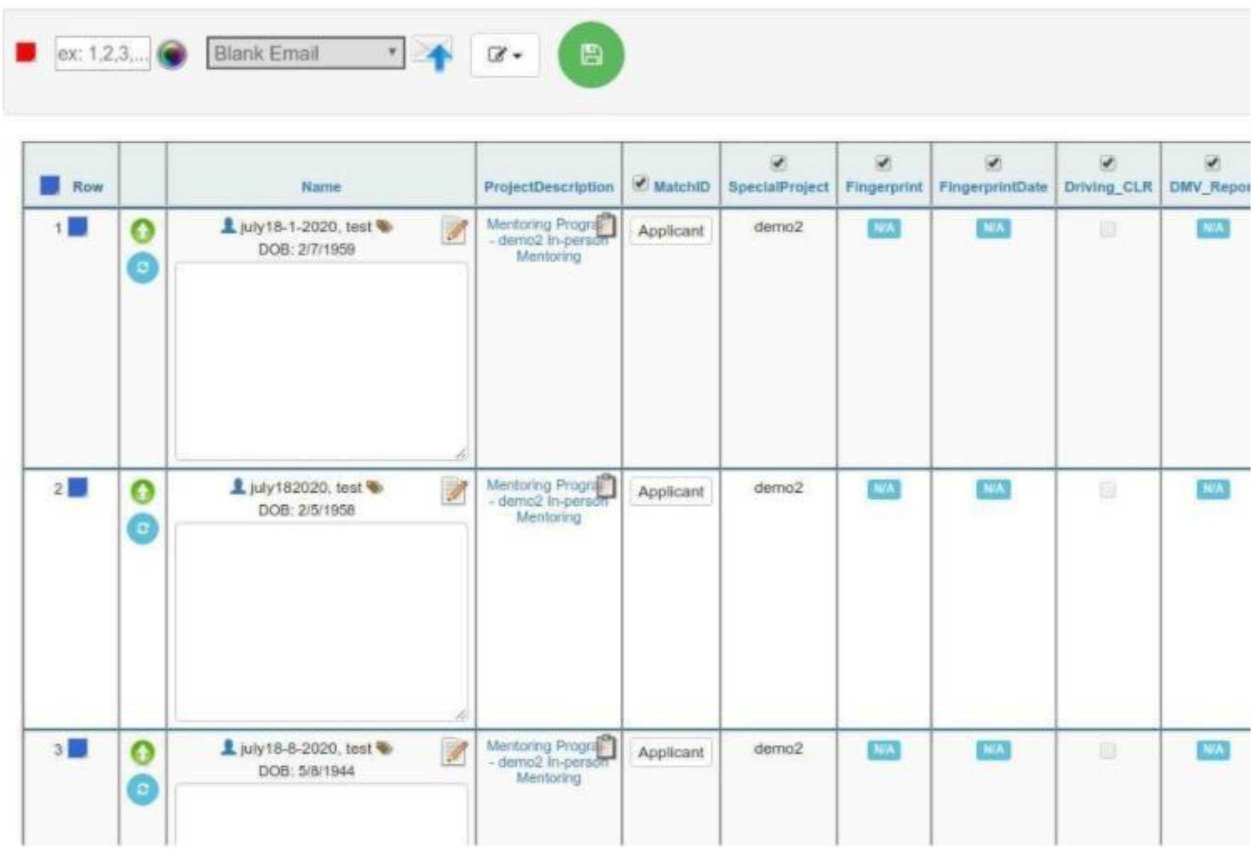
The Next Follow-up Date filter will display volunteers that have had a Follow-up set on their Volunteer Profile between the From and To dates specified. These can be used as a date for when you want to check in on a mentor, say, to see if they have any unmet clearance requirements, or if they have updated expired paperwork.

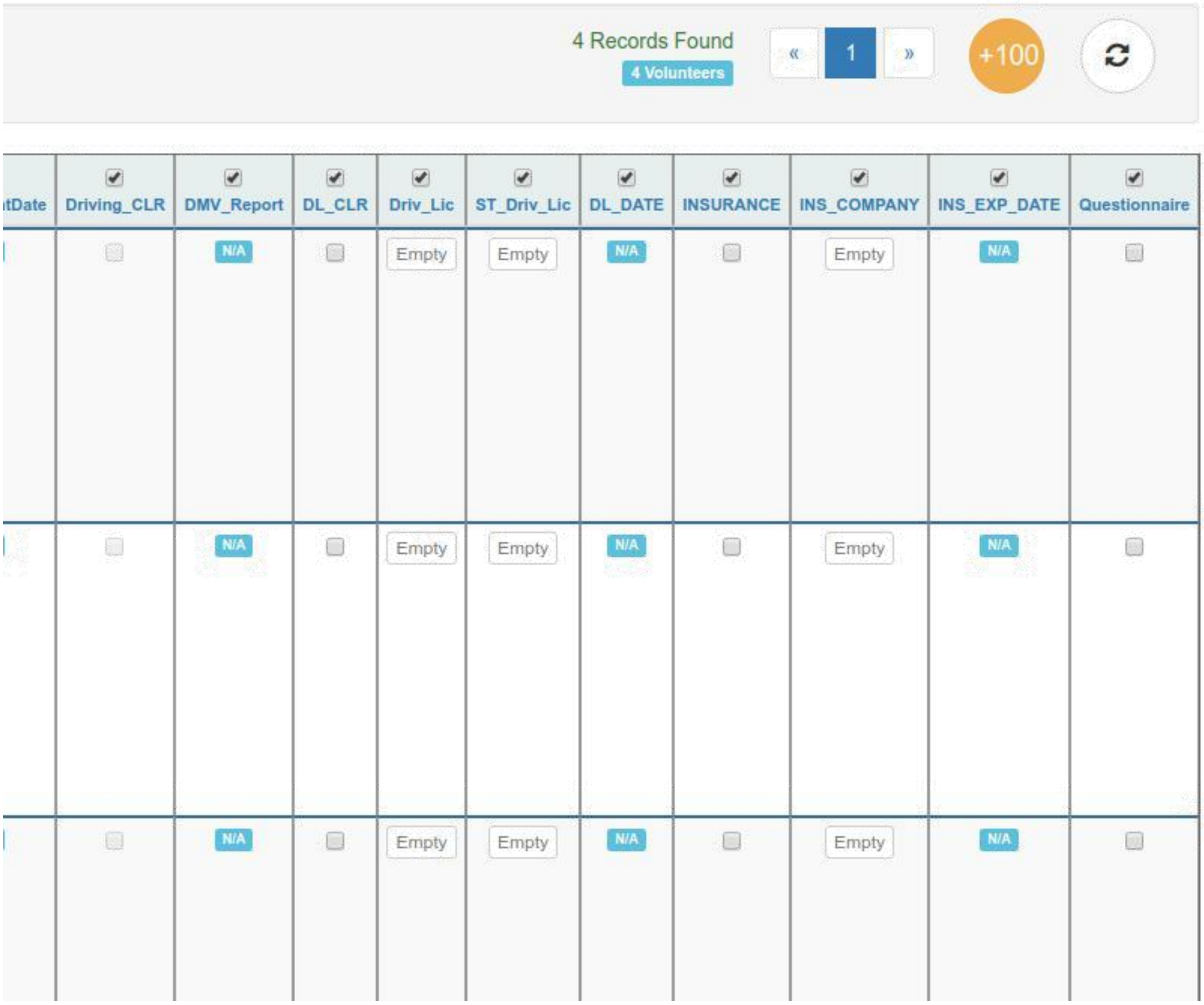
Once you have your filters set, click the big red "PLAY" button in the top righthand corner.

A list of mentors who fit the criteria you selected will be displayed:



(Results zoomed in)





Selecting Activities and sending emails within volunteer process:

One great use for the volunteer processing is the ability to send mass emails to multiple mentors at once. Below are the various parts of the selection process:

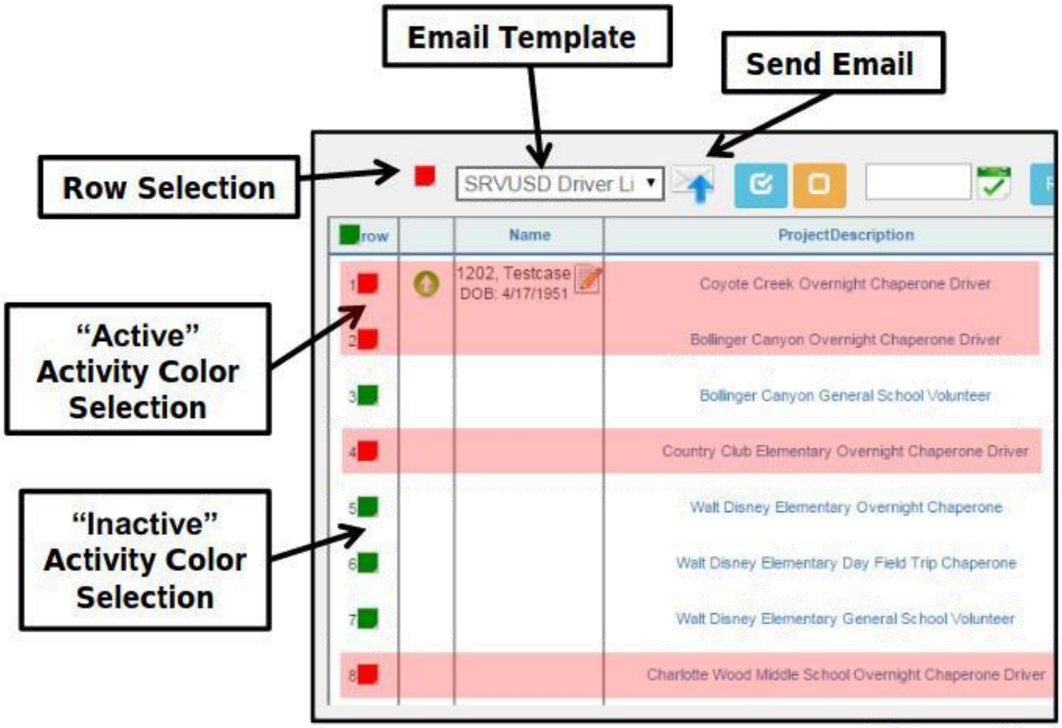


Figure 33

Select the volunteers who need the email sent to them by matching their color boxes to the one at the Row Selection at the top (click the one that says "row" will change the whole row to that color, and you can unselect ones who don't need it by changing their box to a different color).

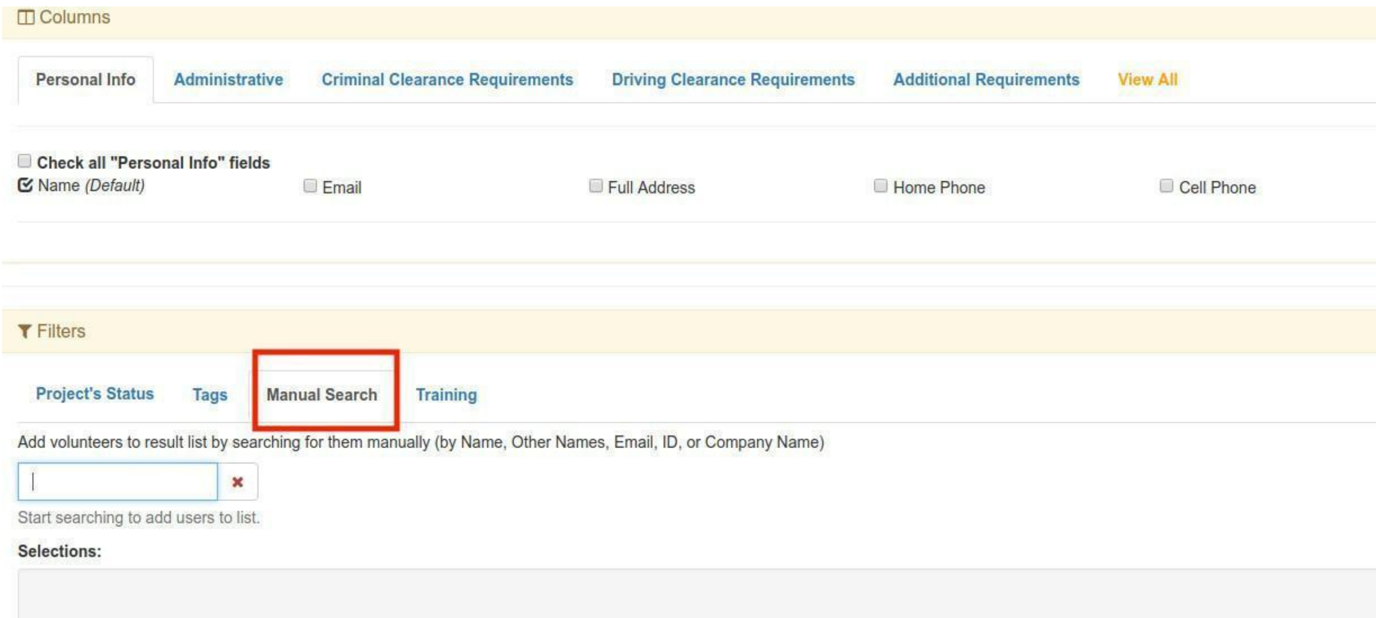
Once you have the volunteers selected, click the envelope with the UP arrow button.

Using Manual Search

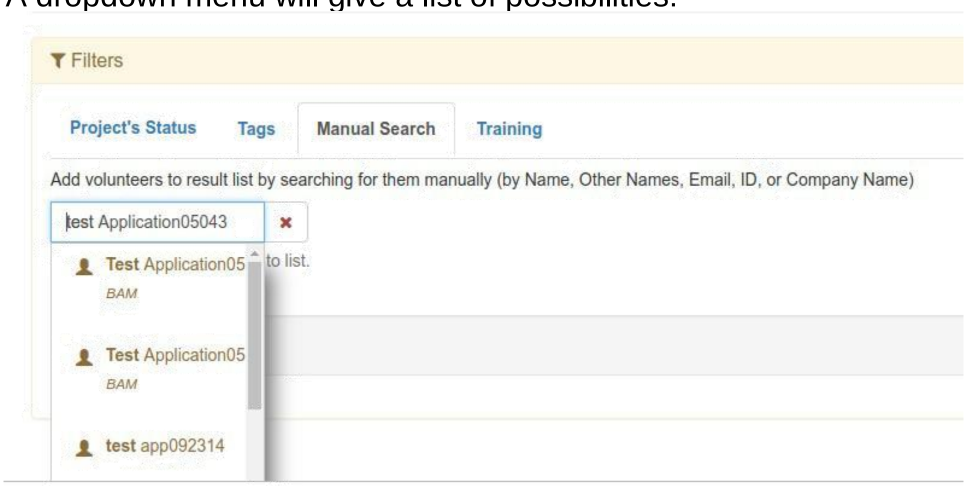
You can also use Volunteer Processing to pull up a single person, usual the Manual

Search

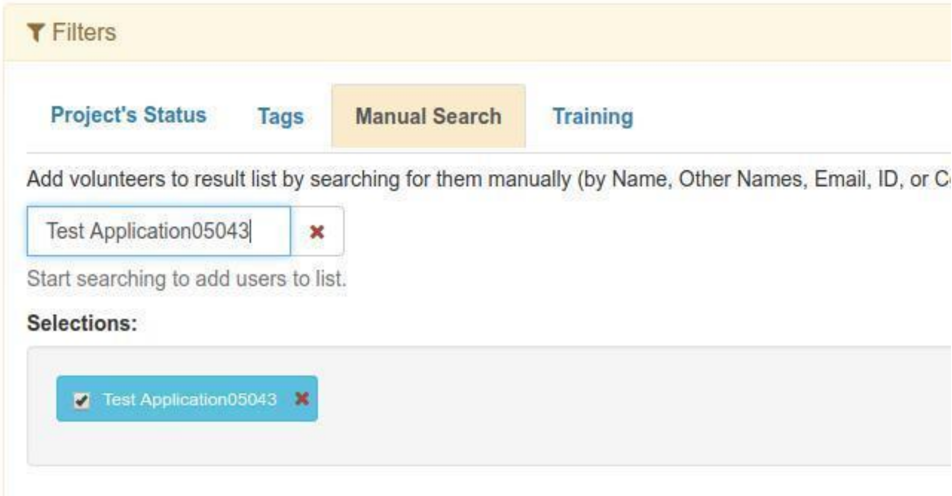
First, pick whatever settings you want displayed (driver's license, status, notes, etc) If the person whose name you select wouldn't fit into the set parameters, their name will bring up nothing. Best Practice is to select all statuses and no projects) Then select the tab under "Filters" that says "Manual Search". You can search by last name, last name/first name, email, or volunteerID



A dropdown menu will give a list of possibilities:



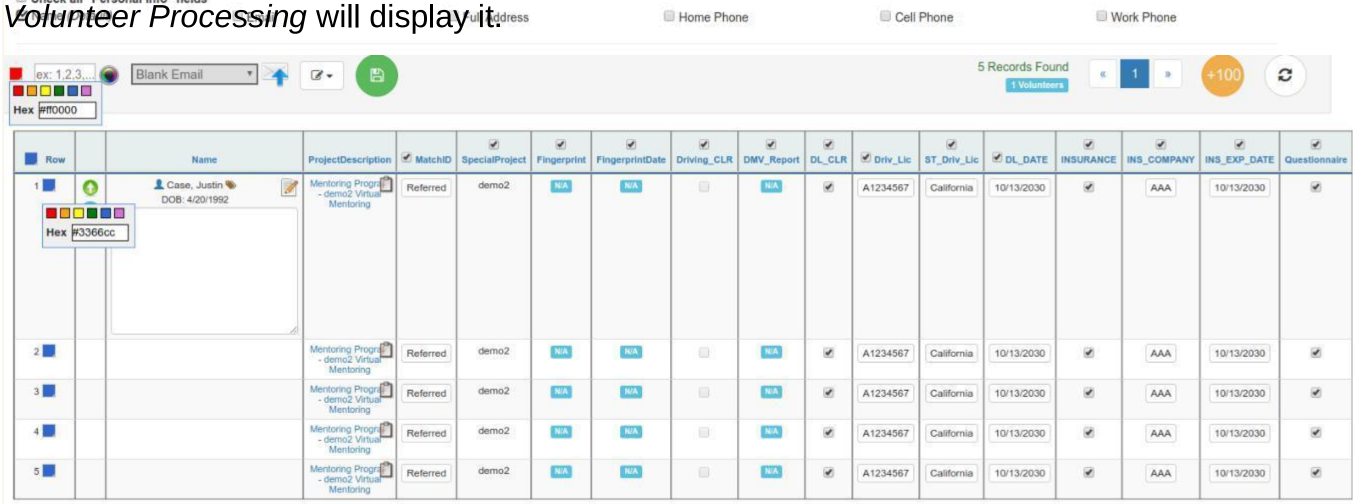
Select the person you want to view:



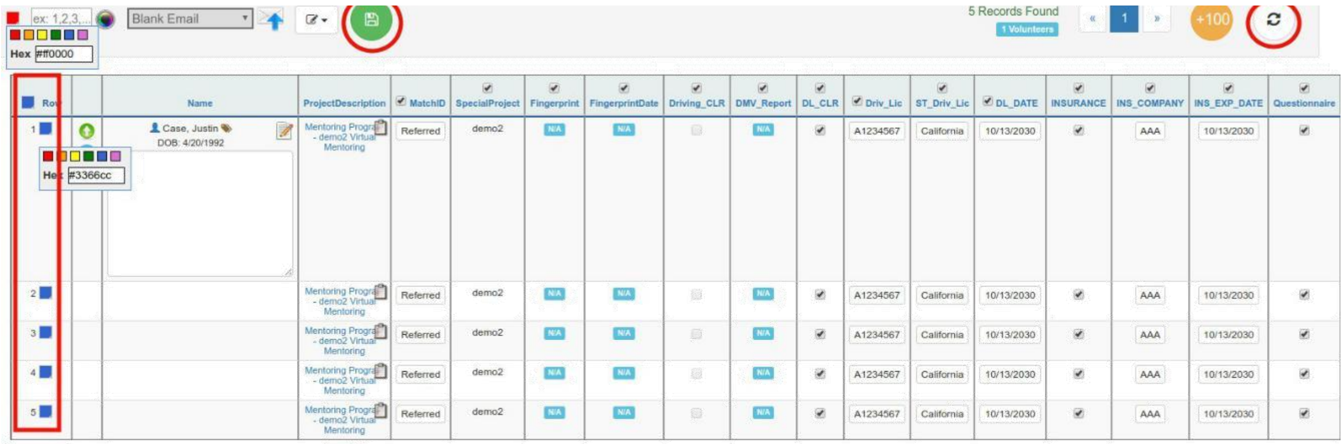
Then hit "PLAY" in the top right hand corner.

This is one way to process notifications: Set the columns so they look like this:

Then use manual search to search a name, here "Justin Case", and this is how *Volunteer Processing* will display it:



When processed like this, boxes can be checked and fields filled in, and then saved using the Color Blocks on the left, and the Big Green Save button. (The block will say "refresh required"- this can be done using the white refresh button next to the orange +100 button



Compose Email

After clicking the "send email" button you should now see the "Compose Email" tab open. (See Figure 34)

The email contains the following sections:

A. Recipients	**F. BCC**
B. Notes	**G. Reply-to**
C. Next Follow-Up Date	**H. Subject**
D. Initials	**I. Body**
E. Variables	**J. Attachments**

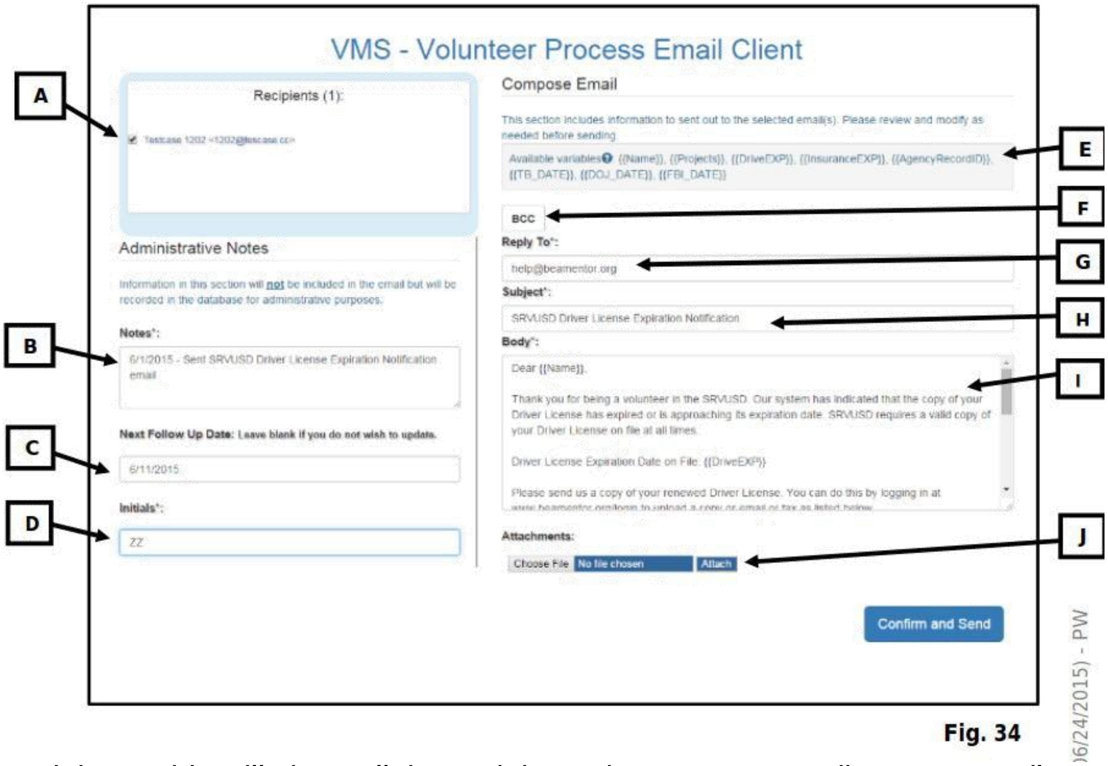


Fig. 34

Recipients This will show all the recipients that you are sending your email to. If you notice a recipient that shouldn't be on the list then just click on the box next to their name to uncheck it. Now that recipient will not be sent an email. This note will appear in the volunteer's "Internal Notes" in VMS. You can always add/change the note to provide additional details.

