ORV!D

OREGON VOLUNTEERS IN DISASTER

ORGANIZATION GUIDEBOOK

Updated July 2024

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WELCOME

Congratulations for choosing Oregon Volunteers in Disaster (ORVID) as your volunteer management platform. With this comprehensive guidebook, we aim to equip you with the knowledge and skills to efficiently navigate and utilize our software.

About this Guide

Throughout this guidebook, you will find step-by-step instructions, visual aids, and videos to guide you through the ins and outs of our software. We have structured the content in a user-friendly manner to ensure that you can learn at your own pace and in a way that suits your learning style.

What You Will Learn

- Get started with the basic setup and configuration of your account.
- Learn how to navigate the user interface and access different and features.
- Understand how to post volunteer opportunities.
- Discover how to schedule volunteers, approve hours and review qualifications.
- Learn how to access data and reporting to make informed decisions.

Your Success is Our Priority

We understand that adopting a new software system can be both exciting and challenging. Rest assured, OregonServes is here to assist you every step of the way. If you encounter any questions or roadblocks, please don't hesitate to reach out to us at hecc.orvid@hecc.oregon.gov.

Begin your ORVID journey by diving into this guidebook. Embrace the learning process and explore the software's capabilities to unleash its full potential for your organization's success.

We believe that with the right tools and training, you will become a confident and proficient user, significantly increasing your organization’s capacity and productivity.

Thank you for choosing ORVID, we look forward to working with you.

Best regards,
OregonServes, State Service Commission

ORVID OVERVIEW

When disasters strike, every minute counts, and the effectiveness of disaster relief efforts heavily relies on well-organized, volunteer response efforts. As a partner in Oregon's Emergency Response Plan for Volunteer and Donations Management, OregonServes is proud to introduce Oregon Volunteers in Disaster (ORVID). ORVID is an all-in-one volunteer management system, bringing together volunteers and essential disaster response organizations.

How it Works

Volunteers can create a comprehensive profile, highlighting their expertise, availability, and areas of interest. While on the other end, disaster response organizations can post specific projects and opportunities, detailing the skills required and the location of each project.

Who Can Use ORVID

ORVID is ideal for emergency managers and various organizations active in disaster including government agencies, non-profits, and tribal organizations. ORVID is designed to support the recruitment and coordination of spontaneous volunteers.

"Spontaneous volunteers are not part of a recognized voluntary agency and often have no formal training in emergency response. Spontaneous volunteers are members of the public who self-mobilize to act during or following an emergency" (FEMA).

Watch the video below to learn more.

Capabilities

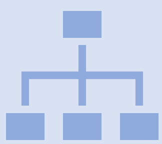
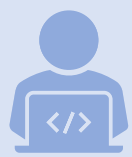
ORVID TOP FEATURES		
VOLUNTEER APP Find opportunities, check-in and track hours with an intuitive mobile app.	**HOURS TRACKING** Track every volunteer hour accurately with automated tools and pre-built reports.	**VOLUNTEER CHECK-IN** Check-in is a snap with the check-in kiosk, mobile app and automated reminders.
SCHEDULING Volunteer self-scheduling and simple tools to manage events and opportunities.	**VOLUNTEER WAIVERS** Protect your organization. Collect digital liability waivers and e-signatures.	**EVENT MANAGEMENT** Gather RSVPs, register volunteers, and promote events with custom pages.
GROUPS AND TEAMS Boost engagement and impact with streamlined group management.	**VOLUNTEER PROFILES** Personalized profiles display interests, skills, impact and achievements.	**BACKGROUND CHECKS** Vet volunteers with integrated background checks.

- **Mobile Volunteer App:** Stay connected and engaged with your volunteers on the go with our user-friendly mobile app.
- **Scheduling Made Easy:** Simplify volunteer scheduling with our intuitive tools. Create shifts, invite volunteers, and ensure everyone is on the same page with automated reminders and updates.
- **Hours Tracking:** Accurately monitor volunteer hours and contributions. Keep a comprehensive record of each volunteer's commitment, enabling recognition and accurate reporting.
- **Waivers & e-signatures:** Streamline the administrative process with our digital waivers and eSignatures. Ensure legal compliance while reducing paperwork and saving time.
- **Effective Email Messaging:** Communicate with volunteers seamlessly through our integrated email messaging system. Send updates, announcements, and reminders with ease.

- **Volunteer Check-in:** Facilitate efficient volunteer check-ins. Enhance attendance tracking and optimize your team's efforts with a simple check-in process.
- **Comprehensive Volunteer Profiles:** Access detailed volunteer profiles with key information, skills, and interests. Tailor opportunities to match each volunteer's strengths for a fulfilling experience.
- **Exportable Reports:** Gather valuable insights and analytics with our exportable reports. Make data-driven decisions, measure impact, and share progress reports with interested parties.

User Roles

There are three main user roles and each one has different features and capabilities. The three user roles are: Program Manager, Program Facilitator and Volunteer. See the chart below to see what each user can do.

ORVID USER ROLES		
PROGRAM MANAGER	**PROGRAM FACILITATOR**	**VOLUNTEER**
		
A Program Manager can add and manage opportunities and events on behalf of their organization	A Program Facilitator helps oversee the program and opportunities	A Volunteer can find, sign-up, track and follow opportunities and programs.
Program Managers can…	Program Facilitators can…	Volunteers can…
• **View, add and edit** volunteer’s info, hours, and responses. (Their program(s) only) • **Launch the Kiosk** for volunteer check-in and approve (or deny) volunteer hours • **View, vet and approve** qualifications submitted by potential volunteers in the program • **Assign** user groups to their program opportunities	• **Review** important information such as who’s volunteering, available opportunities and volunteer qualifications • **Export** data for reporting • **Monitor** the Check-In Kiosk	• **Search** for opportunities by interest, location, dates and more • **Sign-up** for an opportunity as an individual or as a team • **Submit** materials specifics to qualifications if required • **Receive** email confirmations and reminders after

• **Create, manage, edit and export** users and teams, which can show data and details on their volunteerism in the program • **Send** their own email blasts to their assigned users		signing up for an opportunity • **View and download** their volunteer resume to share impact with employers, teachers and friends

GETTING STARTED

Account Creation

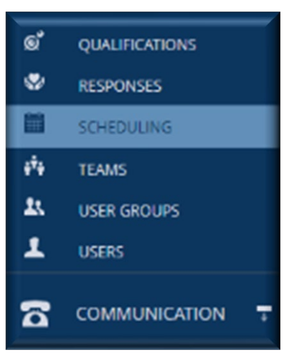
If your organization does not already have an account, you will need to request one by completing this form. Once submitted, you will receive an email confirming your account with login instructions.