Next Follow-Up Date This is the recommended date that the volunteer should be followed up on. It is automatically updated to "10 days" after the date you sent the email. You can always add/change the follow-up date for certain circumstances. *Initials* Your initials will only be shown in the volunteer's notes. This is specifically for keeping of track of who sent what.

BCC (Blind Carbon Copy) This allows the sender to hide the person being BCC from the sender. Click on the "BCC" button. This will cause an internal drop down box to appear. (See Figure 35) To BCC the site coordinator then click on the check box next to "[to Project's Site Coordinators]." For any other recipients you would like to BCC then enter in their email address in the "Others" box. When entering multiple email address in the "Others Box" make sure to separate the emails with a comma. BCC Attachments Check "Include Attachments" if you would like the BBC recipient to receive the attachment.

Reply-to The automatic Reply-to email address is "help@beamentor.org". All response to your mass email or individual will go to BAM's help email inbox. For username or password please contact your administrator. Only change the reply-to for special circumstances.

Subject: The subject is the abbreviation of the body of your email. You will find most templates already have a subject prefilled for you. You can always add/change the subject to provide additional details. NOTE:50 characters is the max count for the subject.

Body: Once again most templates have this prefilled but you can always add/change the subject to provide additional details. Also, when creating a body template make use of the email variables (See next section).

Email Variables When a variable is placed within a “VMS -Volunteer Process Email Client” email, it will auto-fill in that space with the correlating information. Email variable options include:

- {{Name}} = Volunteer’s Full Name
- {{Projects}} = Selected activity/activities or project(s)
- {{DriveEXP}}= Driver License Expiration Date
- {{InsuranceEXP}}= Insurance Expiration Date
- {{AgencyRecordID}}= Automated Transaction Identifier (ATI) Number
- {{TB_DATE}}= Tuberculosis Expiration Date
- {{DOJ_DATE}}= Department of Justice Fingerprint Result Date
- {{FBI_DATE}}= Federal Bureau of Investigation Fingerprint Result Date

Sending Email: Review all of your email sections. Once you have verified that everything is correct then click on the “Confirm and Send” button. The email confirmation page should now appear. (See Figure 37.3)

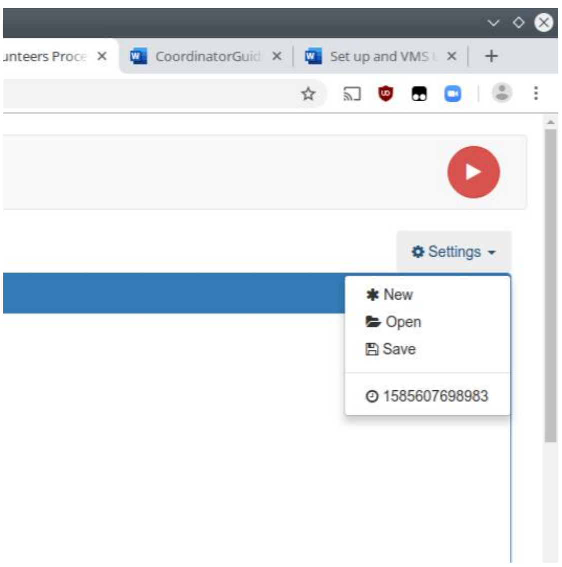
Fig. 37.3

Now you will get a real time confirmation message. Make sure to wait till all of emails have been sent before closing the window. You can click on “View Sent Email” to review what was just sent. Also displayed is the number of emails attempted, sent and failed to send. When an email failed to send, attempt to email that volunteer again. If it fails for a second time then contact the volunteer via telephone to confirm/update their email address.

Saving settings:

If you have a set of commonly used settings in Volunteer process (typical ones set when clearing notifications for instance, involves having all statuses checked as well as “internal notes”, “project code” and “status” under columns. This means you can see previous notes for the volunteer, all their projects, and all their project statuses) then you can save them and bring them up with a single click instead of having to redo many of them.

Once you have your desired settings selected, finding the “settings” button in the right-hand corner below the Play button, and click it to bring up a dropdown:



First select “*new*” this will open up a new spot to save the settings to

Then select “*save*”. Your settings will be saved with a long number string, so make sure you know which ones are which. Note that saved settings are saved to your local machine, not your login!

Custom reports

We use custom reports to pull specific information together about our volunteers. We have several reports that we can choose from. Each report will have different information for you to select based on what you would like to see. The Custom Reports button is found on the Coordinator Menu, right next to the Volunteer Process button.

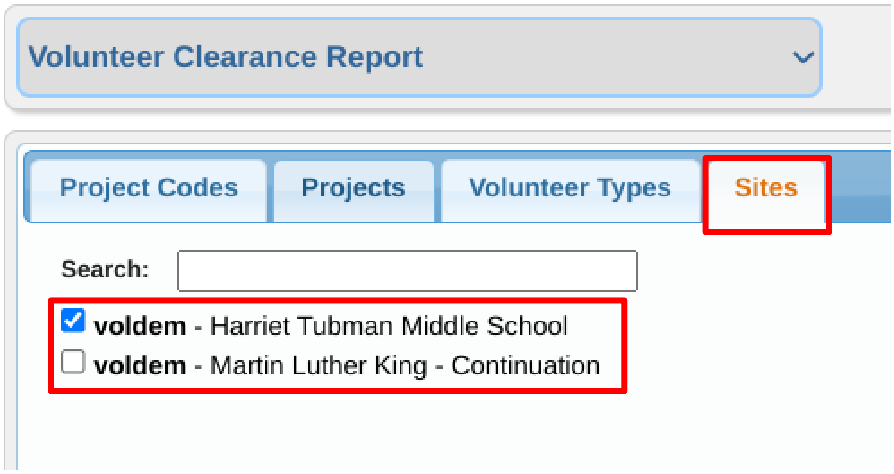
Below are the steps on how to generate a report:

Step 1. Select the Custom Reports tab.

Step 2. Select Volunteer Clearance Report from the drop-down menu. Under the Sites tab select your site as demonstrated on the image below.

Step 3. The next step is to select the fields you wish to view on your report.

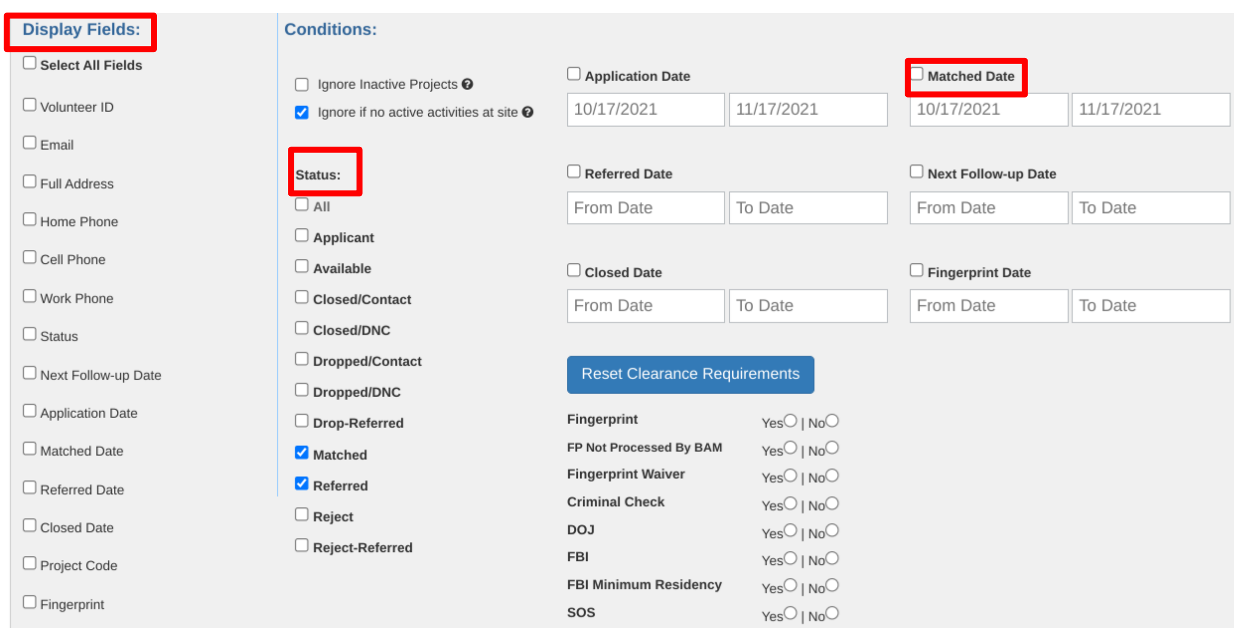
Reports



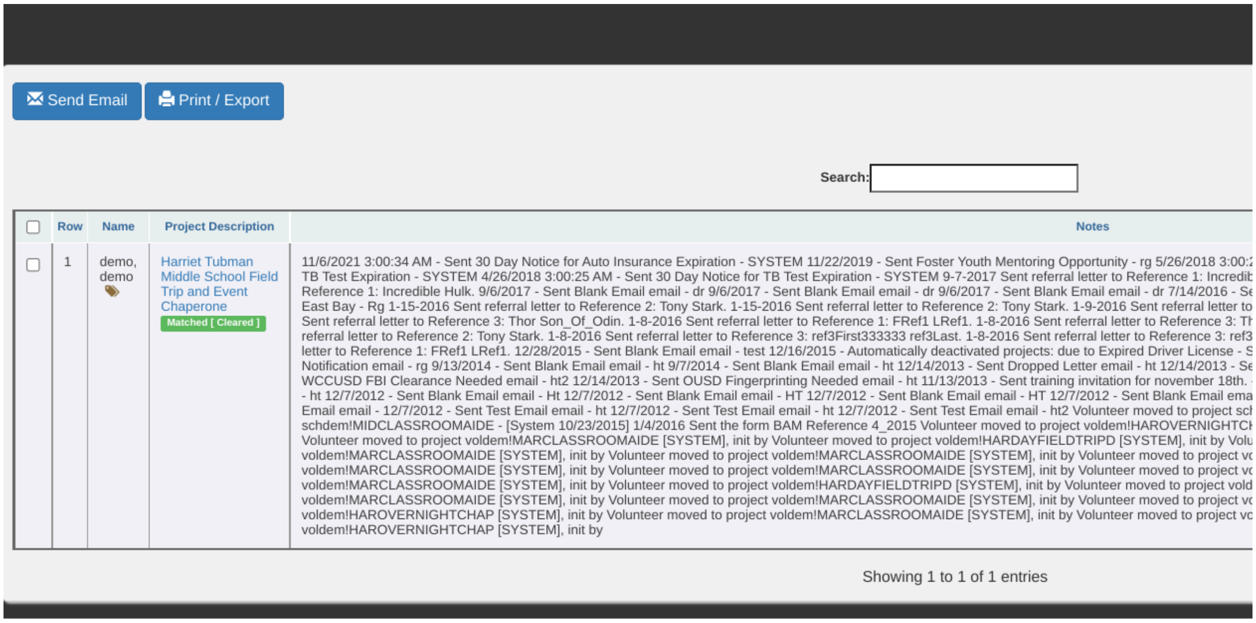
Under Display Fields (see below) you have the option to select Internal Notes to display the Notes field that contains clearance related activities when the report is generated. This will aid in the determination of which volunteers need to be closed.

Under Status (see below) you may select Matched to view matched volunteers you wish to close.

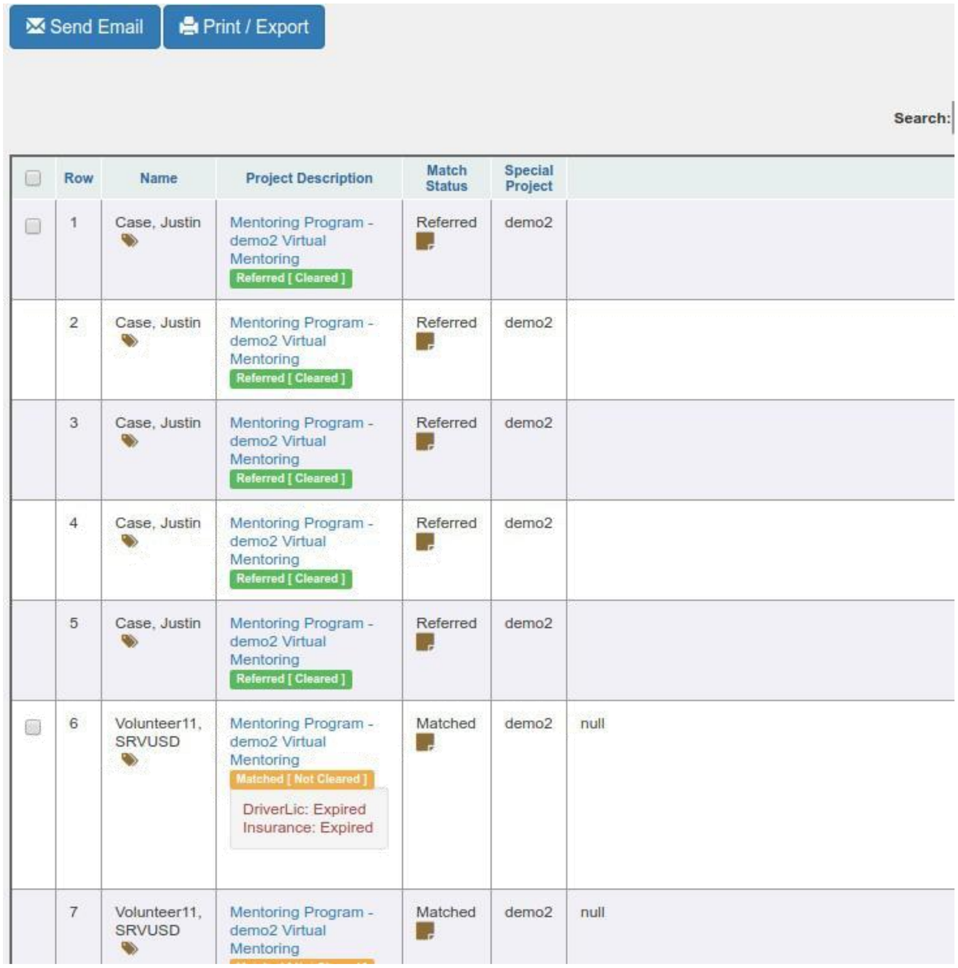
You also have the option to select the Matched Date by specific dates. In the image below we demonstrate a search for individuals matched within the last year (you may leave the date fields blank if you wish to view all volunteers with a matched status). Then scroll to the top upper right of the screen and select the blue Generate Report button.



Step 4. Once you generate your report it will look like the image below that shows any activity having to do with the volunteer account under the Notes section. The report system is set up so that a volunteer's name is listed separately for each activity in their file.



Once the report is generated, any expired information (DL, INS) will be shown in **red**)



	Row	Name	Project Description	Match Status	Special Project	
	1	Case, Justin	Mentoring Program - demo2 Virtual Mentoring Referred [Cleared]	Referred	demo2	
	2	Case, Justin	Mentoring Program - demo2 Virtual Mentoring Referred [Cleared]	Referred	demo2	
	3	Case, Justin	Mentoring Program - demo2 Virtual Mentoring Referred [Cleared]	Referred	demo2	
	4	Case, Justin	Mentoring Program - demo2 Virtual Mentoring Referred [Cleared]	Referred	demo2	
	5	Case, Justin	Mentoring Program - demo2 Virtual Mentoring Referred [Cleared]	Referred	demo2	
	6	Volunteer11, SRVUSD	Mentoring Program - demo2 Virtual Mentoring Matched [Not Cleared] DriverLic: Expired Insurance: Expired	Matched	demo2	null
	7	Volunteer11, SRVUSD	Mentoring Program - demo2 Virtual Mentoring	Matched	demo2	null

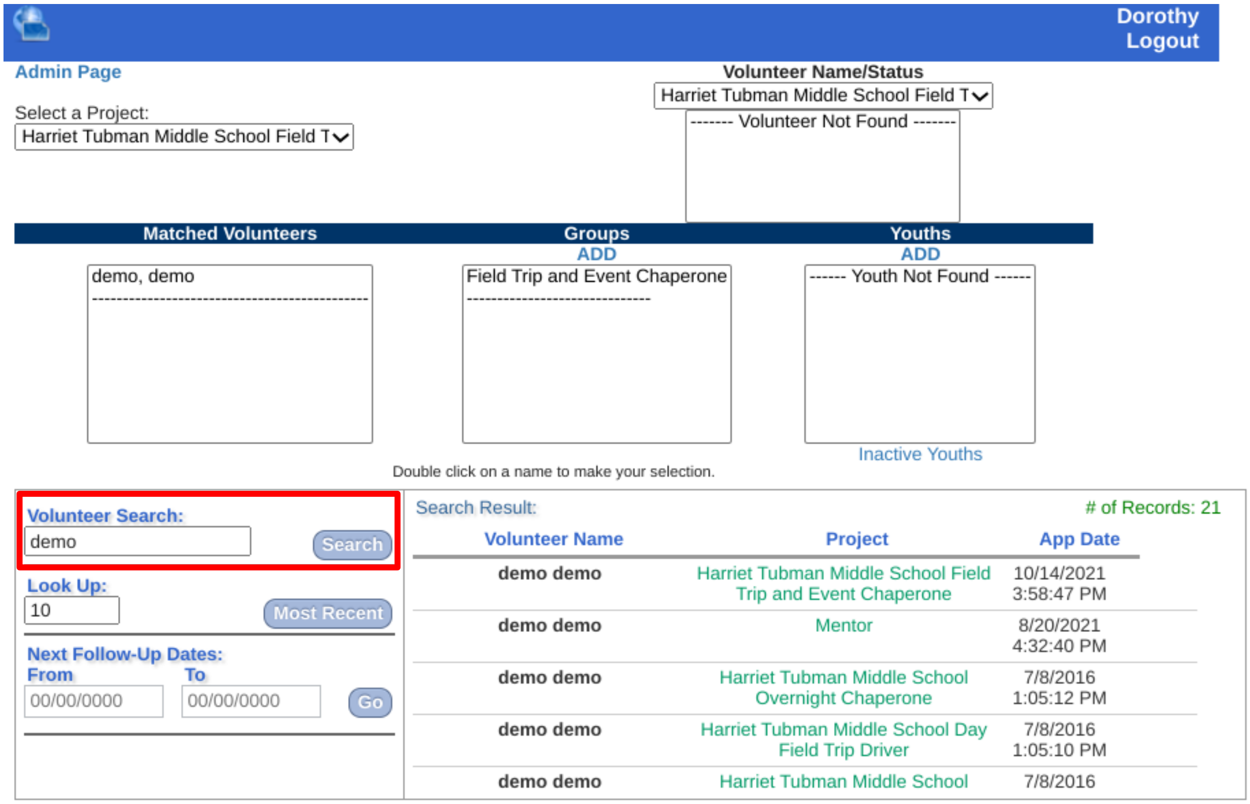
If the options for a Custom Report seem familiar, it’s because the options are very similar to the one used within Volunteer Processing.

Volunteer Profile Page

Each volunteer has their own profile page. The steps to get to it are as follows:

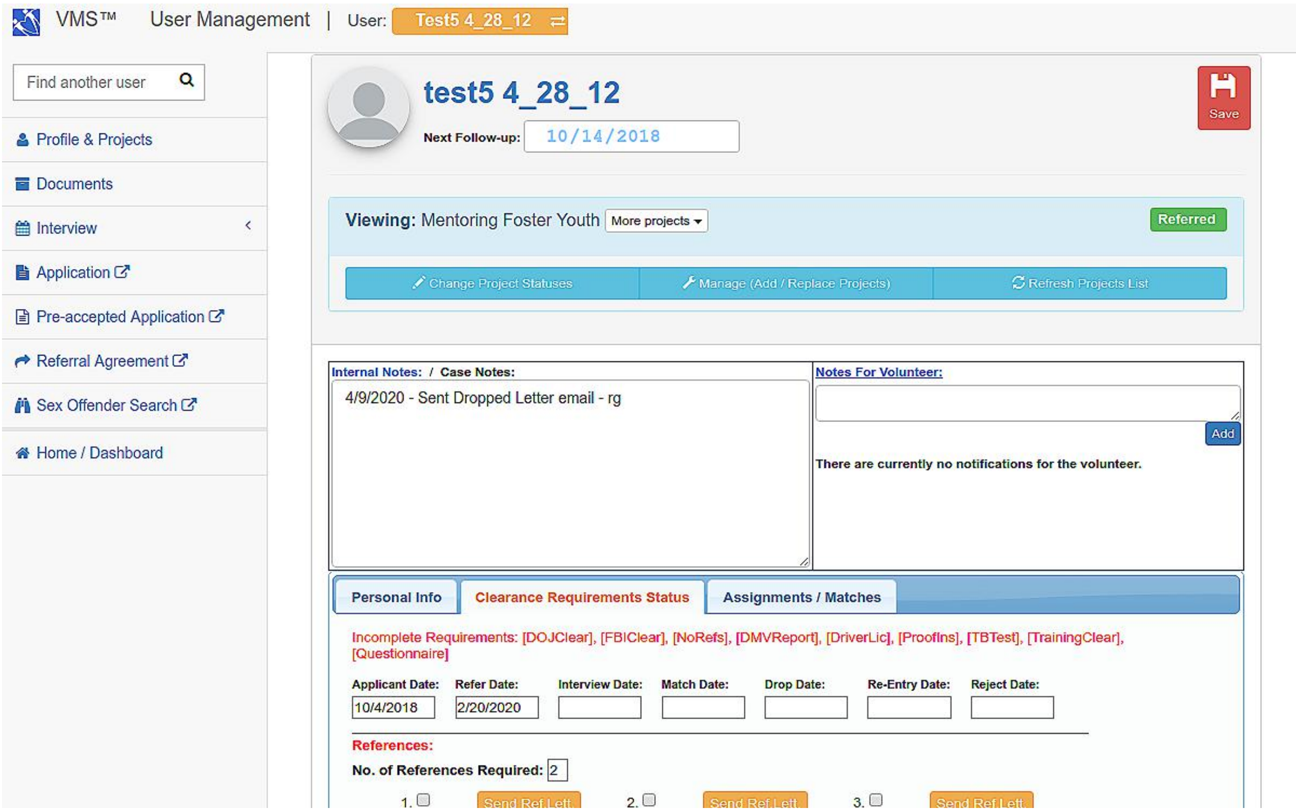
Step 1: From the Coordinator menu search for the volunteer using the “Volunteer Search” box.

Step 2: Once you have the correct volunteer/mentor, double click the name in the search results to open the Profile Page.



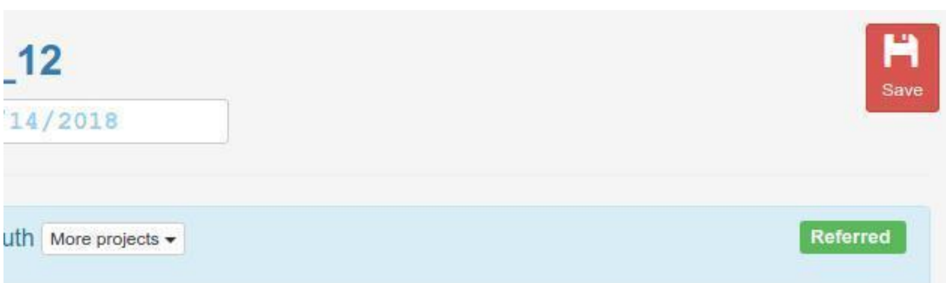
If you bring up a volunteer using Manual Search inside Volunteer Process, you can also click the project to open the Profile Page

The profile page looks like this:

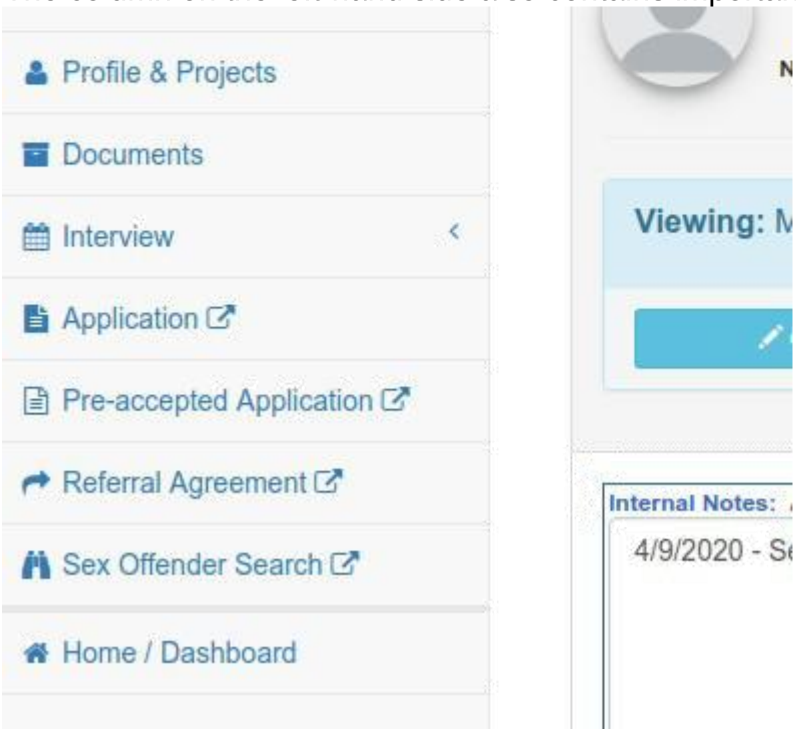


And has many different parts and features.

Most importantly, the **Save** button in the upper right-hand corner:



The column on the left-hand side also contains important attributes:



Profile and Projects is the default view for the Profile Page, it is what comes up when you double click a name.

Documents: clicking on this will open up the Volunteer Documents page in a new tab in your browser. Any documents uploaded by the volunteer, coordinator or Be A Mentor will be show, and can be viewed or downloaded

You want to verify that the volunteer has uploaded the correct document(s)and then "check-off" their requirements that it fulfilled. "Documents" is a way that a coordinator can upload files too.

Applications/Pre-accepted Application:

Contains approved volunteer application and is maintained by an administrator. Information on this page should be up-to-date

The information on this page is from the original application entered by the volunteer before there were approved and maintained by an administrator. The information shown on this page may be outdated

Referral Agreement: This form is need when a person is going to match a mentor with a mentee. It's letting you know that the volunteer has passed screening but has not yet be determined for volunteering. Checking "I Understand" means you have accepted the responsibility for reviewing the case file provided electronically, to interviewing this perspective volunteer, and deciding whether or not to match this person with a youth.

An explanation of statuses:

The color block under the Save button is a volunteer’s status. Everyone enters the system as an orange Applicant.

Definitions of Statuses:

1."Applicant"-Requirements have not been fulfilled.

2."Available"-

*School Volunteer: Previously matched volunteer who has moved to a different school

*Mentor Volunteer: Previously matched mentor who’s match has been closed as is available for another one.

3. "Closed/Contact"-Volunteer has met all requirements and finished a match. Also, they are no longer volunteering for that activity, school, or project. Match has been closed.

4. "Closed/DNC"-Volunteer has met all requirements and finished a match. They no longer want to volunteer for that activity, school, or project. The volunteer does NOT wish to be contacted again. Match has been closed.

5. "Dropped/Contact" - Volunteer has not met requirements and is unresponsive.

6. "Dropped/DNC"- Volunteer has not met requirements and does not want to be contacted, has moved, and/or is a duplicate account/activity.

7. "Drop-Referred"-Do not use this status unless given instruction from the Director.

8. "Matched" -Volunteer has met all activity/project requirements on that date and has been matched to a group or individual.

9. "Referred"

*School Volunteer: has met all activity/project requirements on that date.

*Mentor Volunteer: volunteer has met requirements and ready to be matched with a youth. (Waiting for action from a coordinator)

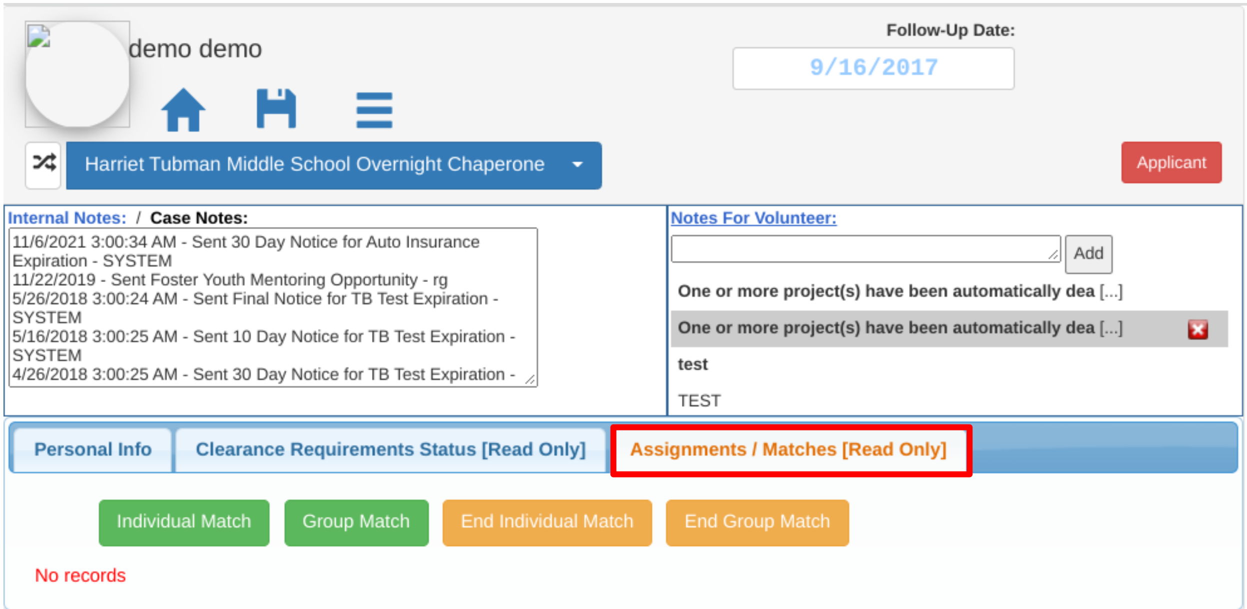
10. "Reject"- Volunteer does NOT meet project or activity standards, or has failed the background clearance. Cannot be allowed to volunteer for any project/activity until the status is corrected by an executive admin or director

11."Reject-Referred"-Cannot volunteer at any of BAM projects/Activities since they do not meet BAM standards. However, volunteer is referred at the customer's request

Assignments/Matches

On a volunteer's Profile Page you can also view matches

First, click the "assignments/matches" tab



Matching a Volunteer or Mentor There are two ways to Match a volunteer/mentor, to a group or to a specific youth (youth most likely for mentoring programs). It can be done through the Volunteer Profile Page or through Volunteers Process.

For a mentor to be "Matched", they need to have completed all requirements and their status changed to Referred. You can match a volunteer to a group project, a mentor with an individual youth from the same project or match a mentor with a youth from a different project.

Match a Volunteer to a Group This can be done through the Profile Page. From the follow up screen, select the Assignments/Matches tab and click "Group Match":

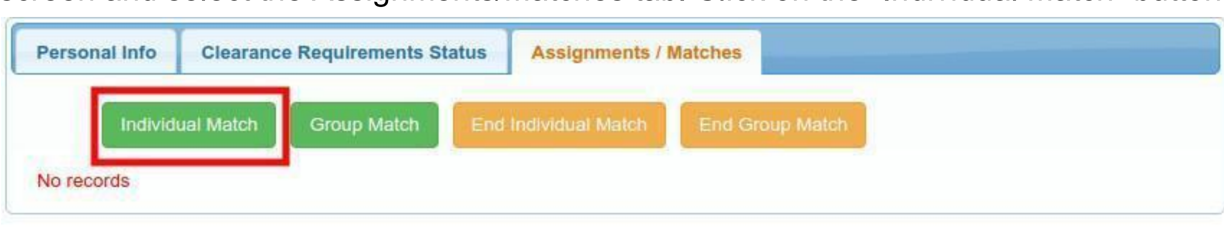
On this next screen, you want to select the Group, enter the date and click "Submit".

The following message indicates a successful submission.

You can verify the match by going back to the Volunteer Profile page and looking at the Assignments/Matches tab.

Match a Mentor with an Individual Youth

Similar to matching a volunteer with a group, you want to go to the Mentor's follow up screen and select the Assignments/Matches tab. Click on the "Individual Match" button.



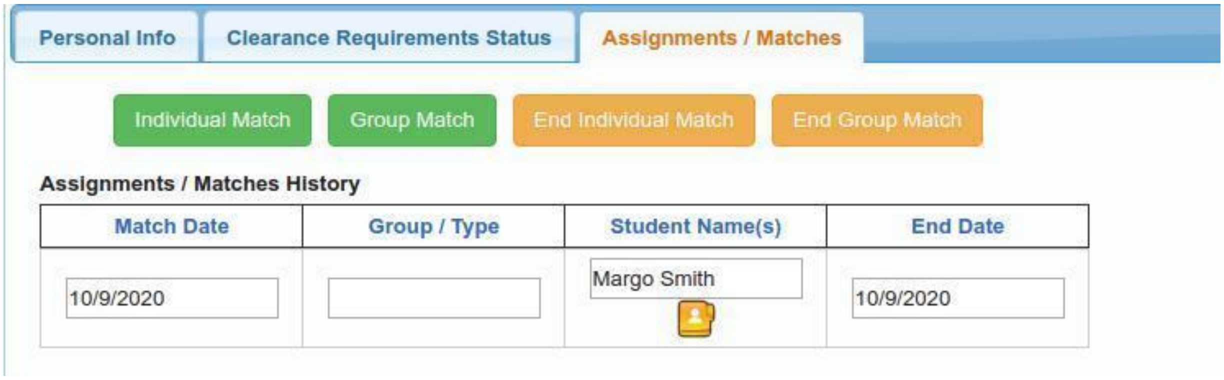
On the following screen, you select the youth, enter the date and click “Submit”:

You will receive the same Submission confirmation message

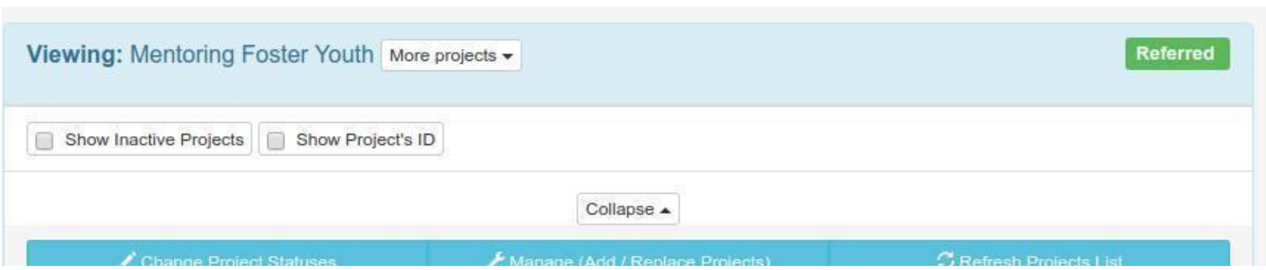
Verify the match by going back to the mentor’s Profile page.

Group and individual matches can be closed much the same, using the close buttons:

When closing a match, you click the name, and then enter the date and the reason for the closure, and back on the Profile page, an End date will be shown next to the individual or group.

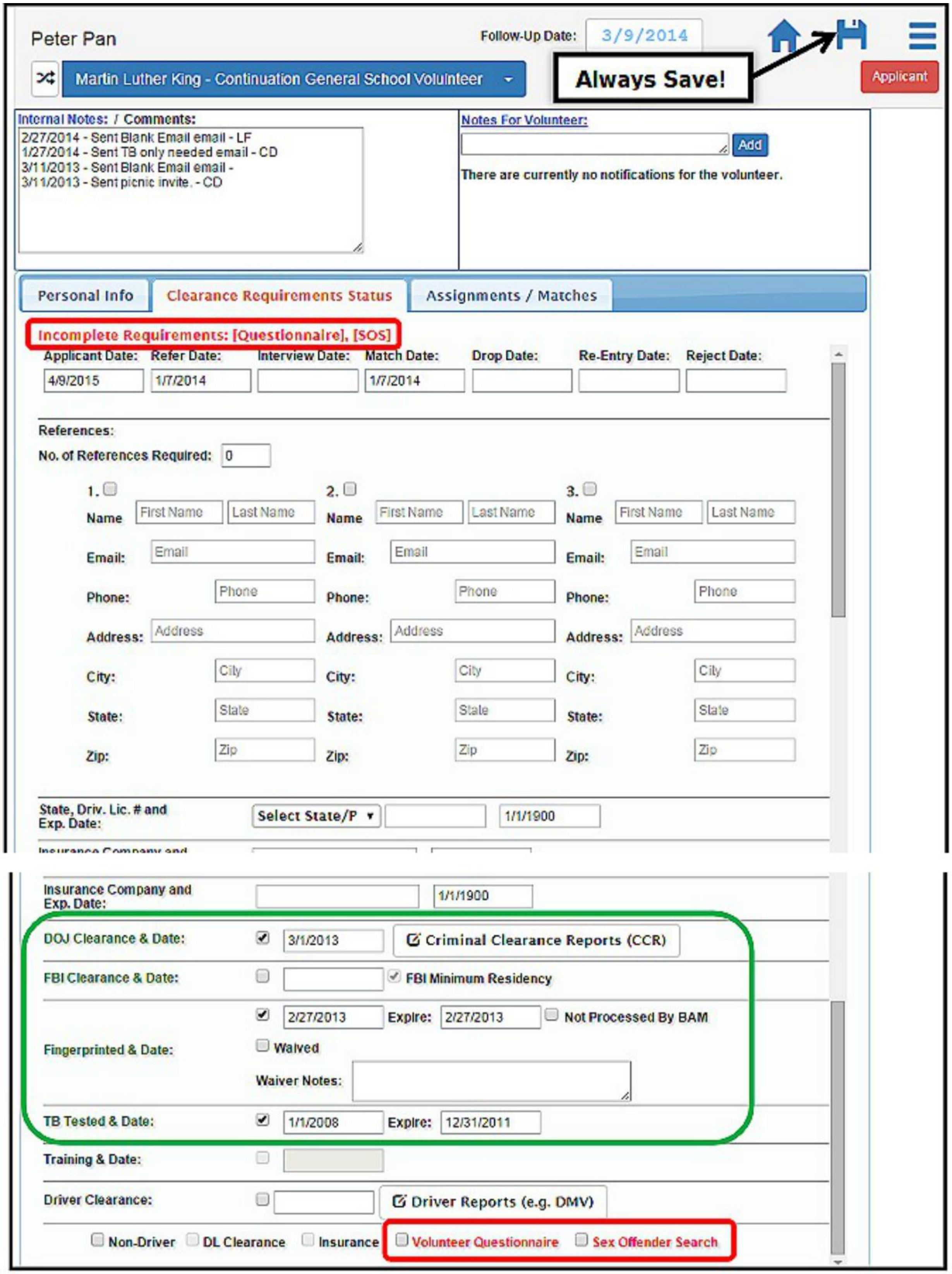


Volunteer Activities/More Projects:

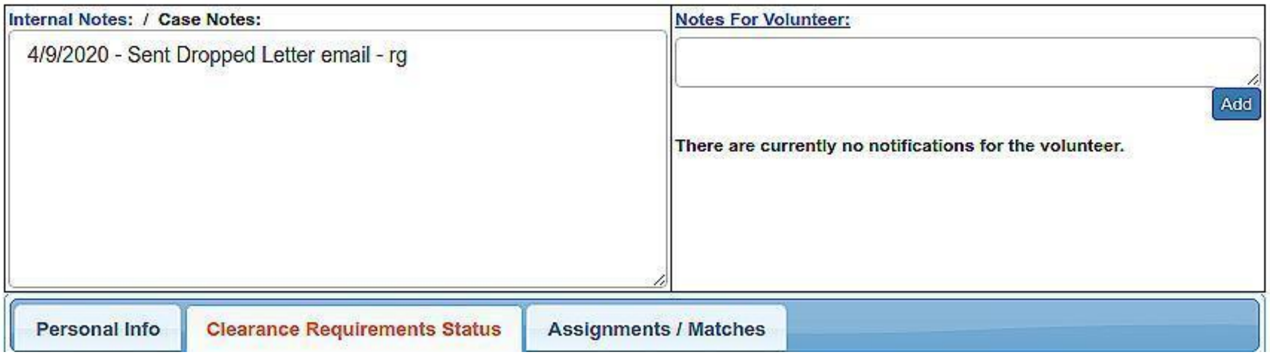


The "more projects" button will open a dropdown menu of all of a volunteer's activities (if they have more than one). Any changes you make need to be done to all projects

You can look in two places to see incomplete (red outline) and/or completed requirements (green outline): the top arrow show all Incomplete Requirements. The bottom two arrows show the actual fields and whether something is complete or not. To show a requirement as complete, check the box and enter the date if needed. Then click "Save".


Peter Pan
Follow-Up Date: 3/9/2014
Martin Luther King - Continuation General School Volunteer
Always Save!
Applicant
Internal Notes: / Comments:
2/27/2014 - Sent Blank Email email - LF
1/27/2014 - Sent TB only needed email - CD
3/11/2013 - Sent Blank Email email -
3/11/2013 - Sent picnic invite. - CD
Notes For Volunteer:
Add
There are currently no notifications for the volunteer.
Personal Info
Clearance Requirements Status
Assignments / Matches
Incomplete Requirements: [Questionnaire], [SOS]
Applicant Date: 4/9/2015
Refer Date: 1/7/2014
Interview Date:
Match Date: 1/7/2014
Drop Date:
Re-Entry Date:
Reject Date:
References:
No. of References Required: 0
1. Name First Name Last Name Email: Email Phone: Phone Address: Address City: City State: State Zip: Zip
2. Name First Name Last Name Email: Email Phone: Phone Address: Address City: City State: State Zip: Zip
3. Name First Name Last Name Email: Email Phone: Phone Address: Address City: City State: State Zip: Zip
State, Driv. Lic. # and Exp. Date: Select State/P 1/1/1900
Insurance Company and Exp. Date: 1/1/1900
DOJ Clearance & Date: 3/1/2013 Criminal Clearance Reports (CCR)
FBI Clearance & Date: FBI Minimum Residency
Fingerprinted & Date: 2/27/2013 Expire: 2/27/2013 Not Processed By BAM
Waived
Waiver Notes:
TB Tested & Date: 1/1/2008 Expire: 12/31/2011
Training & Date:
Driver Clearance: Driver Reports (e.g. DMV)
Non-Driver DL Clearance Insurance Volunteer Questionnaire Sex Offender Search

Internal Notes/Case Notes

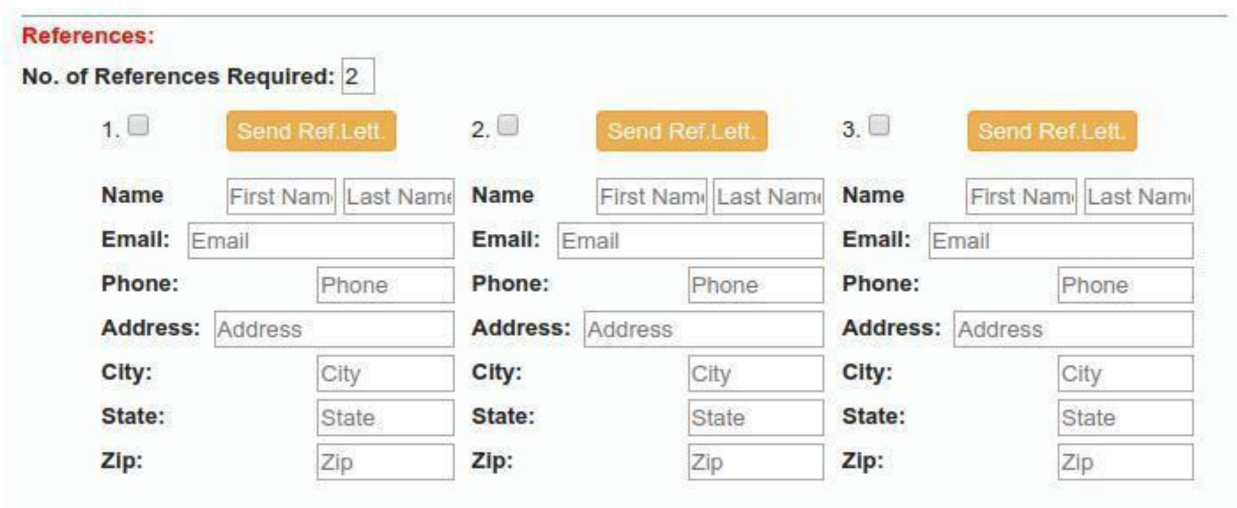


Internal notes is where we record information about contact with a volunteer's file. Notes are added (with date and initials) every time a requirement is updated or an email is sent. Once a note is added, ALWAYS SAVE in the upper righthand corner. When sending emails, Internal Notes will be automatically updated for each volunteer on the distribution with the date and text in the Email Notes field.

The format should be Date/Text/Initials.

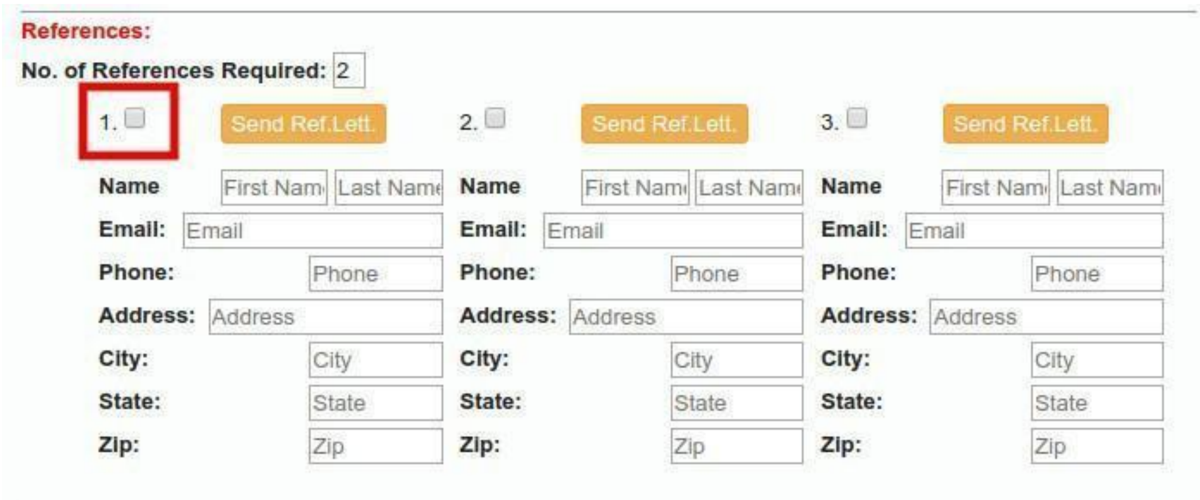
Case Notes are typically used for updates after volunteers have completed their clearances, such as documenting check-ins and updates for mentors.