Logging In

To begin, navigate to https://redioregon.galaxydigital.com/user/login/ and you'll be presented with the login screen. Enter your username and password that you set up in the account creation process. If you encounter any login issues, click forgot your password or contact hecc.orvid@hecc.oregon.gov.

Navigation

Upon successful login, you will land on your organization Dashboard on the Schedule module. From there, you can use the menu bar on the left-hand side of the screen. This menu contains links to the main modules and sections within the software.



Module Overview

Here is a brief overview of what each module does.

MODULE	PURPOSE
Edit Organization	Manage your organization’s profile.
Events	Add and manage events.
Hours	Review volunteer hours, approve or deny hours, check in volunteers, see who is checked and launch the Check-In Kiosk.
Opportunities	Add and manage opportunities
Qualifications	Review qualifications submissions, approve or deny them, and email volunteers.
Responses	View volunteer responses, add responses on behalf of volunteers, and add volunteer hours.
Scheduling	View your shifts, schedule volunteers and view user responses.
Teams	View teams, add a team, email team members.
User Groups	View assigned user groups and add opportunities and volunteers to them.
Users	View and edit your users, add new users, filter users based on specific criteria.
Communication	Send email blasts to your users

AUTOMATIC SITE NOTIFICATIONS

ORVID has a number of automatic notifications set up that go out to Volunteers and Program Managers.

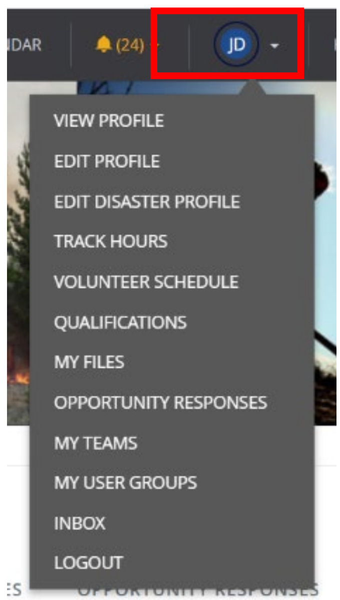
How it Works

OregonServes is the only the one that can set up and edit the notifications. Volunteers and Program Managers will receive automatic notifications via email related to their events and opportunities.

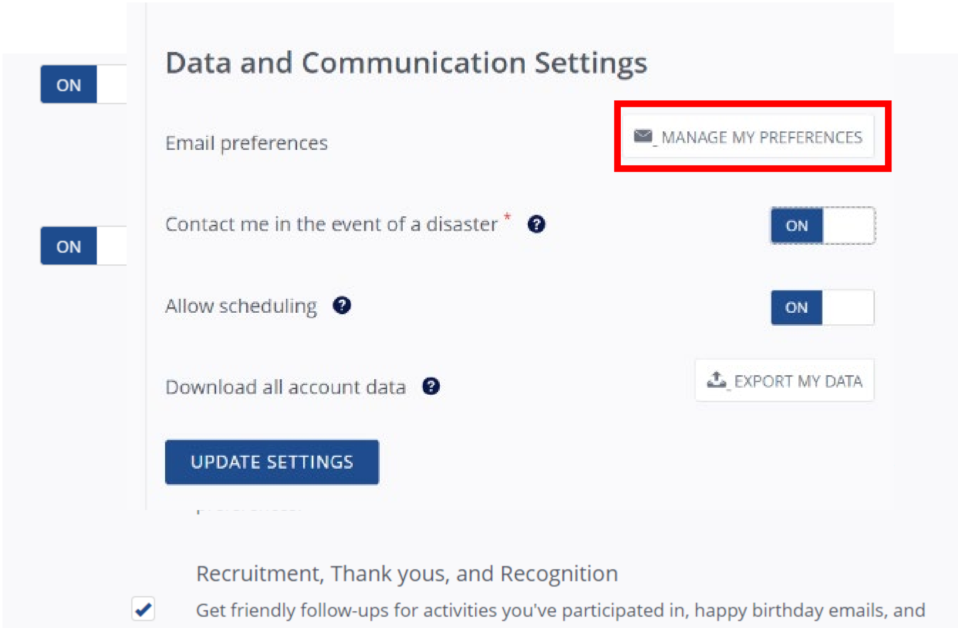
How to Manage Email Preferences

Volunteers and Program Managers can change their email preferences by editing their profile.

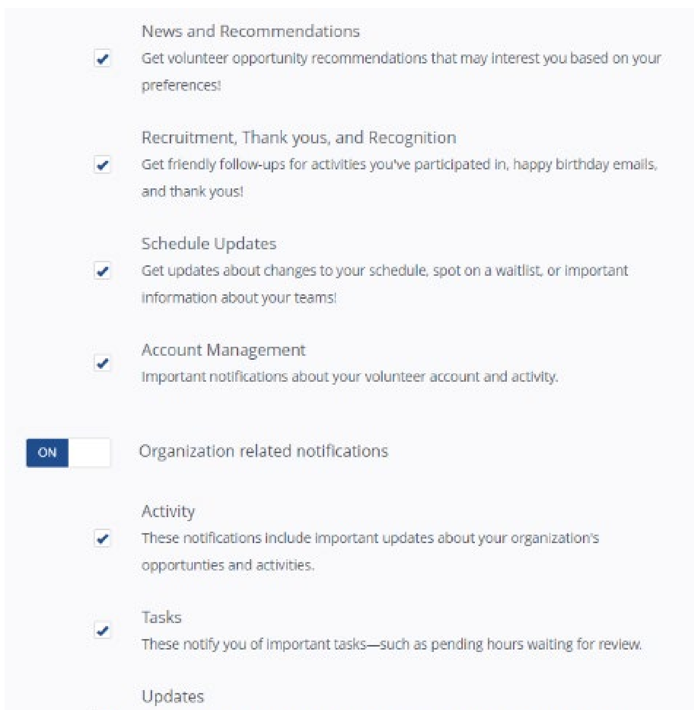
1. Click on the circle with your **initials.**
2. Scroll down to Edit **Profile.**



3. Scroll down to **Data and Communication Settings.**
4. Click **Manage My Preferences.**



5. Turn on or off all Notifications or select individual ones.



6. Click **Save My Preferences.**

Active Notifications

Here are the active notifications and what they do.