References:



When a volunteer logs in and updates their reference information, it is populated into these fields. Once a name and email are entered, a reference letter can be sent by clicking the yellow/orange Send Ref Lett. Button. Once sent, the button will turn green, a note will be added to Internal Notes. Letters can be resent if information is changed or no response is received by clicking the same button (a new note will be added)

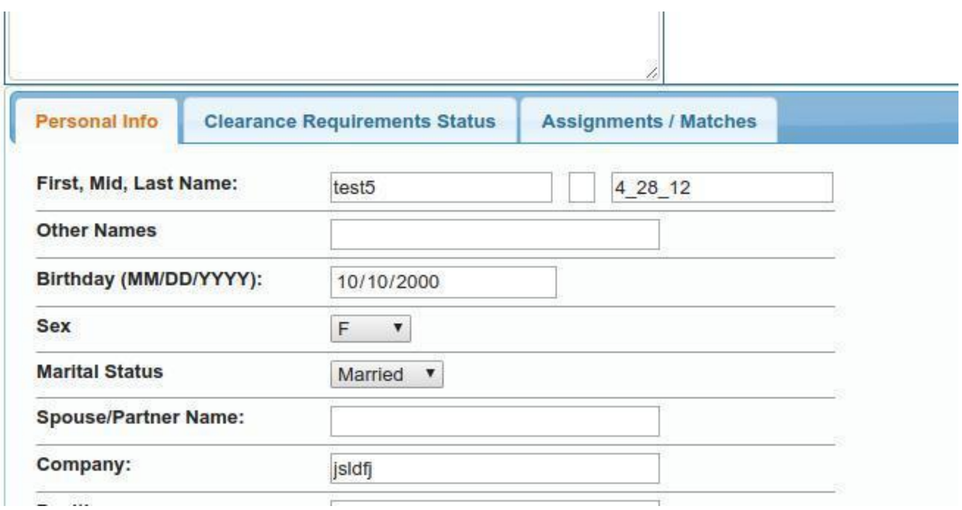
Once a response to a reference is received (will show in Notifications and will be viewable from Documents), the name of the reference who responded can be checked off in the check box next to Send Ref Lett.



ALWAYS SAVE

Personal Information

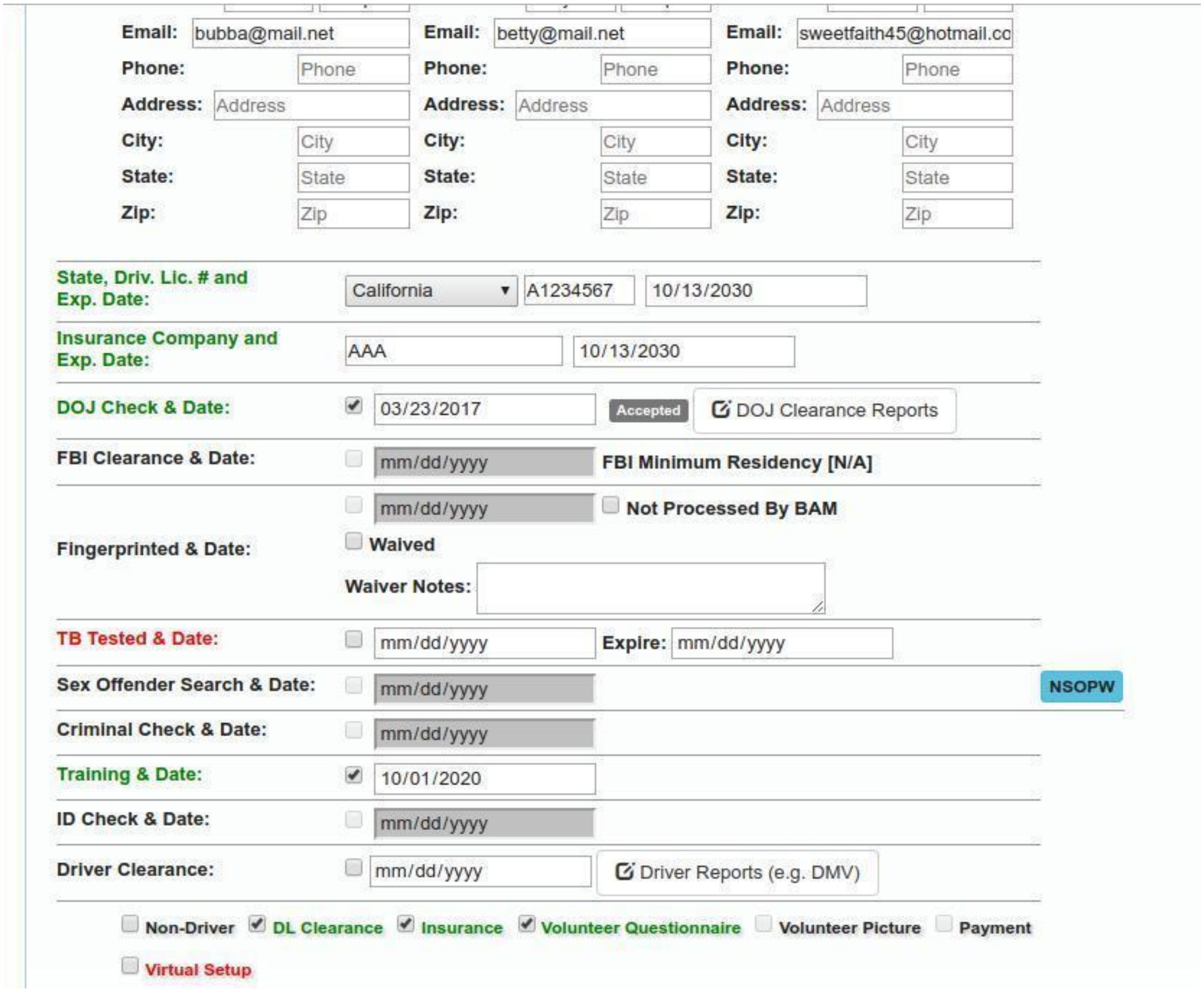
The Profile Page opens default to the tab “Clearance Requirements Status”, but there is another one that can be reached: the Personal Information tab:



Once you click this, you can view and update Name, DOB, address, phone number and other information the volunteer entered. While on the Profile page, this is the best way to view the volunteer’s email address.

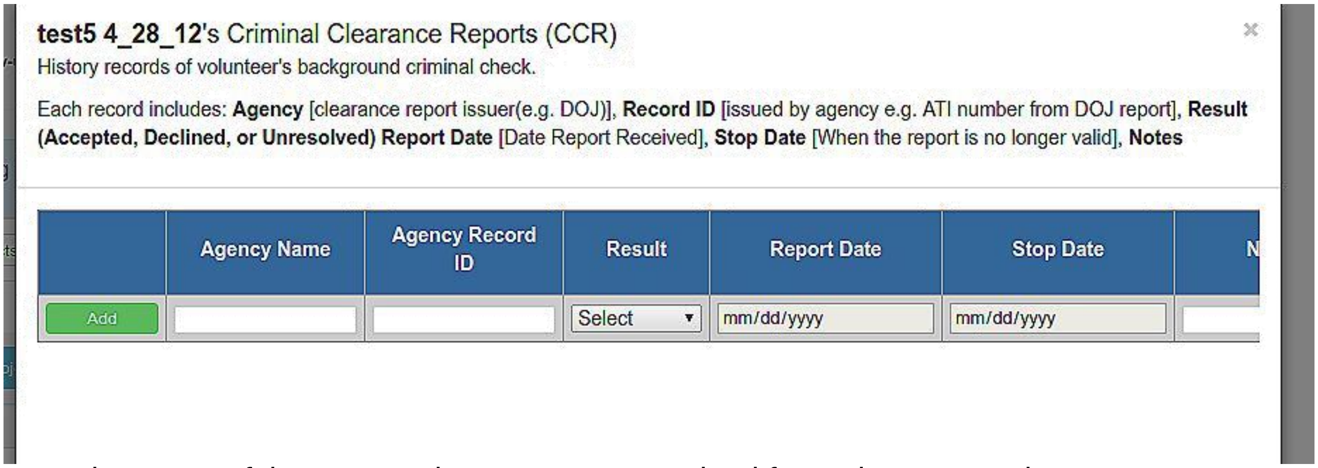
Clearance Requirements

The meat of the volunteer's Profile Page is the status of their clearance requirements



Requirements shown in black/gray are not required for the currently selected project (they may be for others, always select other projects using the "MORE PROJECTS" dropdown to be sure).

Clicking the button that says "Criminal Clearance Reports (CCR)", DOJ Clearance Reports or Driver Reports will open the following menu for reports received:



Here the name of the agency the report was received from, the ATI or other agency record number, the result (approved/declined/unresolved/STOP)

If a STOP is recorded, then our system is no longer receiving updates from the DOJ on the individual, and if they are reapplying for another organization, will need to be re-fingerprinted or obtain a new background check.

DOJ Clearance report is used for projects which use fingerprint based background checks (which have two levels of clearance and three options on the profile page). Projects which use non-fingerprint based background checks will use Criminal Clearance report (one option).

The Fingerprinted & Date box is used for the date that the fingerprints were submitted, and can be useful for setting a time table on when they were received. The Criminal Clearance & Date and FBI Clearance & Date are for when the completed reports are received.

If a fingerprint is waived (say for an individual already fingerprinted with the organization they are applying with and they are already receiving Subarrests on them and have chosen to take upon the liability), the box saying “waived” is checked and a note left in the following box. This will also cause the criminal clearance and FBI clearance boxes to turn green.

The Training & Date information is manually updated by the coordinator after a volunteer completes the training required for a specific project. The box is checked and the date that training was completed is validated in the date field. (When a volunteer initially registers for training, the date field will be populated but not the check box.)

The Driver's license box has a drop down for state, a blank box for license number and a date box for expiration date.

The Insurance box has a box for carrier name and a date box for expiration date.

HOWEVER

There are check boxes at the bottom of the page for both DL Clearance and Insurance. If the above are filled out and the insurance or DL still shows as unmet, always check the bottom boxes!

(the "non- driver" box is checked if a Non-driver form is uploaded indicating that the individual will not drive or transport mentees in their vehicles, checking this box will cover both the DL and Insurance requirements).

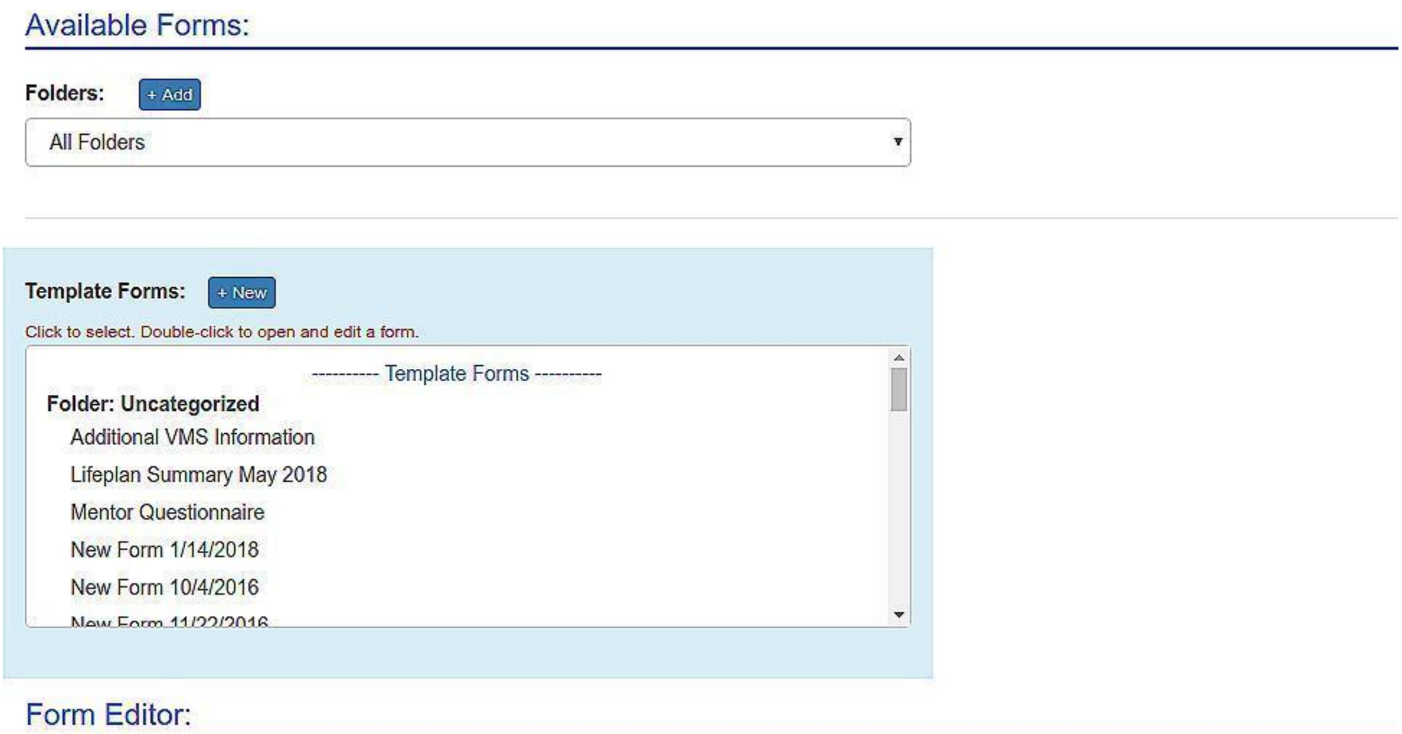
Custom Forms

You can access Custom Forms from the Coordinator Menu, the button is along the bottom row as seen in Figure 53.1. Custom Forms are a great tool to collect data on volunteers/mentors. They can be used as questionnaires for your volunteers/mentors, sign-up sheets and surveys for schools to retrieve updated information. It allows you to create fillable forms/surveys much like Google Forms or SurveyMonkey.

Fig. 53.1

Creating A Template

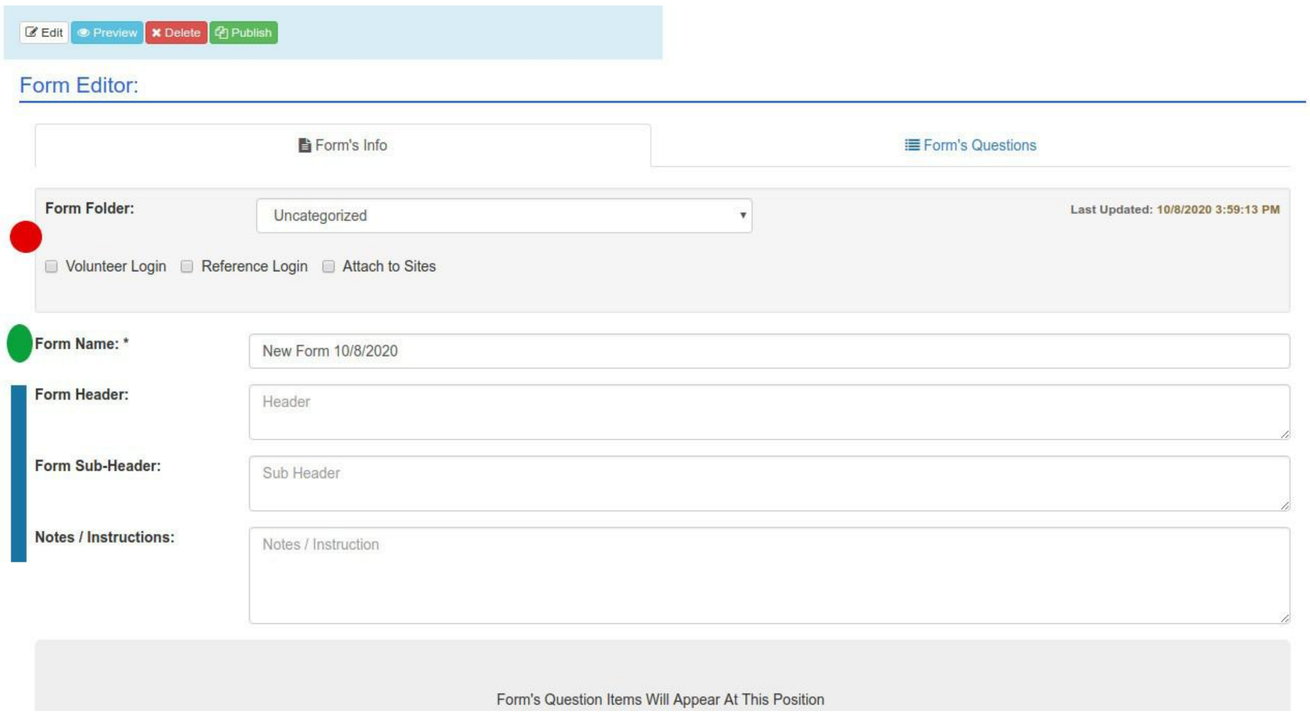
Click on "Custom Forms" to access the page and click "New" Next to "Template Forms). TIP: Organize Forms by creating Folders (If you pick "New" while in "All Folders" it will be placed under Uncategorized).



Published forms cannot be altered, but they can be redistributed. Once you complete and publish a form, there is a template version saved so that you can alter or update forms using your previous templates, and then publish them as a new form.

Form's Questions

The "Form's Questions" tab shows the placement order on the page for each field, and where the questions will be inserted. Enter in the information on the "Form's Questions" tab.



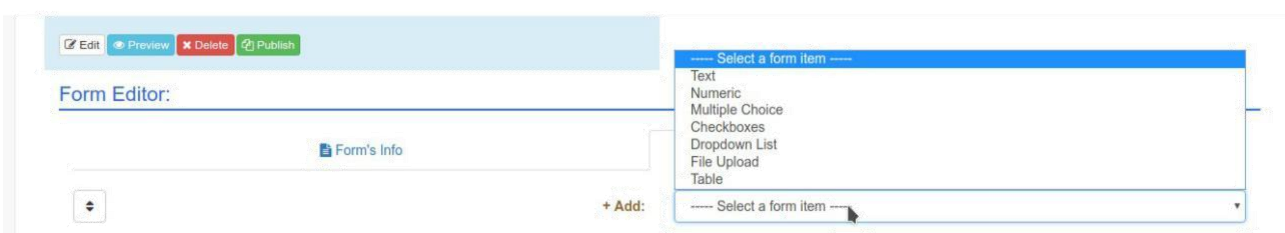
If the form should be uploaded to a volunteer's dashboard, make sure to check "volunteer login" here.

Give new forms a distinctive name

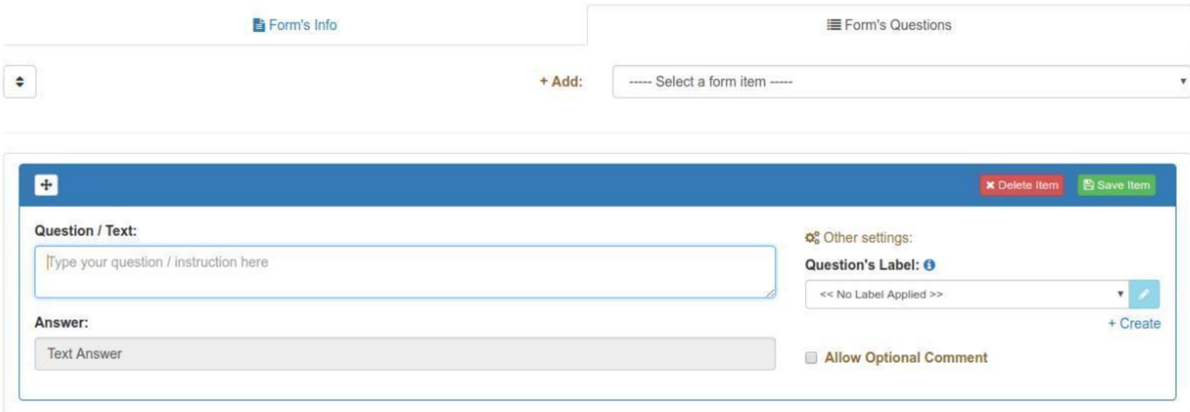
Create a header, sub-header and instructions for each form here:

When you want to add questions, select the "Form's Questions" tab:

Initially this page is blank, as you can see from the dropdown menu in the image below, there are a few choices of the types of questions you can ask. Below are examples of each.

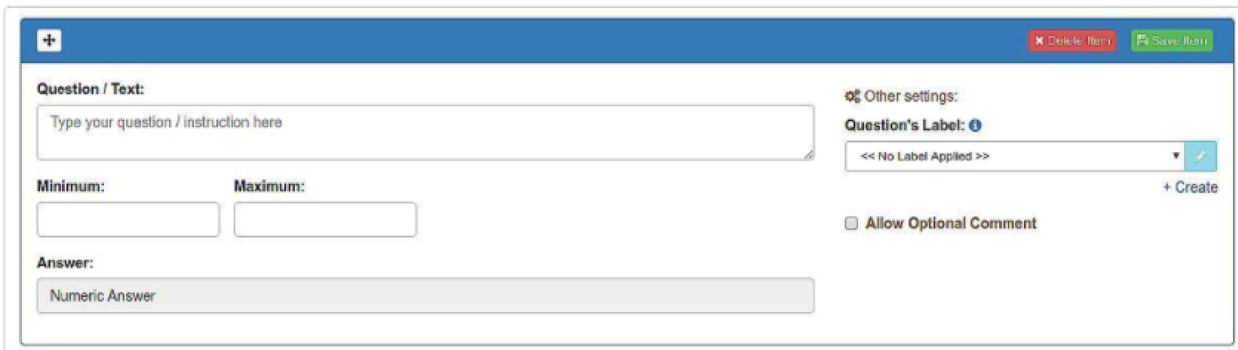


Text: You would ask a question that warrants a longer response. More like open-ended questions like, "Why are you interested in volunteering?" You have the option to "Delete" or "Save" for every question type.

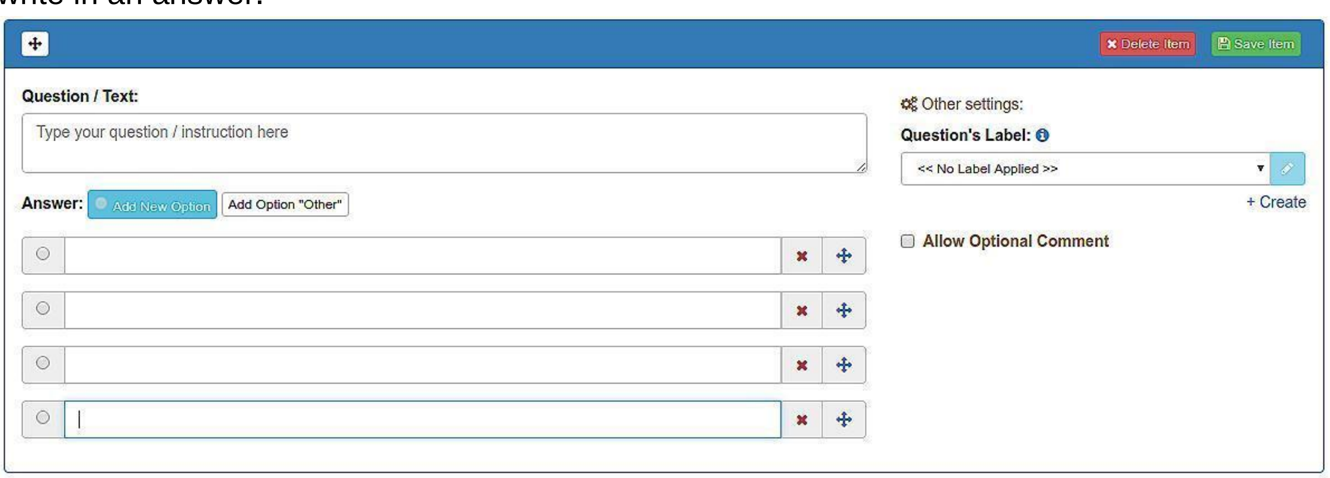


Best Practice: Open-ended questions can be very helpful, but when you want to gather information and see a variation in answers, it is easier to track data using the other question options which can compare which answers have been chosen.

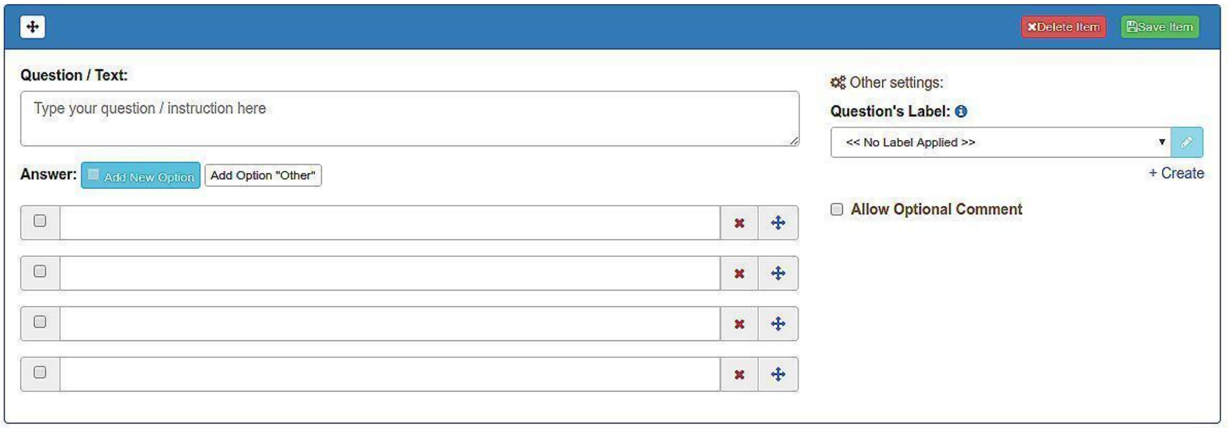
Numeric: You set a number range for your recipient pertaining to your question.



Multiple Choice: These are geared for one answer questions. Click “Click Add Option” To add more choices. “Other” is another option that presents a box for recipients to write in an answer.

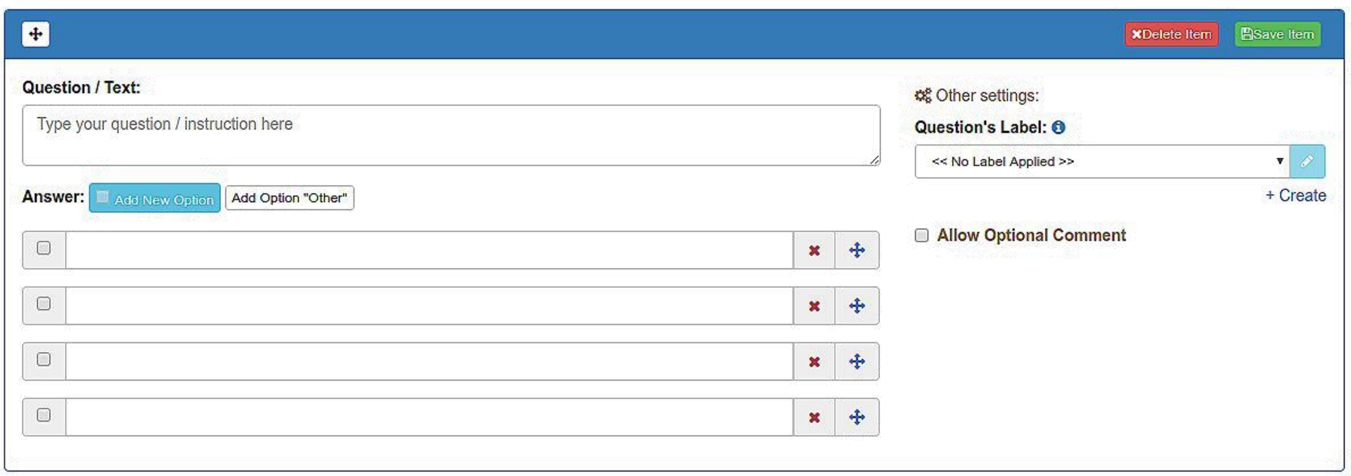


Checkbox: Checkboxes allows recipients to pick multiple options at once



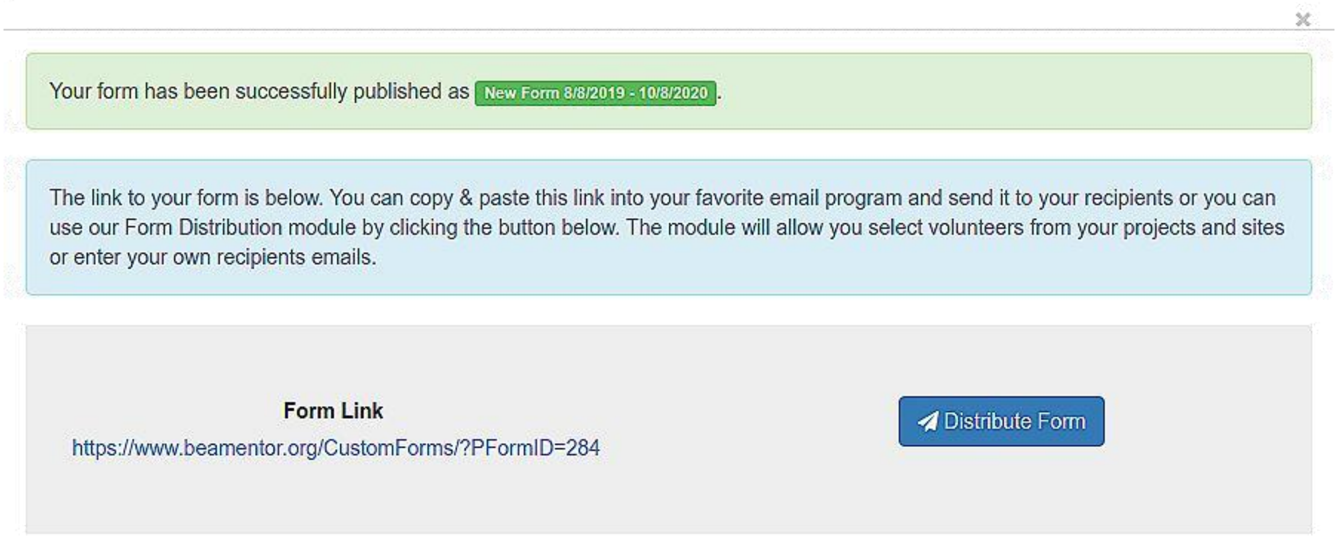
Drop Down Menu Question: You can also create a drop down menu. When the form is published the question will appear as a drop down menu.

NOTE: There are x's next to each option if you would like to remove that answer choice.



Preview: Once you have completed the fields in both Form's Info and Form's Questions, you can Preview the form by clicking Preview.If you need to make any changes after viewing the preview, make sure to save them. You are able to change the order of any questions by clicking and dragging the question somewhere else. You will see the other questions move down a little where your question will be inserted. You may need to refresh the page to make sure that your changes saved and are visible on the form

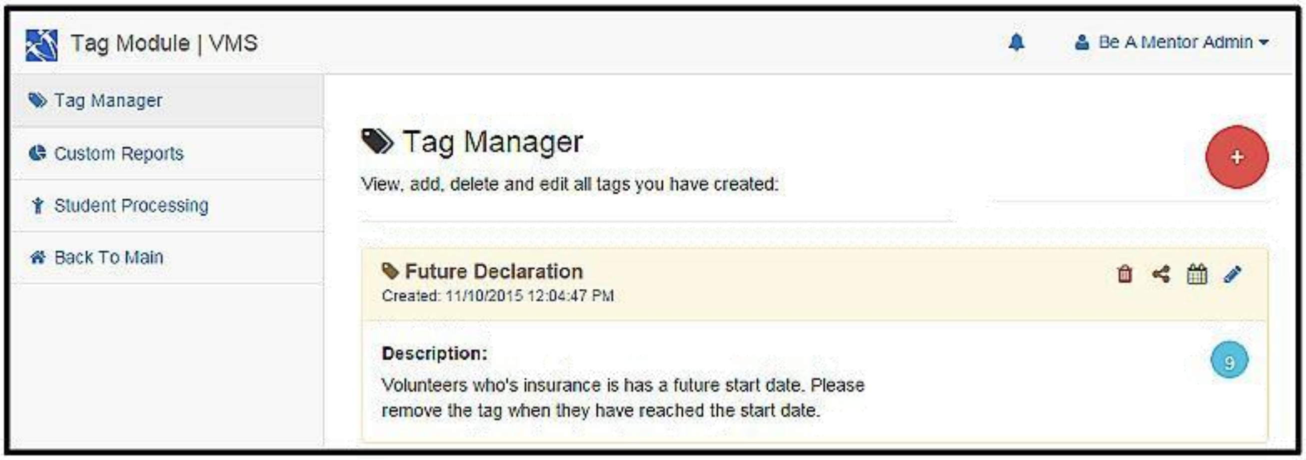
Publish: If the Preview looks good, you click "**Publish**". Once the Form is published, you are now able to distribute it or upload it using the link provided. This is the URL you will copy and paste into the Documents and Files section of the Admin page to allow it to be filled out for a clearance requirement.



You can copy the link by right -clicking Copy Link Address and upload it to use as a Project Requirement. You can click “Distribute Form” which will take you to the next screen.

Published Forms: Once you have published a form, you can “Delete” or “Disable” the form so that it cannot be used. Be sure to read the options carefully so that you do not lose any information or data that you would like to keep!

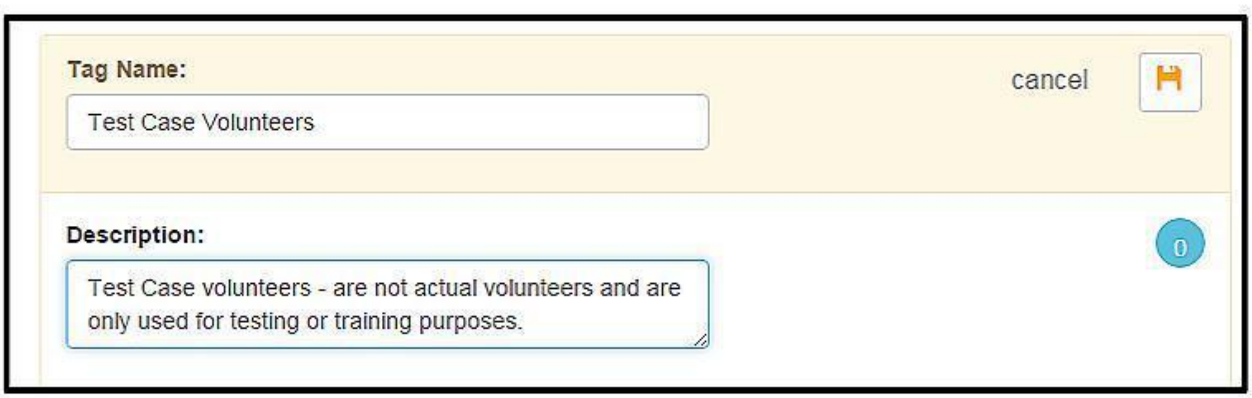
Tag Manager: The tag manager is a great way to keep track of several different groups of volunteers. You can get to the “Tag Manager” from the Coordinator Menu as shown below as well as through student processing. Click on the “Tag Manager” button.



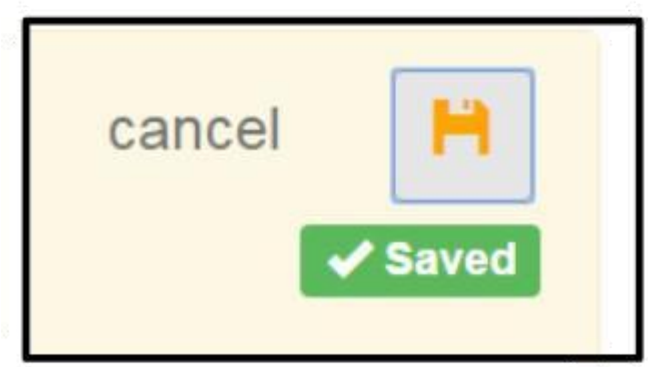
Creating a New Tag

To add a tag click on the red circle button with the plus sign

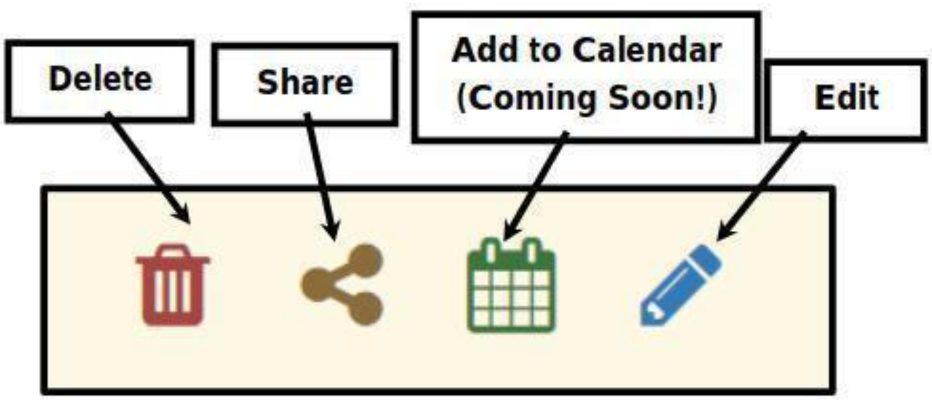
Now enter in the tag's name and description



After entering in the information click on the yellow hard disk button on the right-hand side of the tag entry.

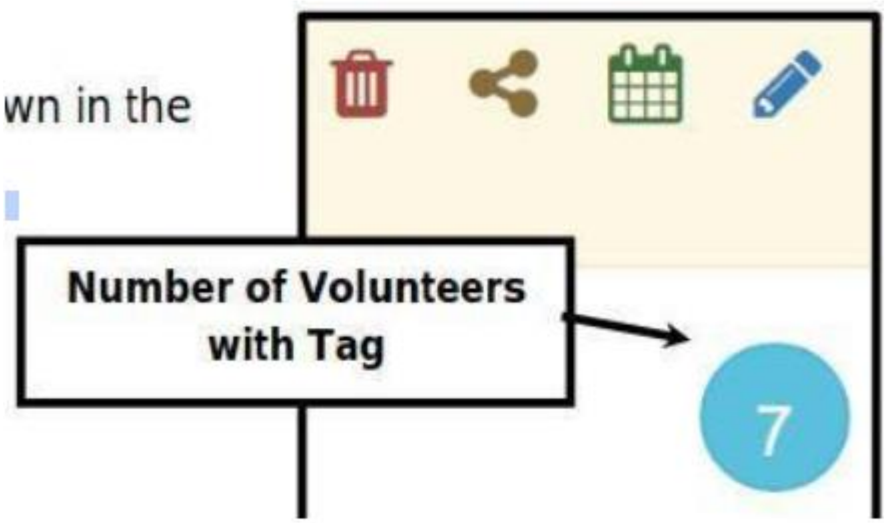


After a tag is made you can either delete, share, add to calendar (Coming soon!), and/or edit the Tag.



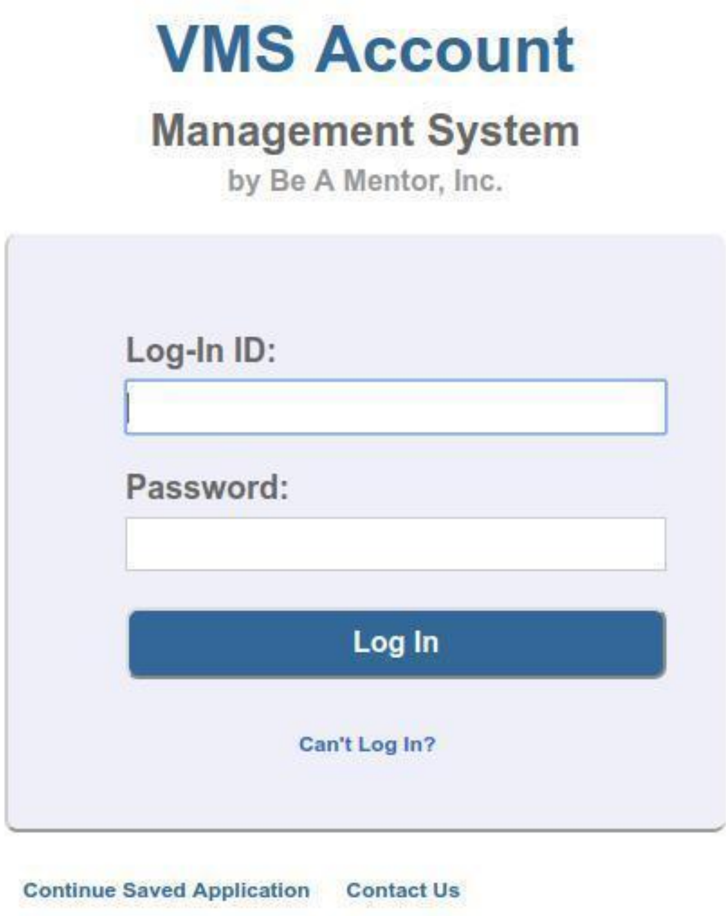
Number of Volunteers with Tag: The number of volunteers with this tag will be shown in the blue circle underneath the Edit button.

Click on the blue circle button and it will bring up the Tag's Manifest window as shown below. Here you can see both Volunteers and/or Children that have a specific tag.


wn in the
Number of Volunteers with Tag
7

Volunteer Dashboard:

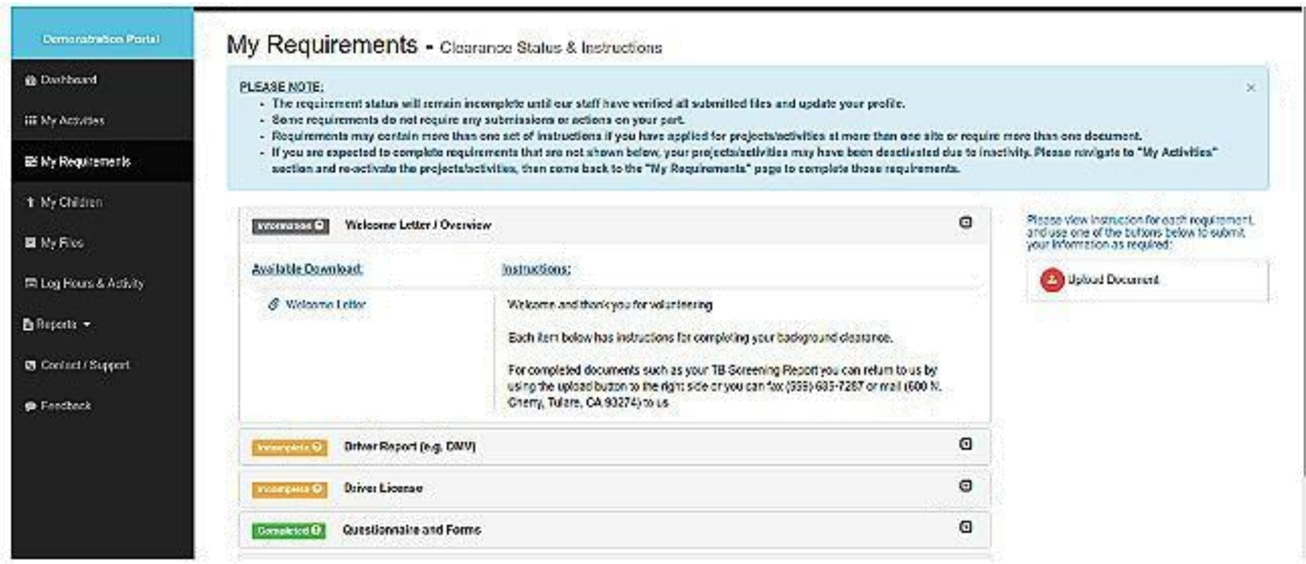
The link for volunteers/mentors to login is: https://beamentor.org/login/ , the same as is used for coordinators.



For volunteers/mentors their log-in ID is the email address they put on their application. Their password is either the password they created on their application, or a default password that they will be prompted to change when they first login.

If a volunteer cannot remember their password, they can click "can't login?" and enter their email for a password recovery email to be sent to them.

Once a volunteer/mentor logs in, they will be on their Volunteer Dashboard:

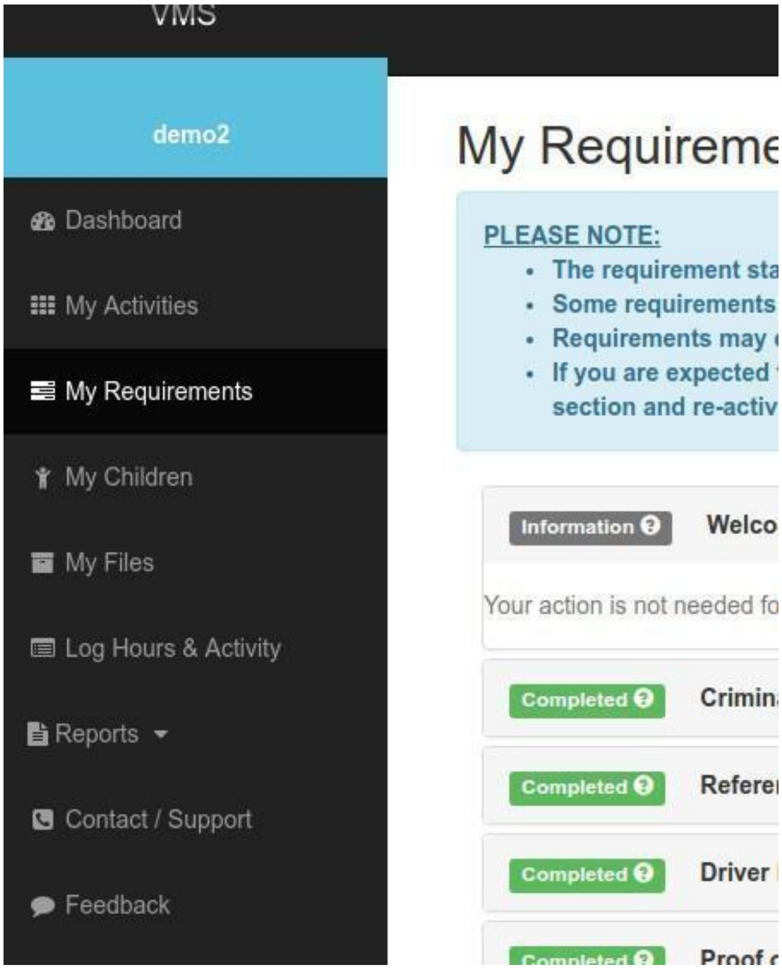


They are automatically taken to the "My Requirements" tab, where a list of the clearance requirements can be found. Items in **green** have been met, items in **amber** are still unmet.