VOLUNTEERS	
NOTIFICATION	**DESCRIPTION**
Upcoming Opportunity Reminder	Reminds volunteers one week before and one day before a need they responded to begins.
Upcoming Event Reminder	Remind volunteers one week before and one day before an event they respond to begins.
Benchmark Award	Sent to volunteers when they achieve a benchmark.
Notice of Unregistered Team	This message is sent to team leaders when their team response is removed, either by the team leader unregistering the team, or by OregonServes removing the response from the back of the site.
Event Follow-Up Survey	Goes to volunteers three days after the conclusion of an event to which they RSVP's "Yes."
Event RSVP Notice	Goes to volunteers who submit a "Yes" RSVP to an event.
Unregistered Event Attendee Confirmation	Sent to volunteers who have unregistered from an event.
Volunteer Weekly Digest	Weekly email that informs volunteers that there are new opportunities and events that may interest them, based on their interests and fanned agencies.
Volunteer Hours Declined	Sent to volunteers when their hours are denied.
Invitation to Complete Your Profile	You can send this email to a volunteer if you create their account on their behalf. It is intended to invite them back to the site to complete the parts of the profile that you did not fill in for them.
Invitation to Join the Site and a Team	This message is sent to individuals when a team leader attempts to add them to a team but the person does not have an account or the necessary qualifications. The message includes a link that will take a recipient to the site, where they can register and join the team. If qualifications (such as signing a

	waiver) are required, the new user will first need to be approved for qualifications before joining the team.
Invitation to Join a Team	Team leaders can trigger this message to individuals when they attempt to add someone to a team but that person does not have the necessary qualifications. This message includes a link that will point the recipient to the site, where they can join the team once their qualifications are approved.
Opportunity Response Thank You	Thank you message sent to volunteers when they respond to an opportunity.
Unregistered Opportunity Volunteer Confirmation	This confirmation is sent to a volunteer who has unregistered from an opportunity.
Notification of Updated Opportunity	This message can be sent to volunteers when an opportunity or shift is updated. Messages will only be sent to volunteers with an active response.
Notice of Expired Qualification	Sent to volunteers when one of their qualifications expires.
Notice of Qualified Status	Sent to volunteers when they are marked as "Qualified" based on one of their qualification answers.
Notice of Unqualified Status	Sent to volunteers when they are marked as "Not Qualified" based on one of their qualification answers.
Notice of Resubmit Status	Sent to volunteers when they need to resubmit their qualification.
Qualified for Opportunity	Sent to volunteers after they have interacted with an opportunity they are not qualified for and have been approved for all relevant qualifications on that opportunity.
Schedule Assignment	Sent to a volunteer when a Program Manager schedules them for one or more shifts. The "Message" field will contain all relevant information for the shift(s).
Schedule Recruitment	Sent to volunteers when a Program Manager wants to let them know about a need they can sign up for. This message is triggered from the Program Manager's Schedule area.
User Deactivate Message	Sent to volunteers after they deactivate their account.

New User Welcome	Sent to new volunteers when they complete their registration.
User Password Reset	Sent to volunteers when they request a password reset.
Welcome to the Team	Response that is sent out to new team members, letting them know they have been added to a team.
Need Response Follow-Up Survey	Sent to volunteers who have responded to an opportunity.
Volunteer Self Check-In	Emailed to volunteers at 6 a.m. Eastern Time on the day of their scheduled shifts, and they can use it to schedule their shift check-in and check-out times. This notification is only sent for shift-based needs (Recurring or Custom Shifts).
Volunteer Team Created	This message is sent to a user when a team leader adds the user to a team and enters their email address into the system for the first time.
Waitlist: Volunteer Added	Sent to a volunteer when they add themselves to a waitlist, this message confirms that they have been waitlisted.
Waitlist: Space No Longer Available	Sent to waitlisted volunteers who were previously notified about an opening. This message is triggered when the space that was originally made available is taken by another volunteer.
Waitlist: Space is Open	This message is sent to waitlisted volunteers when a volunteer spot opens up for the need or shift they've been waitlisted for.
Waitlist: Volunteer Removed	This email is sent to a user when they remove themselves from a waitlist.
Need Participation Thank You-One Day After	Sends a thank-you email to all volunteers for an opportunity that occurred on a specific date. This email goes out one day after the date of the need or shift. It is not sent for needs with a duration of Runs Until or Ongoing, as those durations are not date-specific.
Notify Users Week After RSVP Event Ends	Sends a thank you email to all volunteers of an RSVP event a week after it's ended.

PROGRAM MANAGERS

NOTIFICATION	DESCRIPTION
Opportunity Expiration Notification	Notification that goes out 7 days before and day of need expiration.
Opportunity Happen on Notification	Notification that goes out seven days and one day before a need is scheduled to occur.
Event RSVP Notice	Notifies an event owner that a volunteer as RSVP'd "Yes" to their event.
Notification of Unregistered Event Attendee	Sent when a volunteer unregistered from an event.
Program Manager's Weekly Digest	Weekly email to inform Program Manager's of expiring needs, upcoming events and pending hours.
Notification of Unregistered Volunteer	Sent when a volunteer unregistered from a posted opportunity.
Registration Closed	This message is sent to organization the day registration is closed on a need. If the Program Manager has multiple needs with registration closing on a given day, then they will get an email for each need.
Notification of Need Response	Alerts a Program Manager that a volunteer has responded to an opportunity.

BADGES AND BENCHMARKS

Volunteers earn badges for contributing their time and skills.

How it Works

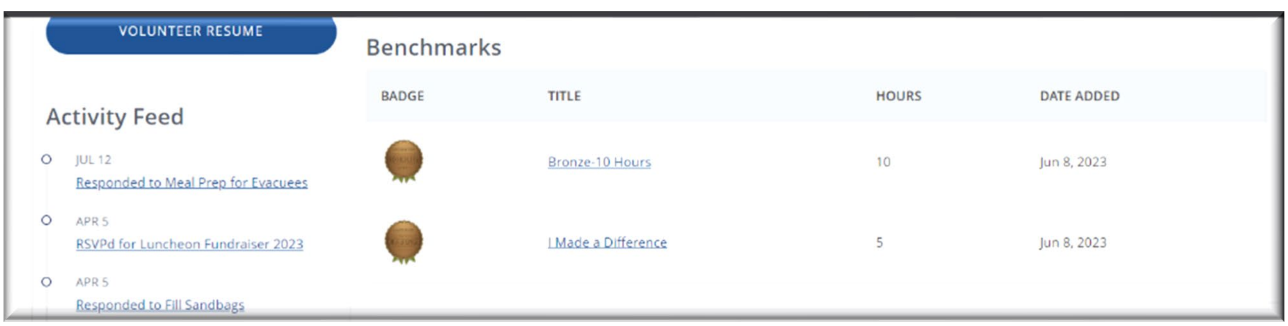
Recognizing and appreciating the efforts of volunteers is essential for fostering a positive and motivated volunteer community. Benchmarks and badges are effective tools to acknowledge and celebrate the contributions of volunteers. These mechanisms not only provide a sense of achievement but also promote continuous engagement and dedication.

When a volunteer reaches a benchmark, they automatically earn the badge associated with that benchmark. The software checks for hours submitted every 24 hours and awards badges to those who have met a benchmark's requirements.

Here's an overview of badges available when volunteers reach certain benchmarks.

BENCHMARK	BADGE
5 hours	Bronze-I Made a Difference
10 hours	Bronze
20 hours	Bronze-Outstanding Service
30 hours	Silver-Community Champion
50 hours	Silver-Outstanding Service
100 hours	Gold

Here is what it looks like from the volunteer perspective.



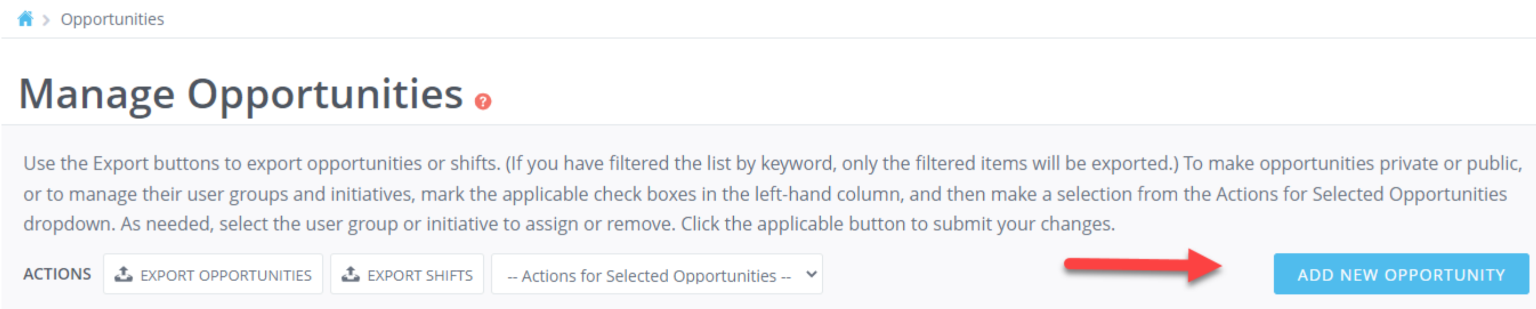
Volunteers can share their badges on Facebook and Twitter by clicking on the badge title.

CREATE AN OPPORTUNITY

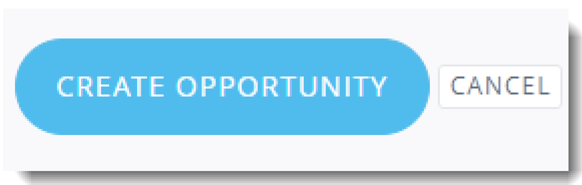
An Opportunity is a way to recruit volunteers for a specific need in the community.

[Watch this short video on how to create an Opportunity](#).

1. Go to **Volunteerism > Opportunities.**
2. Select **Add New Opportunity.**



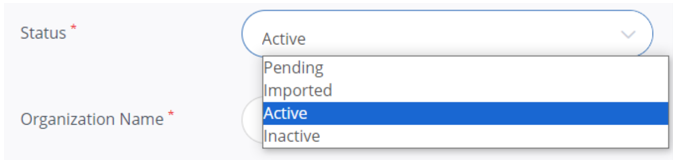
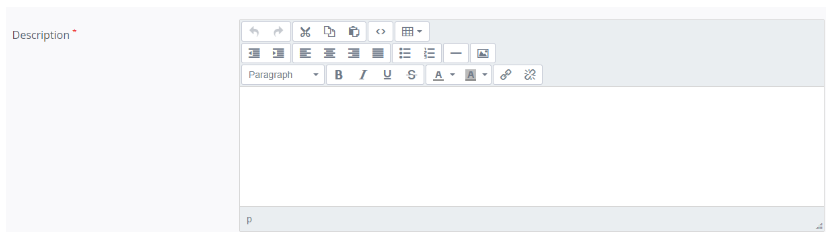
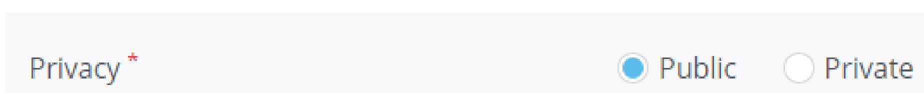
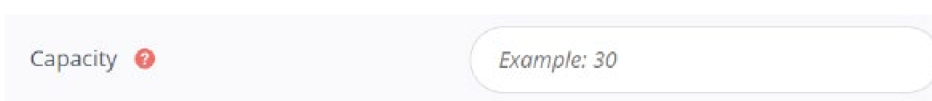
3. Complete the **Create Opportunity** form.
4. Click **Create Opportunity**.



You can always update an Opportunity if anything changes after you've created one.

Here are the different selections you see on the **Create Opportunity** form and what they do.