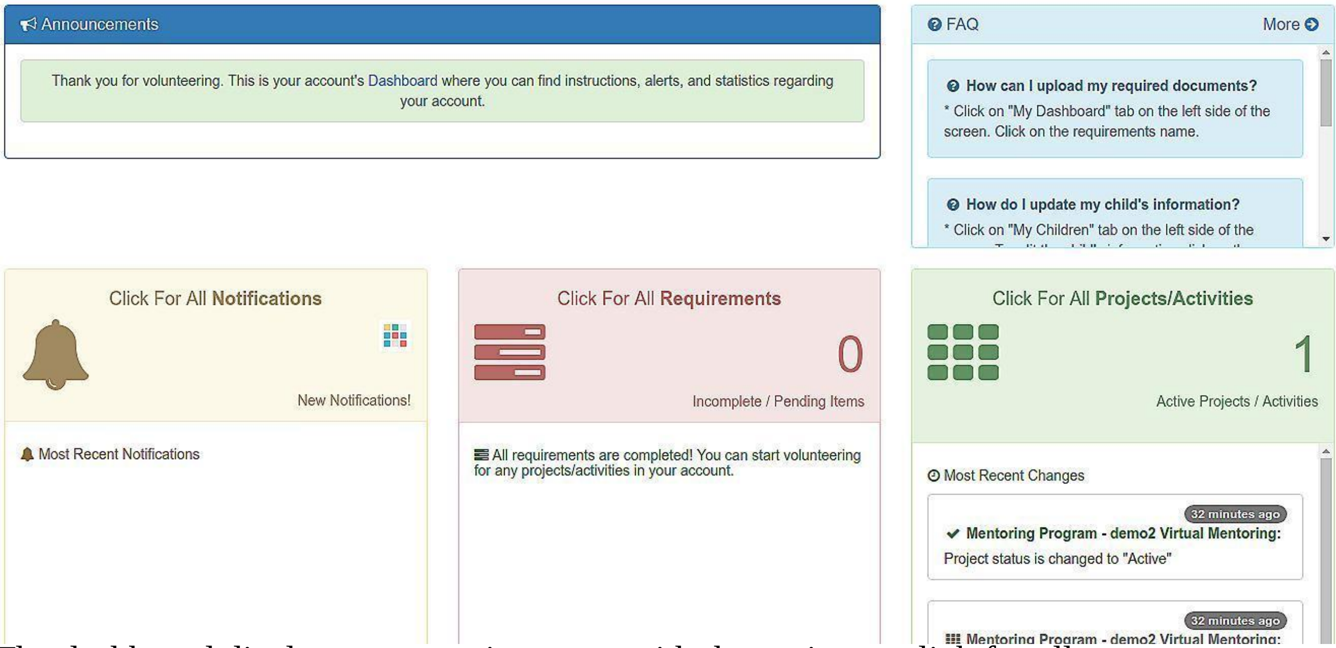
Once documents are uploaded, the must be verified, either by Be a Mentor admin or by the project coordinators/admin (depending on whether or not the clearances are being managed by BAM). This typically takes 1-2 days and if there are issues the volunteer/mentor will be contacted via email.

Dashboard links:

On the left side of the volunteer dashboard is a series of links:

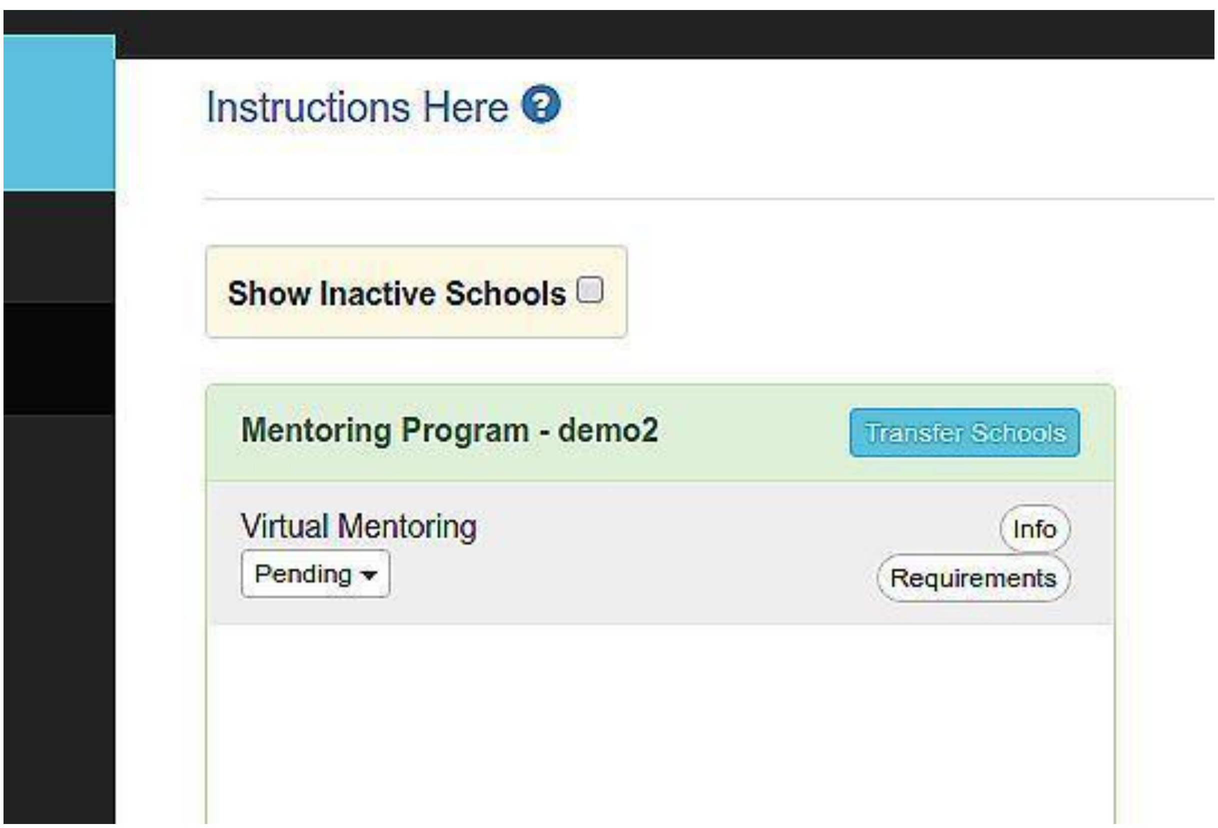


Dashboard



The dashboard displays an overview page with the option to click for all requirements (this will return to the default My Requirements page)

My Activities

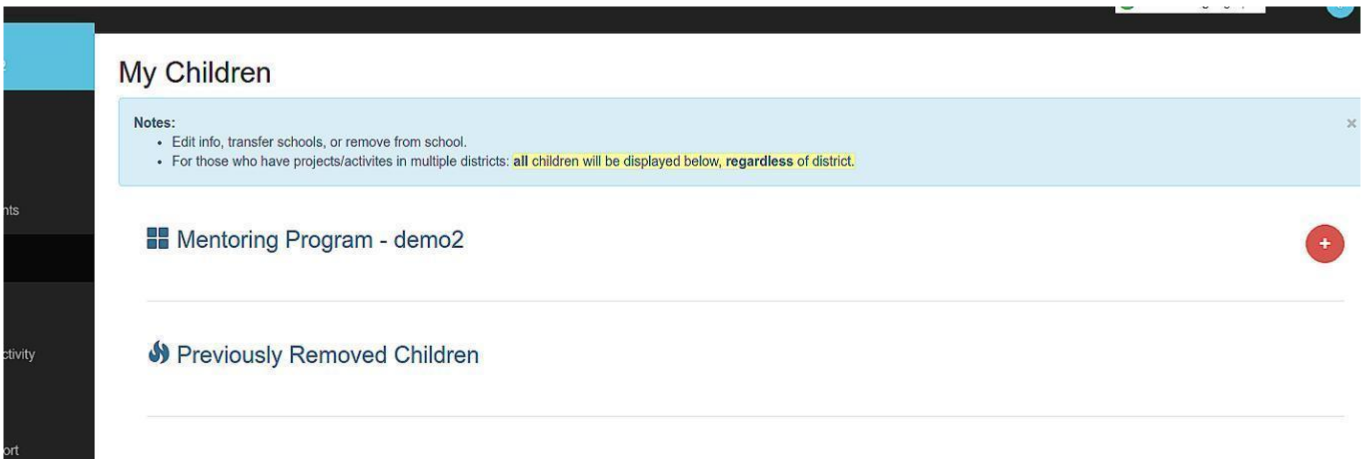


Displays current projects and any inactive schools if applicable. The blue “transfer schools” button can be used to select another school. This is also where applicants can change their status (using the button in the above which says “pending” and can be changed to Inactive.

My Requirements

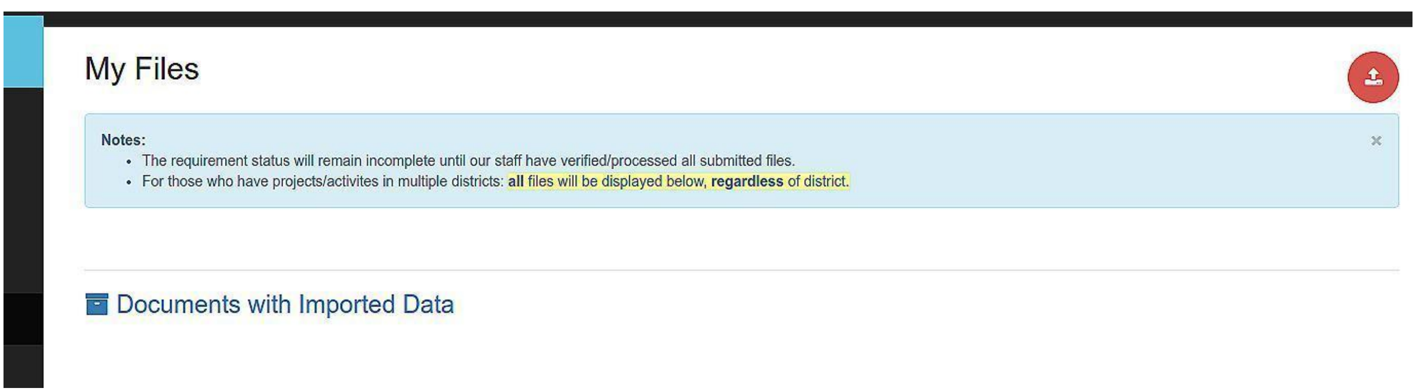
This is the default screen that opens when a volunteer logs in, and contains all their clearance requirements, as well as the buttons for uploading documents and signing up for training.

My Children



(School volunteers only) This is the tab where volunteers can enter and change information about their children. To Add a new child click on the red plus button on the right. Complete information and click "save"

My Files



Allows viewing of any documents uploaded by the mentor such as insurance documents, driver's license, etc

Log Hours & Activity

This feature allows a volunteer to record hours and activities for projects that require on-going Activity Log updates such as mentoring programs.

Select a Type of Match:

Check the "Individual" or "Group" radio button on the left of the type of match.

	Type of Match
(●)	Individual
( )	Group

Click "Next" to go to next page

>> Next >> | Close Window

After selecting the individual or group to be updated, the Volunteer Activity Information screen is displayed that labels fields that are required. option buttons under the table include Submit to save the information or Reset to clear any entered information.

Volunteer Activity Information:
* Required field

You can only submit ONE activity report for a youth or a group of youths per activity date. If you submit an activity report for a date that exists in our system, it will over write the previous one.	
Volunteer Name*:	Charlie Miller
Youth Name*:	Mary Jones
Activity Date*:	

Enter only boxes that are appropriate	

Time Spent Meeting In Person:	**(enter time in minutes)**
Time Spent on Phone Call:	**(enter time in minutes)**
Time Spent on Email:	**(enter time in minutes)**
Time Spent on Driving:	**(enter time in minutes)**
Time Spent on Research:	**(enter time in minutes)**
Comments*:	

Reports

Hours & Activity Reports

This selection will display all Activity Log entries with the most recent listed first. Fields such as Youth/Group Name, Time categories and Comments are shown.

Click on **Youth Name** if you wish to change or delete an erroneous activity.

Date	Youth Name	In Person	Phone	Email	Driving	Research	Comment
08/29/20	Mary Jones	120	15	0	30	15	Discussed homework issues
02/15/20	Mary Jones	90	5	0	30	0	Met for lunch.

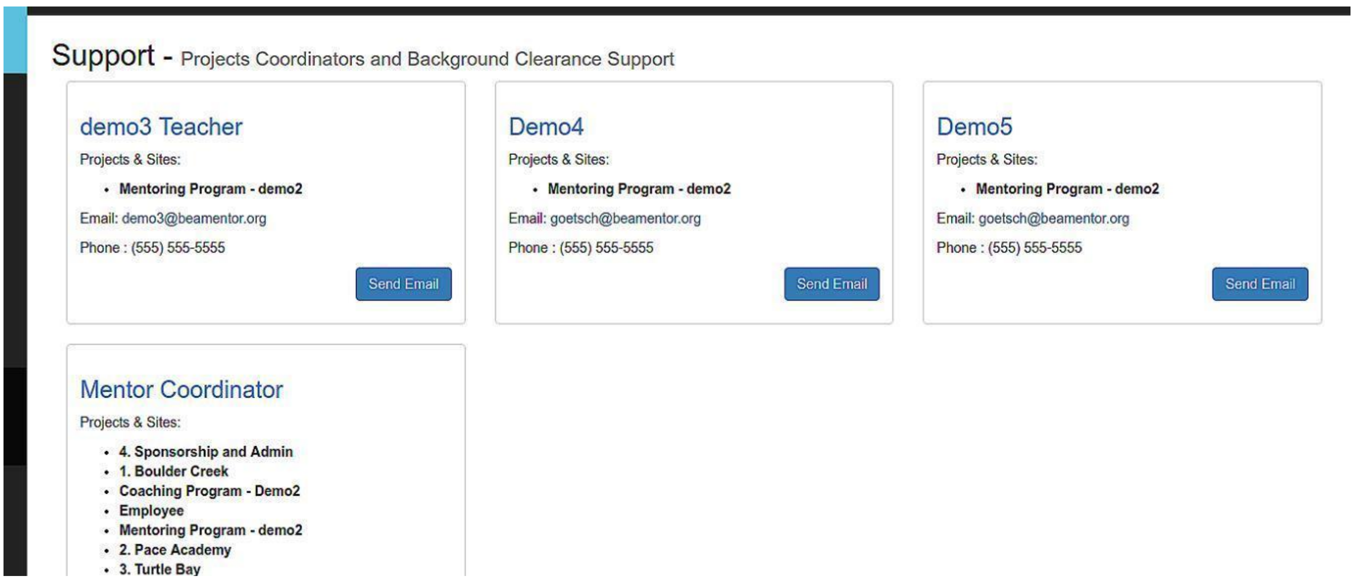
Youth Academics Report

This option will show academic performance for those programs that have an agreement to obtain the information in categories such as GPA, Absences and Disciplinary Actions.

Student Name	Months Mentored	Project	Record Date	GPA	Absences	Discp. Actions
Joe Smith	38	Be A Mentor	10/6/2017	2.33	2	0

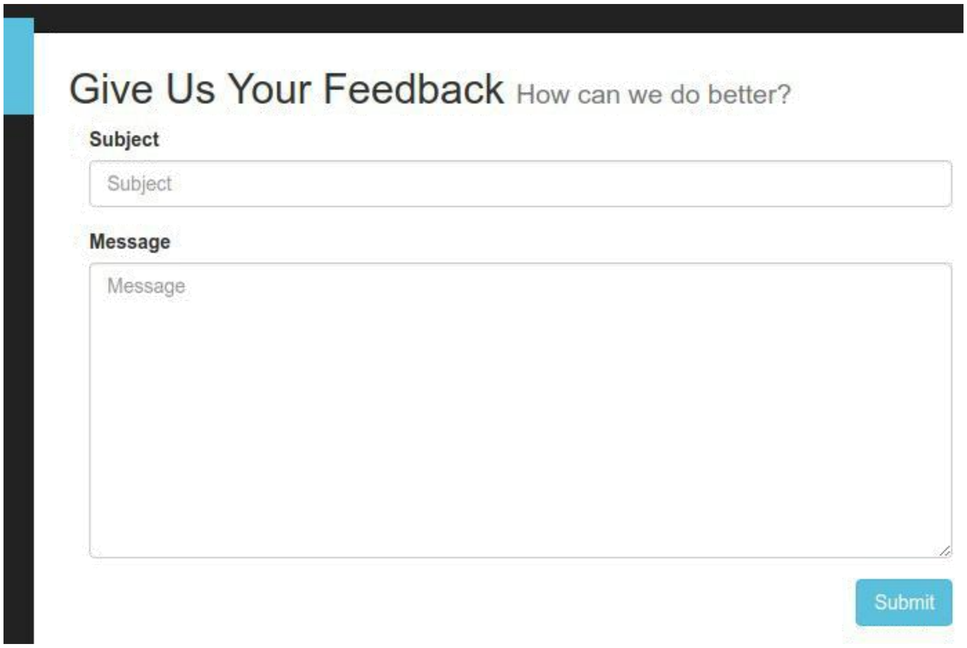
Student Name	Months Mentored	Project	Record Date	GPA	Abcenses	Discp. Actions
		Be A Mentor	1/19/2018	0	8	0
		Be A Mentor	3/2/2018	2.5	10	0

<u>Contact/Support</u>



This tab will show the point of contact for any program the mentor has applied with, and email/phone numbers to reach them.

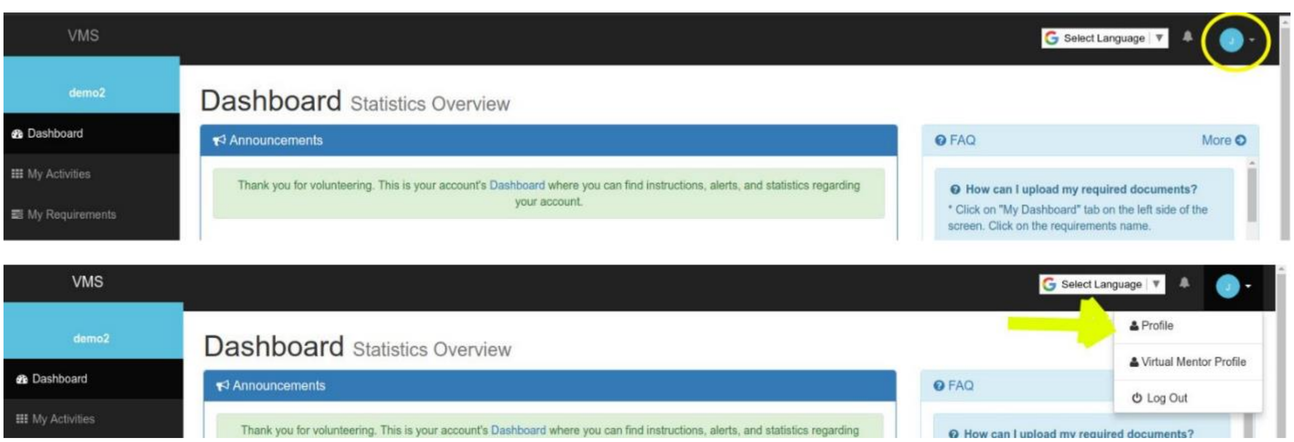
<u>Feedback</u>



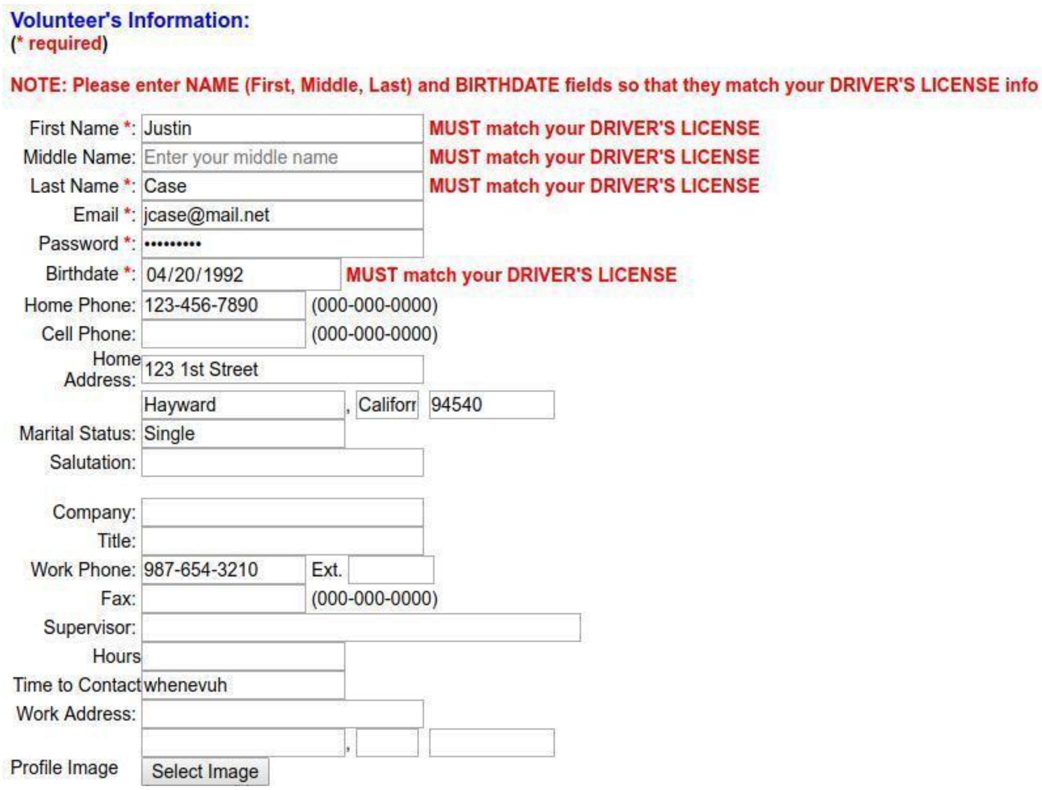
Allows submission of a message of feedback to the site.

Volunteer Profile:

A volunteer may update their personal information in their profile by going to the upper right hand side of their dashboard and clicking the blue circle, then selecting “Profile”:



The profile screen looks like this:


Volunteer's Information:
(* required)

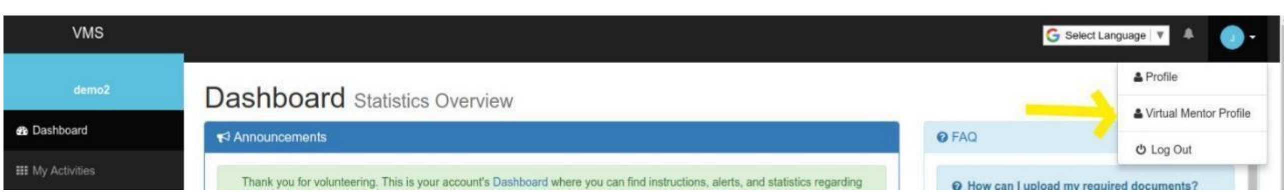
NOTE: Please enter NAME (First, Middle, Last) and BIRTHDATE fields so that they match your DRIVER'S LICENSE info

First Name *:	Justin	MUST match your DRIVER'S LICENSE
Middle Name:	Enter your middle name	MUST match your DRIVER'S LICENSE
Last Name *:	Case	MUST match your DRIVER'S LICENSE
Email *:	jcase@mail.net	
Password *:	•••••••••	
Birthdate *:	04/20/1992	MUST match your DRIVER'S LICENSE
Home Phone:	123-456-7890	(000-000-0000)
Cell Phone:		(000-000-0000)
Home Address:	123 1st Street	
	Hayward , Califorr 94540	
Marital Status:	Single	
Salutation:		
Company:		
Title:		
Work Phone:	987-654-3210	Ext.
Fax:		(000-000-0000)
Supervisor:		
Hours		
Time to Contact	whenevuh	
Work Address:		
	,	
Profile Image	Select Image	

They should be sure to click “Save”.