Topic	Description
Status	You have three status options to choose from in the dropdown. • Active means you're ready to post and share your volunteer opportunity publicly on your site. Volunteers will be able to see your opportunities and respond to them when they access your site. • Pending means you're not quite ready to post and share them just yet. You can start creating an opportunity and select Pending if you want to keep it private until you're ready to post it to your site. • If an opportunity has passed or you no longer want to have it on your site, you can set it to inactive. When an opportunity is made inactive, it no longer appears on your site for volunteers. Volunteers also can't submit hours to that opportunity once it's made inactive. You can

<table>
<tr><td></td><td>reactivate an opportunity at any time by changing the status back to active.
</td></tr>
<tr><td>Description</td><td>The description area for your opportunities is important because it's where you can:
Share your program or organization's goals, history, impact, mission, purpose, and any additional information you want your volunteers to know about for that opportunity
Highlight what volunteers might be responsible for if they respond and are accepted for that opportunity.
Include attachments, links, and videos to really showcase what the volunteers can expect out of that opportunity!
</td></tr>
<tr><td>Privacy</td><td>You can set the privacy of your opportunities to public or private.
Public means anyone visiting your site can respond to or view the opportunities you share.
Private opportunities are great for when you want to assign an opportunity to a specific User Group or team. You'll be able to share a link to the private opportunity.
</td></tr>
<tr><td>Capacity</td><td>This field lets you establish the number of volunteer spots needed for an opportunity.
</td></tr>
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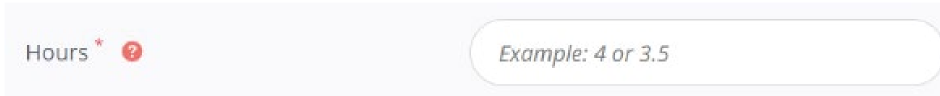
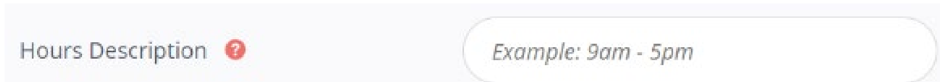
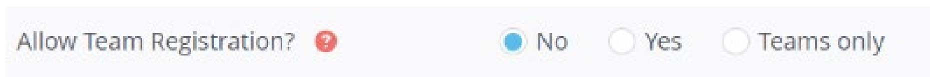
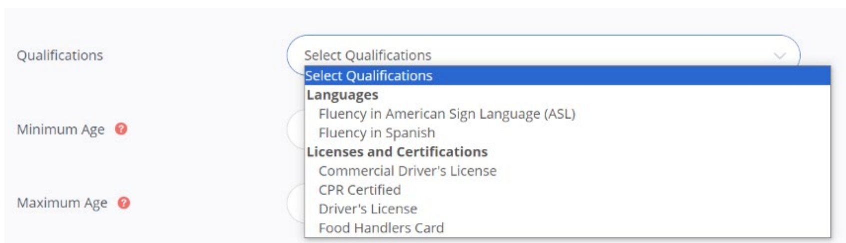
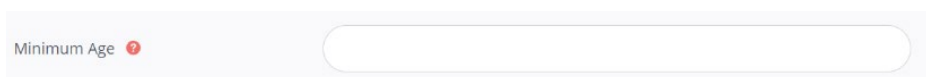
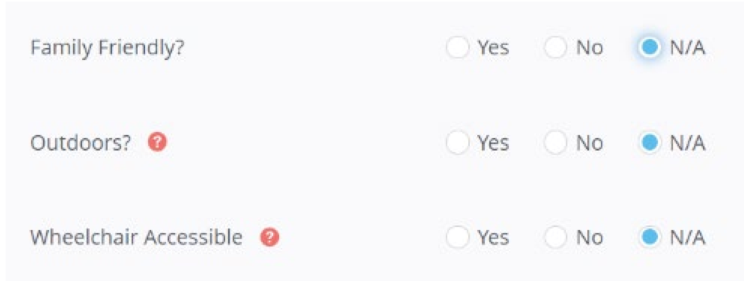
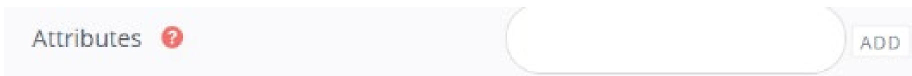
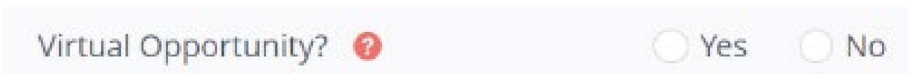
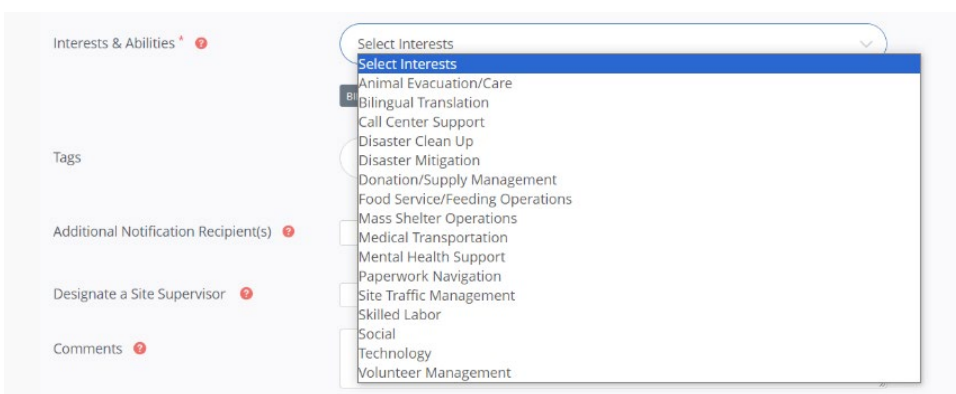
Hours	This is the number of hours your volunteers are expected to contribute to the opportunity. 
Hours Description	This is the exact time an opportunity takes place (e.g., 8 am - 6 pm). 
Allow Team Registration	• Check **No** if you only want individual responses for the opportunity. • Check **Yes** if you want to allow multiple people to be signed up in a team for the opportunity. • Check **Teams Only** if you only want to allow teams to register. 
Qualifications	Add required qualifications to your opportunity. 
Minimum Age	You can establish the minimum age for an opportunity. If you leave this field blank but enter a maximum age below, this field will display a '0' and an 'and younger' age range in the volunteer view. Example: '21 and younger'. 
Maximum Age	You can establish the maximum age for an opportunity. If you leave this field blank but enter a minimum age above, this field will display '120' here and an 'and up' age range in the volunteer view. Example: '21 and up'. 
Family Friendly Outdoors Wheelchair Accessible	For these three settings, you can select Yes**,** No, or Not Applicable (N/A)**.** • These are great ways to help your volunteers prepare for the event and know what to expect when they arrive. • Volunteers can also filter the opportunities page by these settings.

	
Attributes	Here you can include additional details about the opportunity, like: • We'll provide snacks halfway through each shift. • Bring an apron. • Wear closed-toe shoes. 
Virtual Opportunity	You can select Yes here if the opportunity includes things that can be done from home or other off-site locations. 
Address	The address is used to share a map with volunteers when they're searching for opportunities. • This makes it easier to match volunteers to opportunities near them.
Zip Code	Be sure to establish the primary Zip Code where the opportunity will occur. • If your opportunity occurs across multiple zip codes, we recommend that you still use the primary zip code here or create additional opportunities for the other locations.
Interests and Abilities	The interests that you assign here help your volunteers search for and match with your available opportunities. 

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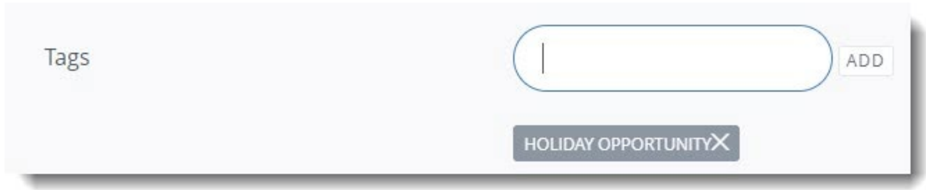
<tr>
<td>Tags</td>
<td>Tags are a great way to share your opportunities with volunteers and make it easier for volunteers to search for your opportunities by specific criteria or interests.

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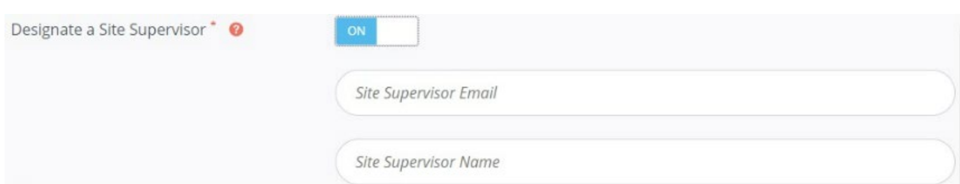
<tr>
<td>Additional Notification Recipients</td>
<td>In this field, you can add emails of individuals you want to be notified when an opportunity has a response.

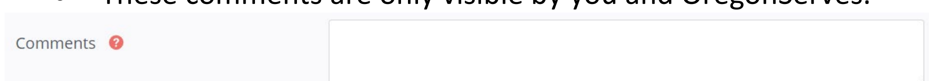
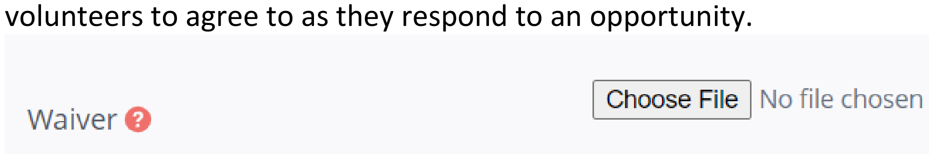
To use this feature, toggle the button On and type in the email addresses in the field that populates.
The emails must be entered on individual lines.


</td>
</tr>
<tr>
<td>Designate a Site Supervisor</td>
<td>You can designate a site supervisor, which displays to volunteers when they interact with an opportunity and appears on the FEMA report.

When you toggle this On, fields populate to enter the name and email address of an individual you wish to assign as the site supervisor.


</td>
</tr>
<tr>
<td>Comments</td>
<td>Comments are hidden from the public and other users.

These comments are only visible by you and OregonServes.


</td>
</tr>
<tr>
<td>Waiver</td>
<td>Does your opportunity require waivers? Here you can upload a file for volunteers to agree to as they respond to an opportunity.

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

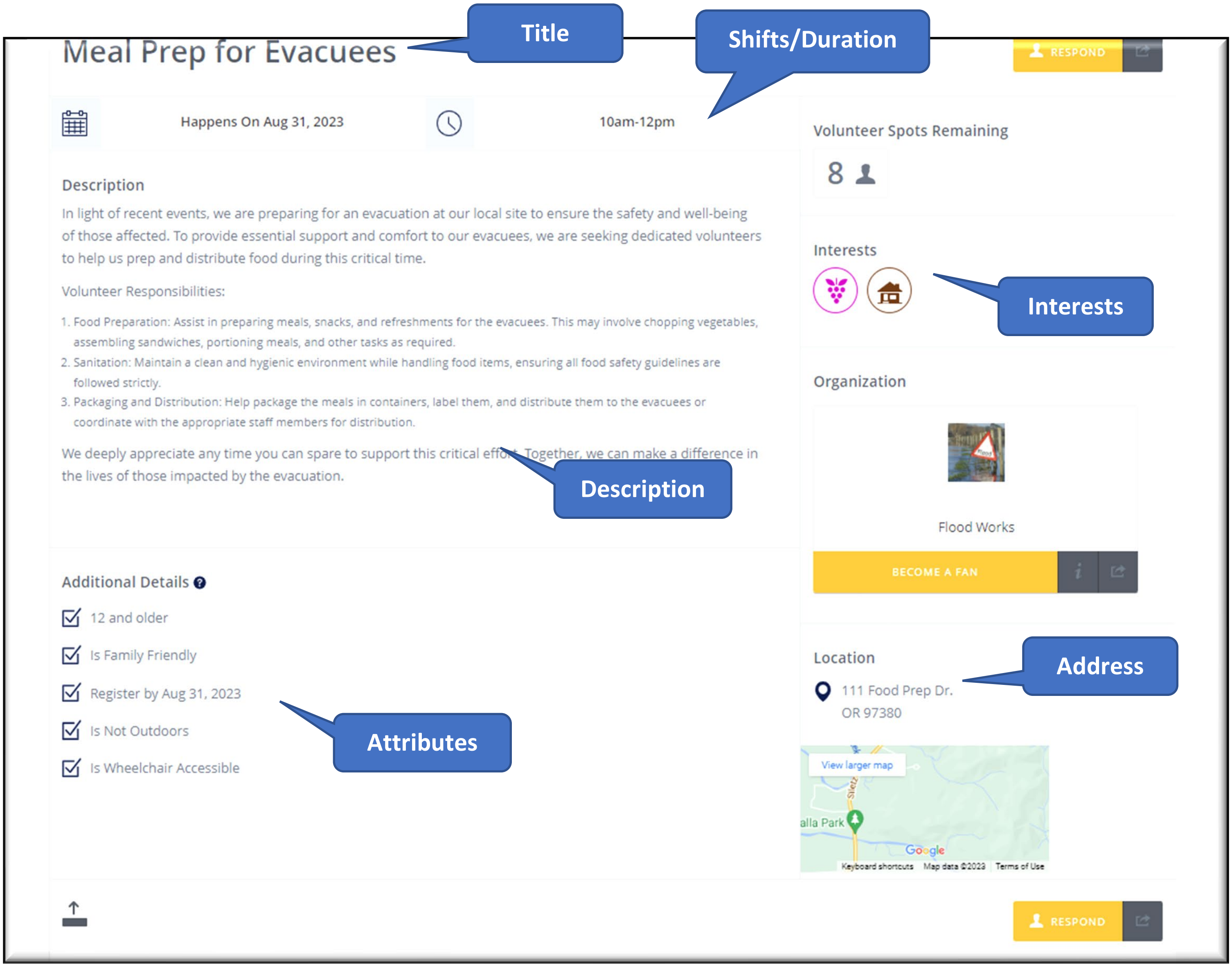
Remember to click the Create Opportunity button to save your changes!