Virtual Mentor Profile:

If a volunteer is signed up for an activity that uses Virtual Mentoring, then as part of their clearance, they must first fill out their Virtual Mentor Profile:



Profile below:

Virtual Mentor Profile Setup

Zoom Meeting Settings

Meeting URL: https://zoom.us/j/6313558611?pwd=U05vMXRy

Preferred method of communication for Notifications

- [ ] Text:
Re-enter:

- [x] Email: dreymers@beamentor.org
Re-enter: dreymers@beamentor.org

Skills

*(must select a few)

- [ ] **English**
  - [ ] **The Alphabet** (The ABC's)
  - [x] **Beginner Reading** (Putting words together)
  - [x] **Spelling** (Spelling and learning new words)
  - [x] **Vocabulary** (Sentence structure)
  - [ ] **Literacy** (Core literacy)
  - [ ] **Composition** (Basic writing skills)
- [ ] **Math**
  - [ ] **Counting** (The numbers and how they work)
  - [x] **Operations** (Add, subtract, multiply, divide)
  - [ ] **Math Basics** (Core math and problem solving)
  - [ ] **Fractions** (Beyond integers)
  - [ ] **Algebra** (Algebraic equations)
  - [ ] **Geometry** (The shape of math and the math of shapes)
- [ ] **Science**
  - [ ] **Biology** (The science of living organisms)
  - [ ] **Chemistry** (What matter is made of)

- [ ] **Misc**
  - [ ] **History** (World and U.S. History)
  - [ ] **Social Studies** (The social sciences)
  - [ ] **Psychology** (Psych 101)
  - [ ] **Other** (Other topic not listed)

Enter any additional skills not listed above (separate with a comma):

Gum Chewing, String Theory

Grades

K - Kindergarten	1 - First
2 - Second	3 - Third
4 - Fourth	5 - Fifth
6 - Sixth	7 - Seventh
8 - Eighth	9 - Ninth
10 - Tenth	11 - Eleventh
12 - Twelfth	12+

Say a little about yourself:

My blurb about me.

<< Back << | Update

The first section is for the MENTORS zoom meeting URL (further instructions on this can be found in the PDF under “Virtual Setup”. Below that are the checkbox options for entering an email or phone number for reminders (or both)

Underneath this are options for interests/skills that the mentor feels comfortable helping with, and grade levels they are comfortable with (this will also help the teacher/coordinator with selecting mentors for matching with students or groups)

Once completed, the mentor should click “UPDATE” in order to save.

The teacher/coordinator will not be able to bring the individual into the virtual platform until they fill out this profile.

Virtual Platform

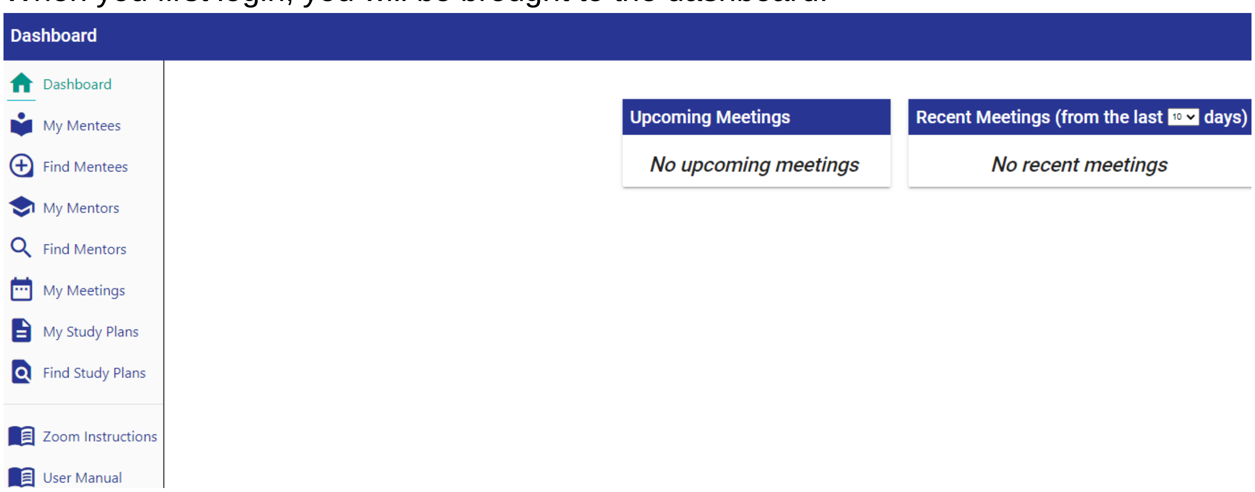
Logging in/Dashboard

The address to access the Be a Mentor virtual platform is vm.beamentor.org.

In order for mentors to have access to the platform, they must have signed up for a virtual project, have completed all clearance requirements, and have filled out a Virtual Setup profile from their dashboard (this pulls them into the system and populates their profile.

Access credentials for coordinators and mentors are the same as for the normal site of beamentor.org/login. Mentees logins are the YouthID created by the coordinator and a default password (#A2zYOUTHID#) which they will be prompted to change upon logging in. All users may reset their passwords using the Forgot Your Password button.

When you first login, you will be brought to the dashboard:



The navigation bar is on the left and the center displays Upcoming and Recent meetings.

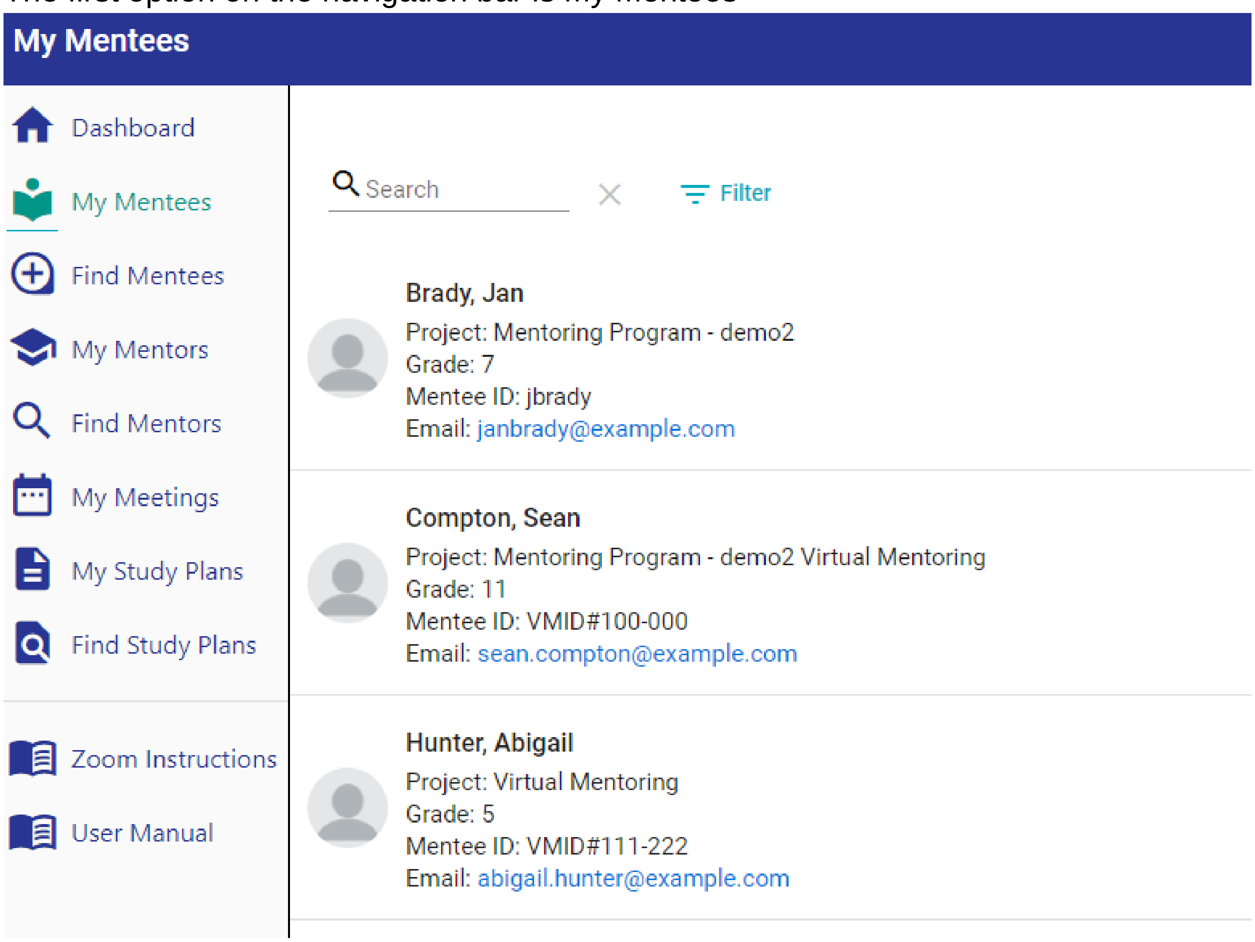
My Profile

You can access your profile by clicking the name in the upper right corner, and then “profile”

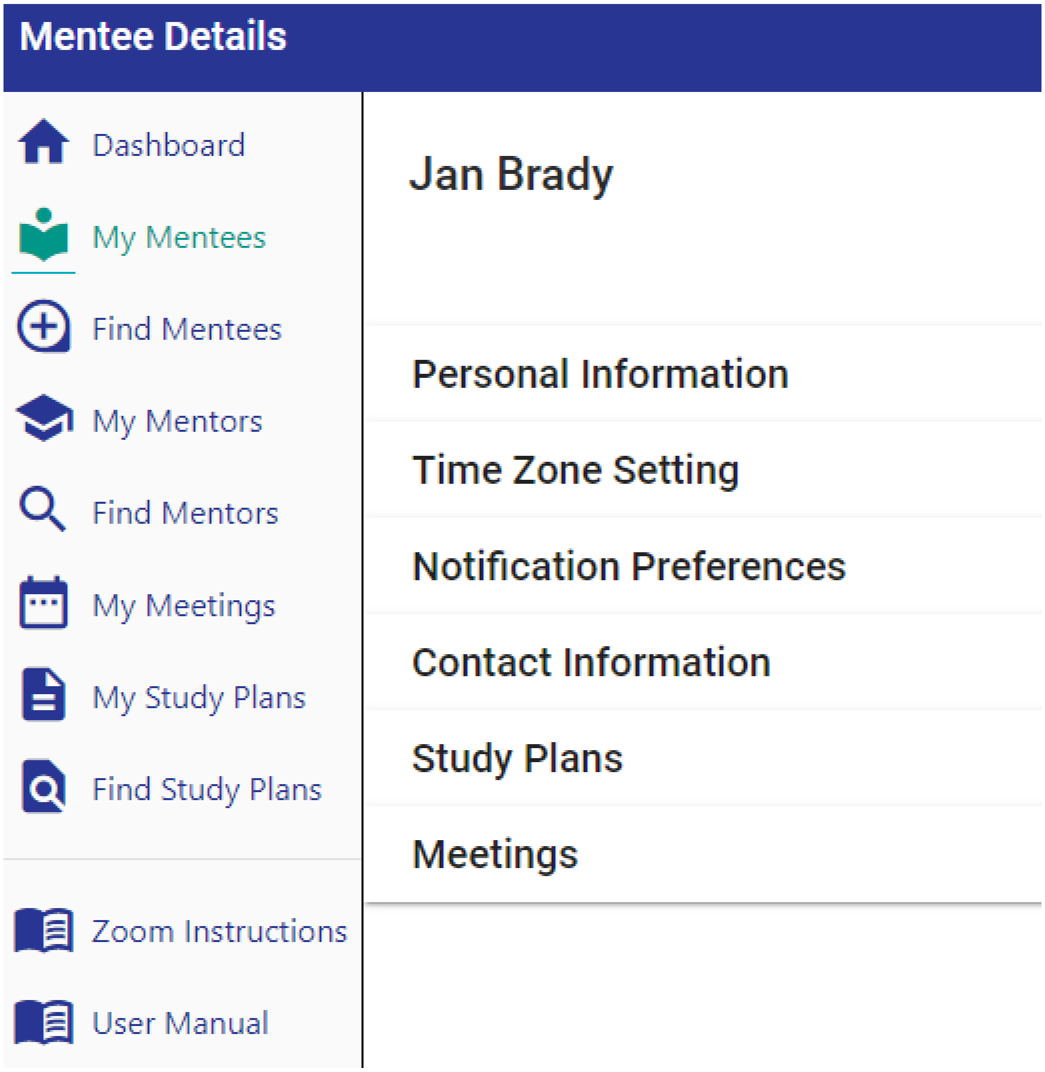
Here, you can change your Personal Information, Contact Information and Zoom meeting settings. Mentors and Mentees both also have profiles they can adjust here, with options also for setting availability and interests/skills.

My Mentees

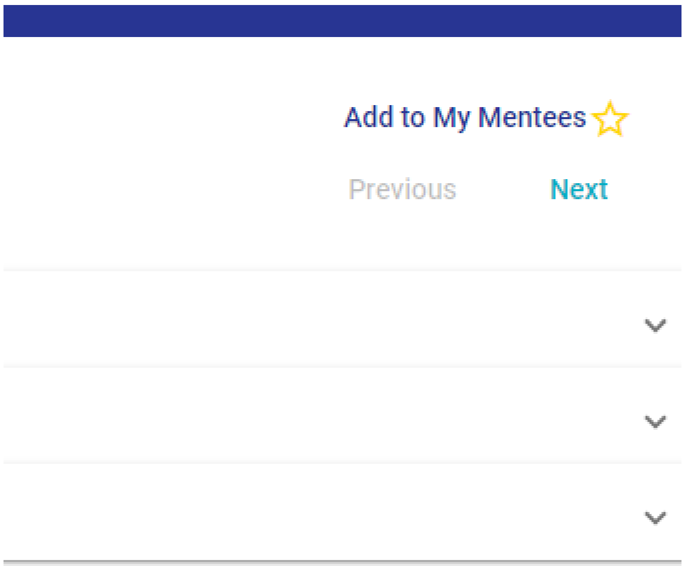
The first option on the navigation bar is My Mentees



Clicking a mentee's name will open their profile (each option can be opened clicking the title:

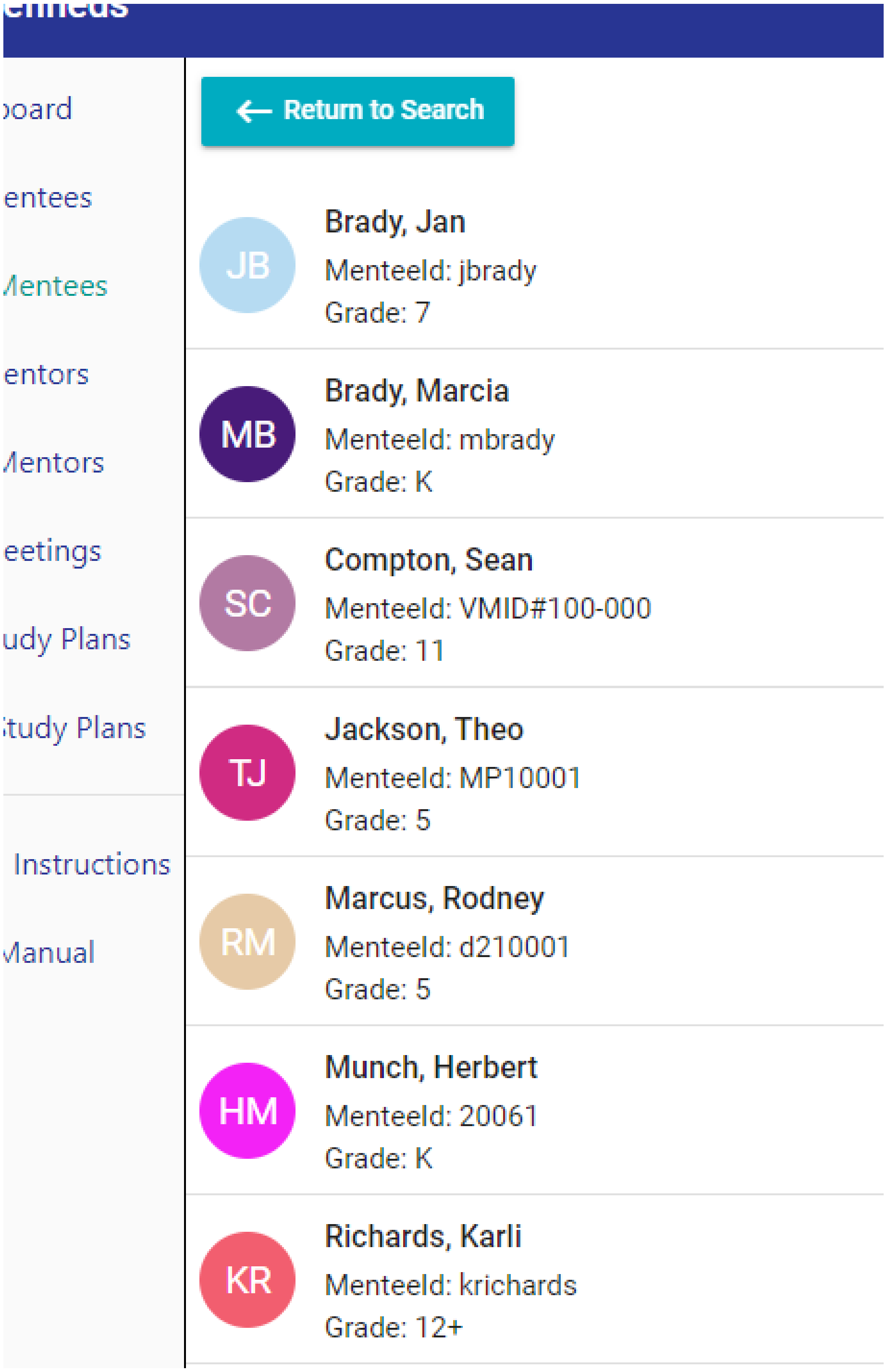


On the right side, you can click the star to add or remove the current mentee to My Mentees



Find Mentees

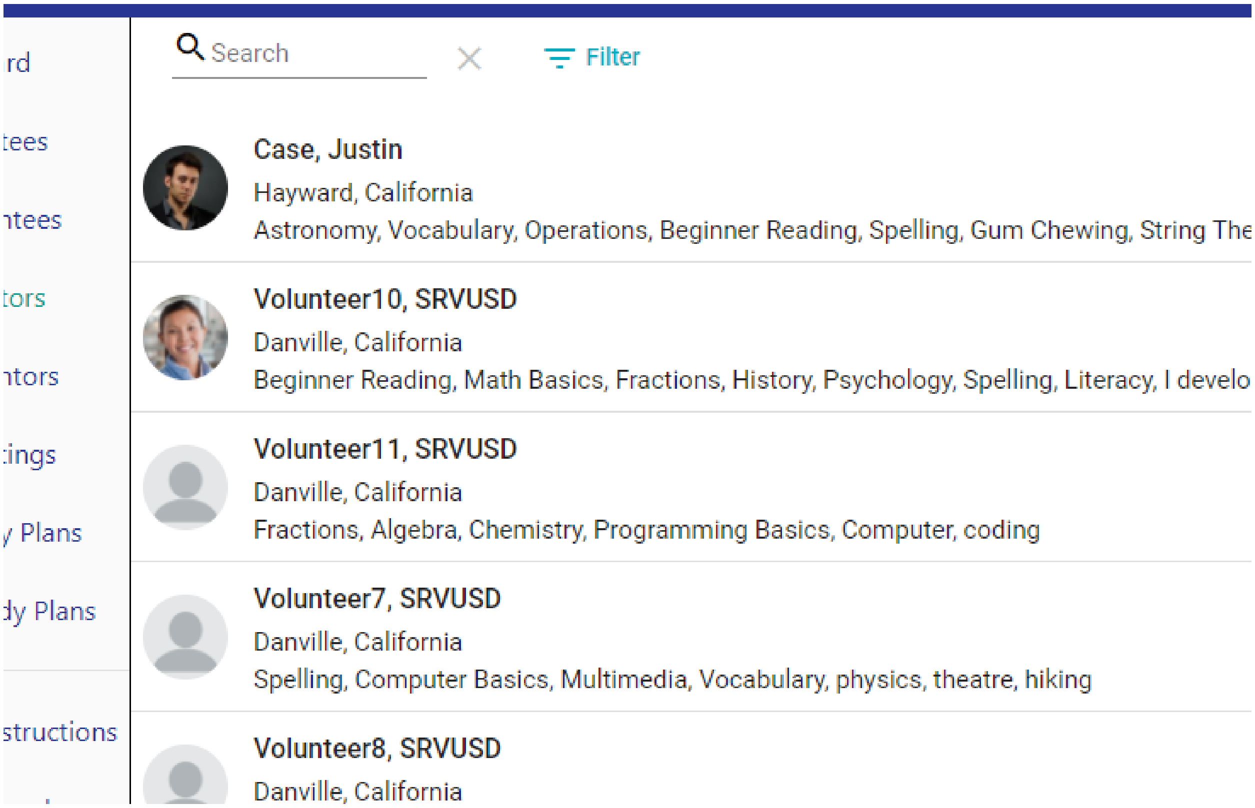
The second option on the Navigation bar is Find Mentees. This allows you to browse or search for a mentee within your program.