How to boost engagement.

With the **Description** field, you can draw attention to what the Opportunity is and how volunteers will contribute to your mission. You can:

- Share the impact, goals, mission, and purpose of that Opportunity and the Organization it's connected to.
- Explain volunteer roles and responsibilities.
- Attach images or add links to videos or other online content that tells your story.
- Use the editor to draw more attention to the Opportunity.

Here is what the opportunity looks like from the volunteer's perspective.


Title
Shifts/Duration
Meal Prep for Evacuees
RESPOND
Happens On Aug 31, 2023
10am-12pm
Volunteer Spots Remaining
8
Description
In light of recent events, we are preparing for an evacuation at our local site to ensure the safety and well-being of those affected. To provide essential support and comfort to our evacuees, we are seeking dedicated volunteers to help us prep and distribute food during this critical time.
Volunteer Responsibilities:
1. Food Preparation: Assist in preparing meals, snacks, and refreshments for the evacuees. This may involve chopping vegetables, assembling sandwiches, portioning meals, and other tasks as required.
2. Sanitation: Maintain a clean and hygienic environment while handling food items, ensuring all food safety guidelines are followed strictly.
3. Packaging and Distribution: Help package the meals in containers, label them, and distribute them to the evacuees or coordinate with the appropriate staff members for distribution.
We deeply appreciate any time you can spare to support this critical effort. Together, we can make a difference in the lives of those impacted by the evacuation.
Interests
Interests
Organization
Flood Works
BECOME A FAN
Description
Additional Details
12 and older
Is Family Friendly
Register by Aug 31, 2023
Is Not Outdoors
Is Wheelchair Accessible
Attributes
Location
111 Food Prep Dr.
OR 97380
Address
View larger map
alla Park
Google
Keyboard shortcuts
Map data ©2023
Terms of Use
RESPOND

CREATE AN EVENT

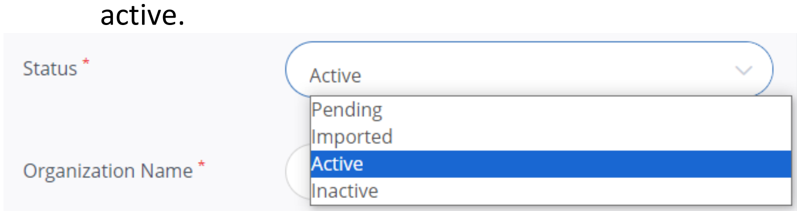
An Event is a public occasion sponsored or promoted by your organization, and to which the community is invited to attend. Events can include the option for people RSVP.

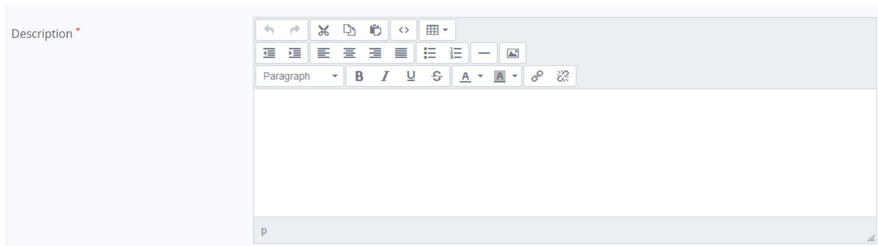
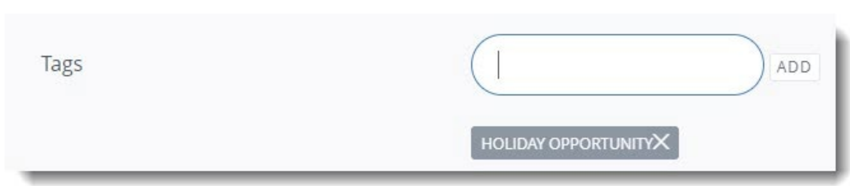
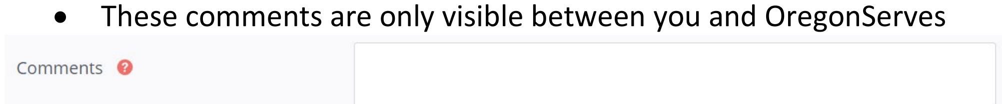
Note: An Event is not an Opportunity. An Event is a public occasion sponsored or promoted by an organization, and to which the community is invited to attend. Events can include the option for people to RSVP. Events are things like volunteer trainings, webinars, fundraisers, etc.