Clicking a name will open the mentee's profile and allow you to add that mentee to My Mentees,

My Mentors

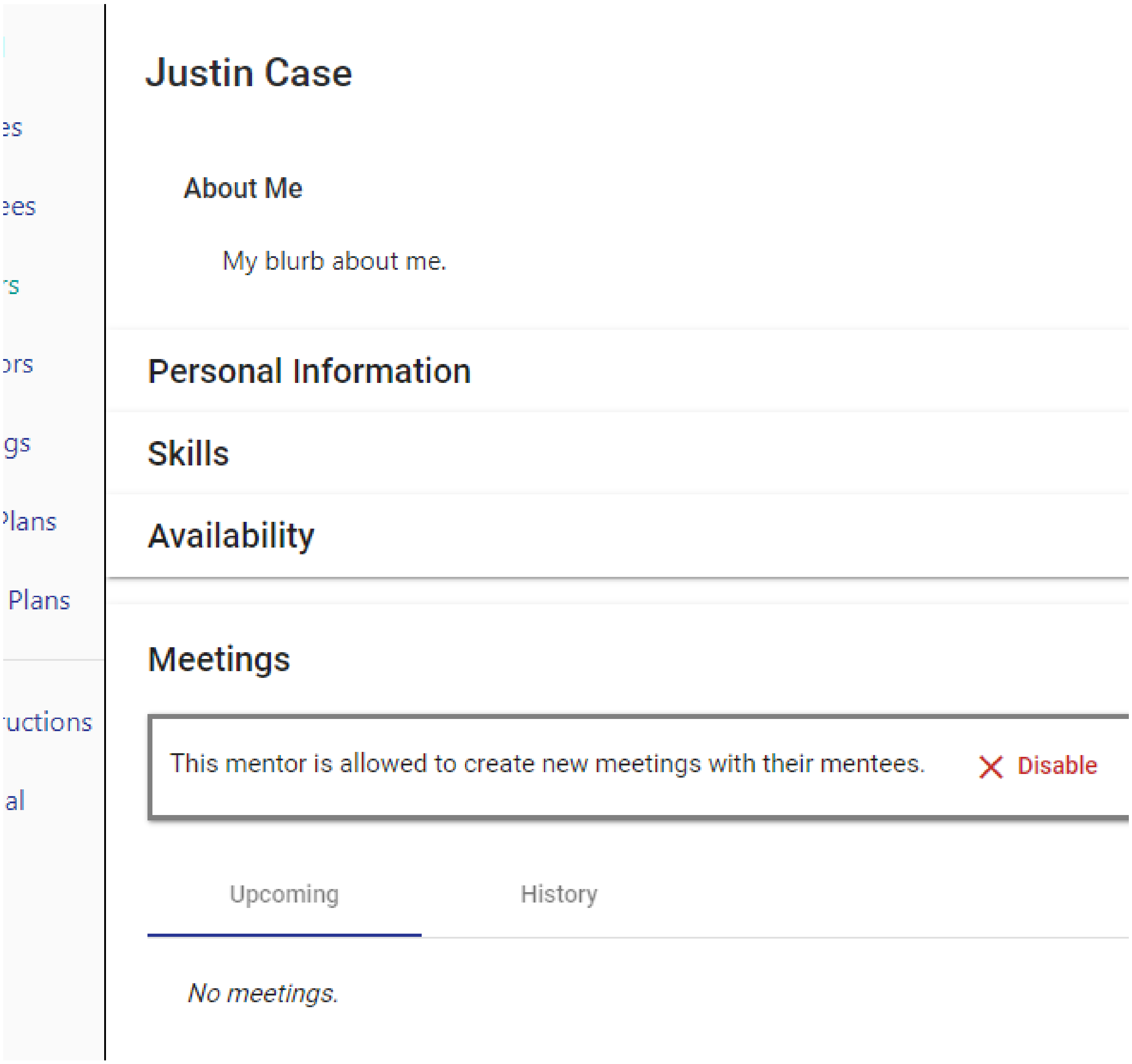
Here you can view the profiles of mentors you have found and added from your program:



Clicking a mentor will open their profile:

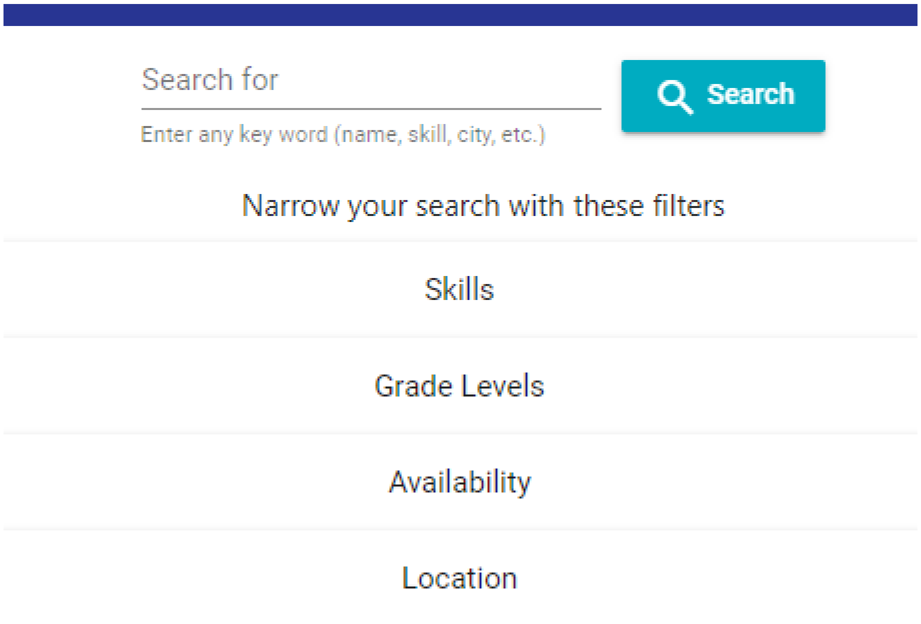
IMPORTANT:

The first meeting on the platform between a mentor and mentee MUST be set up by the coordinator. However, after this first meeting, you can choose to allow a mentor to schedule their own meetings with their mentees. This option can be toggled on or off from the Profile, using the Meetings tab (mentees cannot schedule meetings):



Find Mentors

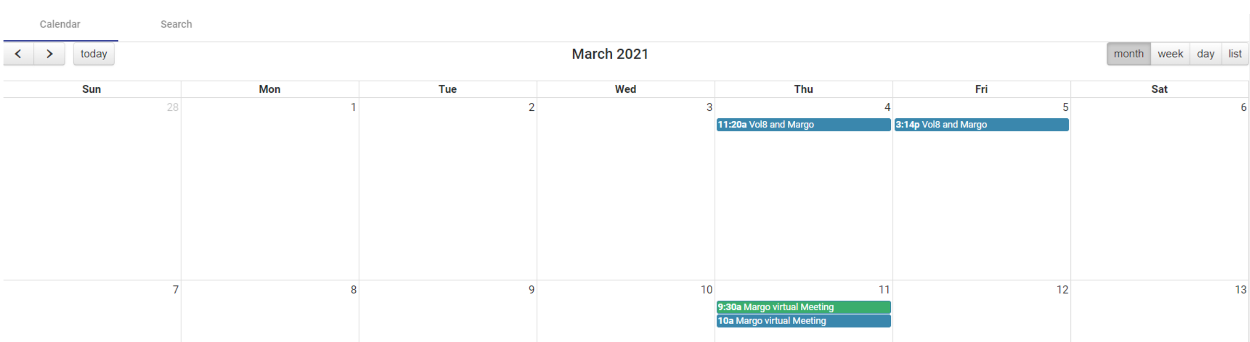
You can also browse or search for mentors like you can mentees:



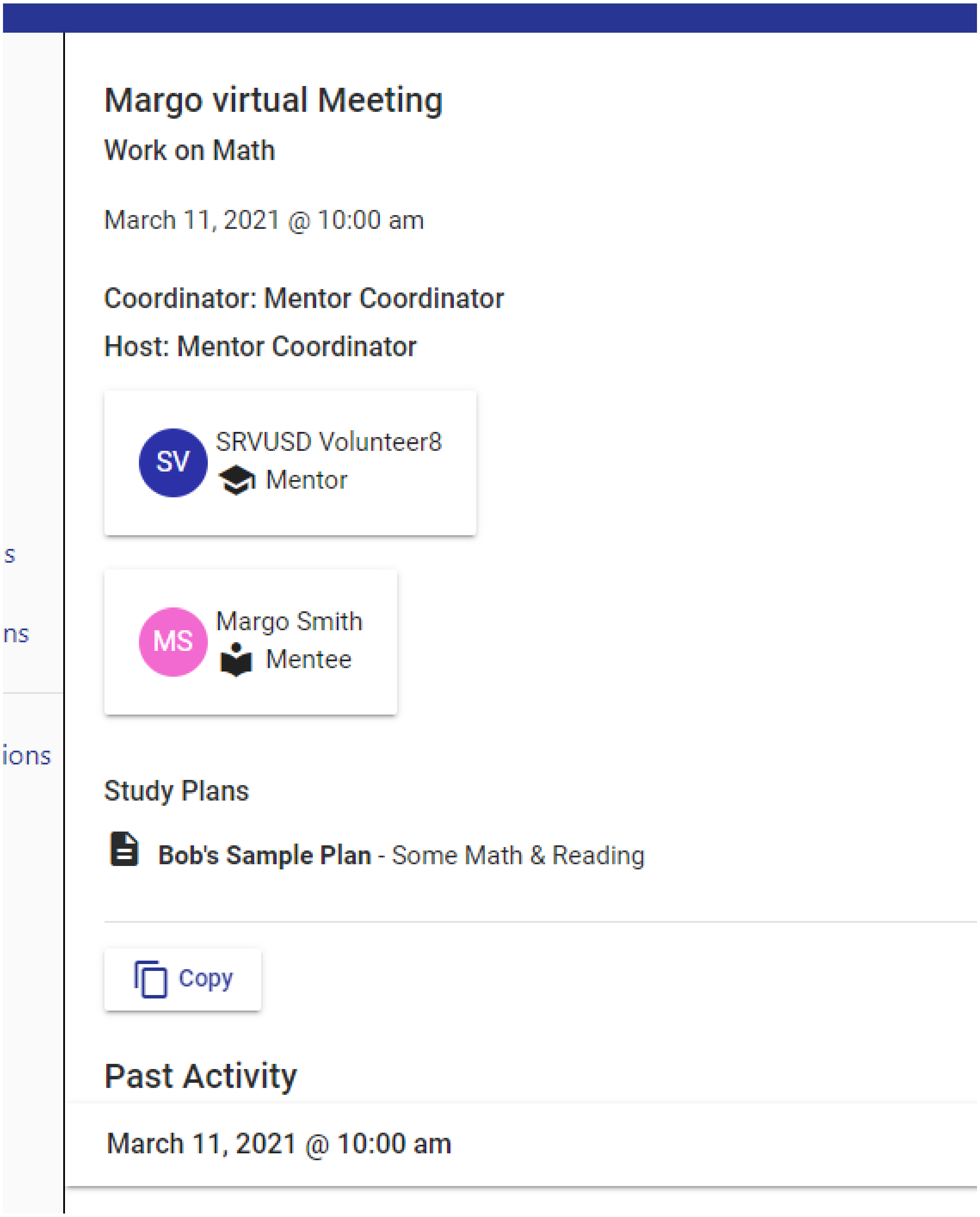
These options are set by the mentor when they fill out their Virtual Profile in order to be pulled into the platform.

My Meetings

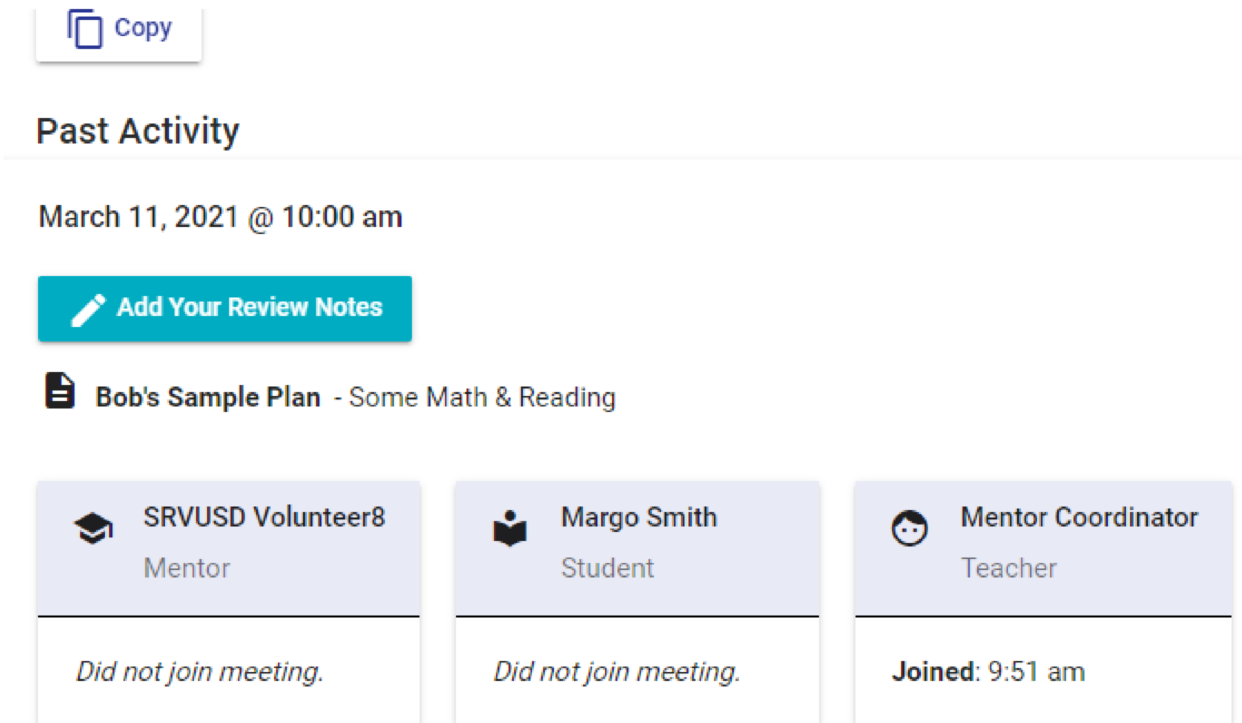
You can view or schedule meetings from My Meetings



Click on a meeting to view it’s details:

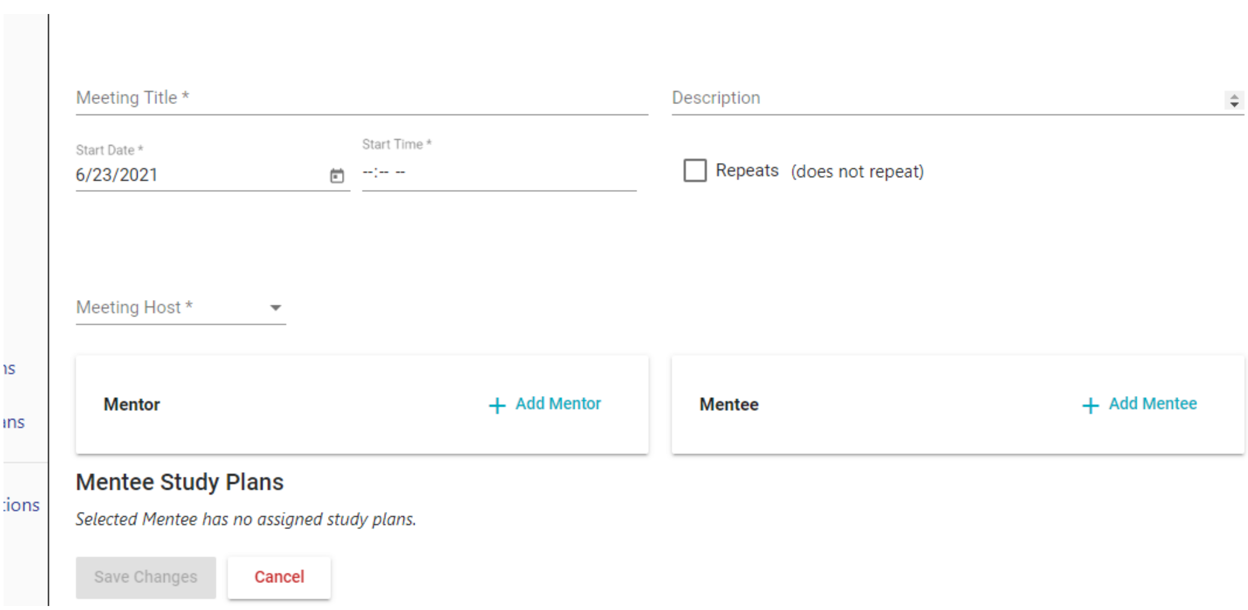


Click Past Activity and you will be able to view the times that participants joined, and any review notes that were left:



In the right hand corner is a button saying Join. Five minutes before and up to thirty minutes after the meeting time, this can be clicked, to launch Zoom. If the participant is the meeting host, it will instead say Start.

To set up a meeting, click the day on the calendar:



Fill out the details, then click Save Changes.

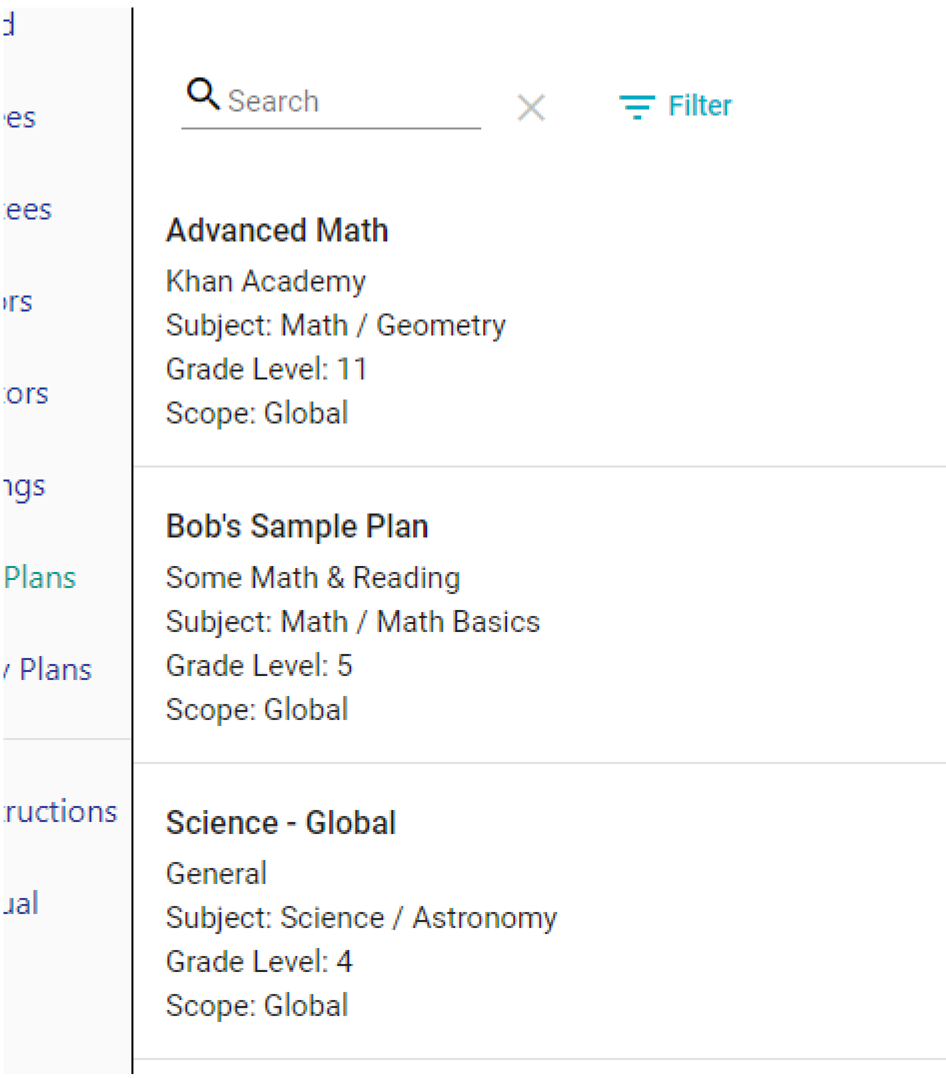
Either the mentor or a coordinator can be the meeting host. The first meeting between a mentor and mentee must be set up by the coordinator, but subsequent meetings can be scheduled by the mentor if you choose to give them that ability (see, My Mentors) If a mentee has Study Plans (next section) then you can choose to assign them to a particular meeting.

Matching on the virtual platform is very informal. Once a mentor and a mentee have had one meeting, they will be able to see each others details on their My Mentors and My Mentee pages (mentors only have Mentees, mentees only have Mentors)

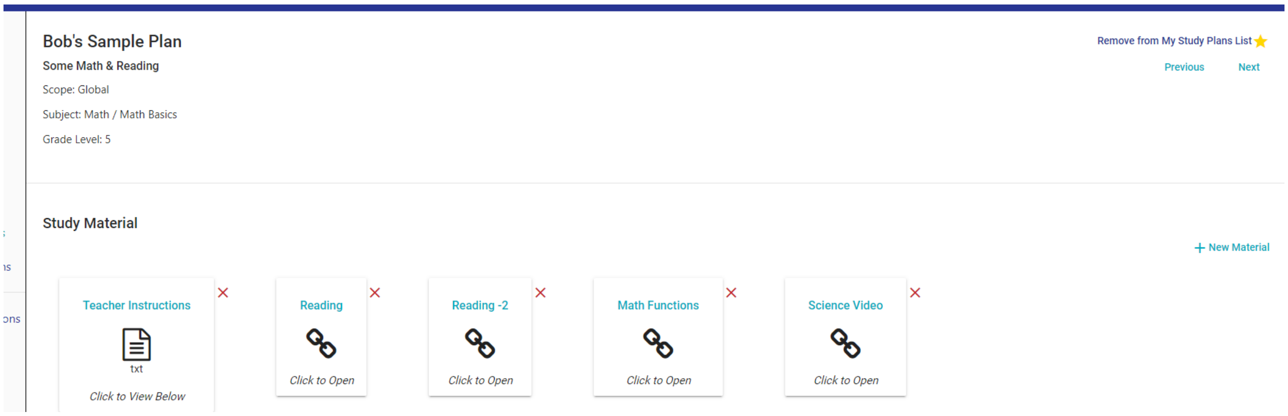
My Study Plans

One feature of the virtual platform is the ability of the coordinator to provide Study plans to a mentee that they want the mentors and mentees to go over.

You can view these by clicking My Study Plans:

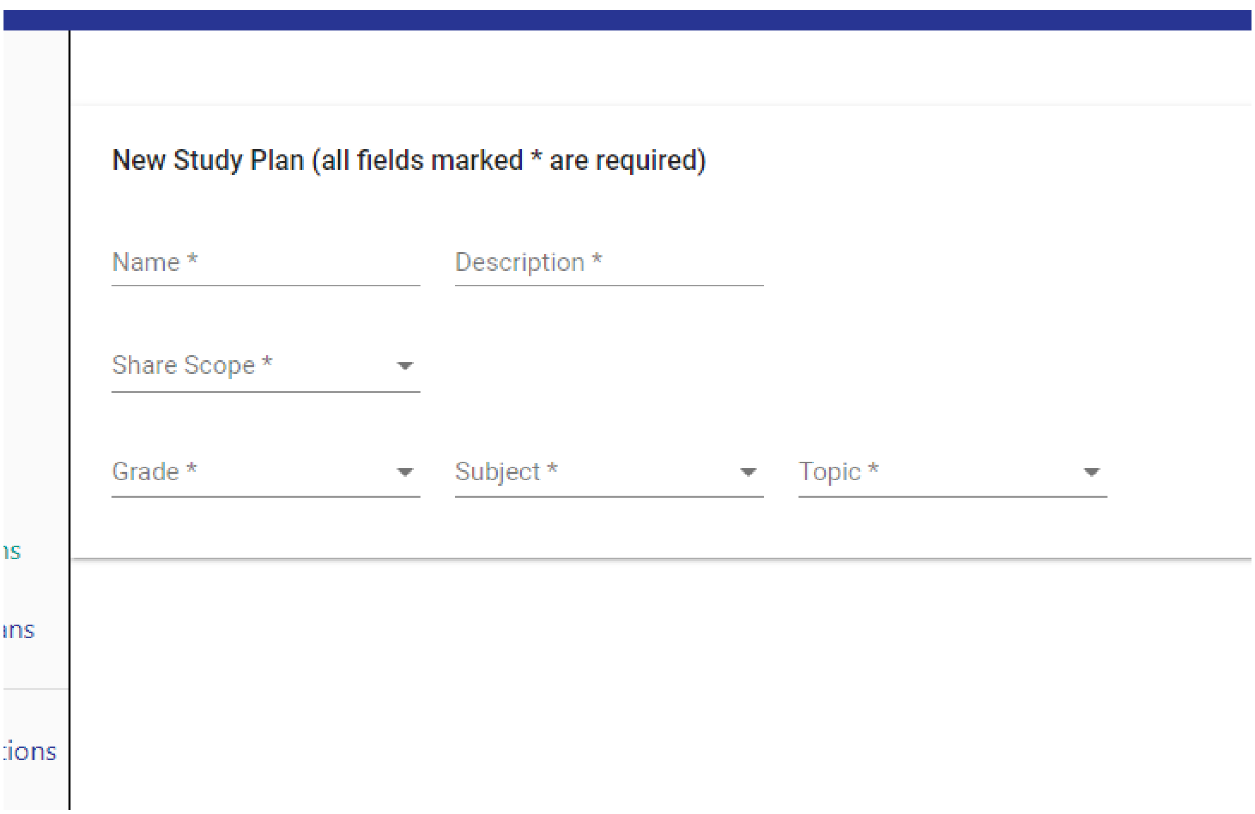


And then clicking the study plan:



New material can be added with the +new material button. Material can be links (to Youtube, Khan Academy, etc), documents (PDF, DOC, etc), instructions, etc.

A new study plan can be created by clicking my Study Plans, then +New Study Plan in the upper right hand side.



(SAVE is in the upper right hand side)

Study plans can be assigned to mentees by first locating them on My Mentees, opening their profile and selecting the Study Plans tab, then clicking +Assign Study Plan on the right side.

Find Study Plans

This final option allows you to browse/search for a study plan uploaded by another coordinator.

At the bottom of the navigation bar, you will also find a smaller version of this manual and instructions on the use of Zoom