An Opportunity is a volunteer opportunity posted by an organization’s Program Manager. An Opportunity is where volunteers sign up to serve in their community, record and report their hours, and receive recognition for volunteering.

1. Go to **Volunteerism > Events.**
2. Click **Add New Event.**
3. Complete the form and click **Create Event.**

Here are the different selections you see on the **Create an Event** form and what they do.

Topic	Description
Status	You have three status options to choose from in the dropdown. • Active means you're ready to post and share your volunteer opportunity publicly on your site. Volunteers will be able to see your opportunities and respond to them when they access your site. • Pending means you're not quite ready to post and share just yet. You can start creating an opportunity and select Pending if you want to keep it private until you're ready to post it to your site. • If an opportunity has passed or you no longer want to have it on your site, you can set it to inactive. When an opportunity is made inactive, it no longer appears on your site for volunteers. Volunteers also can't submit hours to that opportunity once it's made inactive. You can reactivate an opportunity at any time by changing the status back to active. 
Title	Create a title.
Enable RSVPs?	Turn on to allow people to RSVP.
Description	The description area for your event is important because it's where you can:

	• Share your event’s goals, history, impact, mission, purpose, and any additional information you want your volunteers to know about for that event. • Highlight what volunteers might do or learn at the event. • Include attachments, links, and videos to really showcase what the volunteers can expect out of that event! 
All Day Event	Select if it is an all-day event.
Start Date/Time	Select the start date and time.
End Date/Time	Select the end date and time.
Event Time Zone	Select the US/Pacific time zone.
Event Contact	Include the contact person for the event.
Contact Email	Include the contact person’s email.
Contact Phone	Include the contact person’s phone.
Event Location	Include the event location such as church or school.
Address	The address is used to share a map with volunteers when they're searching for opportunities.
Zip Code	Be sure to establish the primary Zip Code where the opportunity will occur. • If your opportunity occurs across multiple zip codes, we recommend that you still use the primary zip code here or create additional opportunities for the other locations.
Tags	Tags are a great way to share your opportunities with volunteers and make it easier for volunteers to search for your opportunities by specific criteria or interests. 
Comments	Comments are hidden from the public and other users. • These comments are only visible between you and OregonServes 

CHECK-IN KIOSK

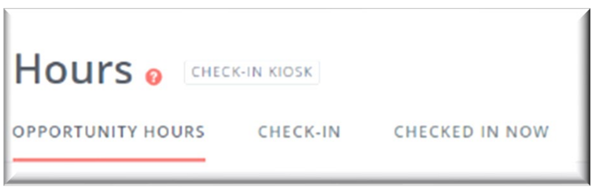
The Check-In Kiosk is a built-in application that allows Organizations to check-in and check-out volunteers on location.

You'll want to ensure that you launch the kiosk from a device that is easily visible and accessible to all volunteers checking in or out of it.

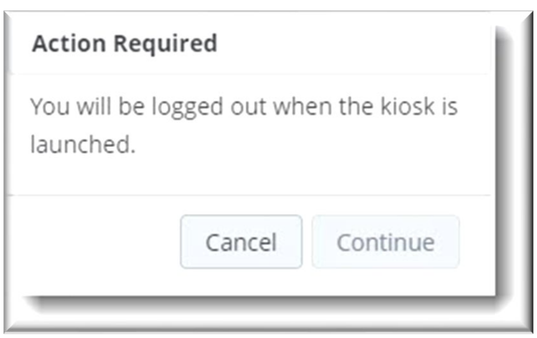
Note: Opportunities that do not have shifts will not show up in the kiosk. Those include opportunities with duration types of Flexible, Happens On, or Multi Date. These types of opportunities have unlimited capacity and volunteers spots available.

How to Launch the Check-In Kiosk

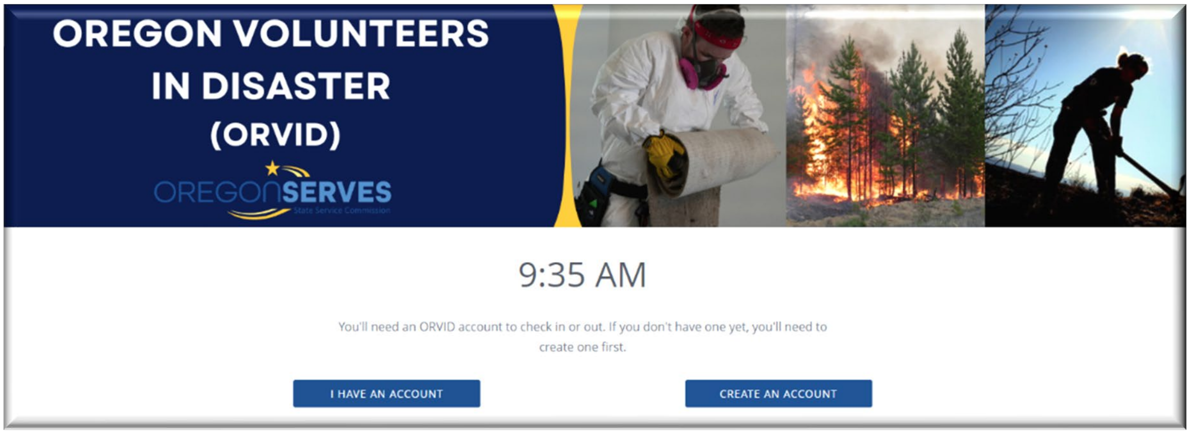
1. Go to **Volunteerism > Hours.**
2. Next to **Hours**, click **Check-In Kiosk.**



A warning pop up appears to let you know you'll be signed out of the site before accessing the kiosk.



3. Click **Continue** to be taken to the kiosk.
4. From there, you'll see the welcome screen of the kiosk.



Watch this video to see what it looks like from the volunteer perspective.

DATA AND REPORTS

Organizations can view and download real-time reports.

We know just how important reporting is for your organization. You can review and export reports about your opportunities and volunteers.

Report Types

Program Managers have access to the following reports.

OPPORTUNITIES	
REPORT TITLE	**DESCRIPTION**
Attendance Report	This report lets you see who attended an Opportunity they responded to as well as how many hours they have pending and approved for that Opportunity. You can also see what Team they belong to if applicable. This report is great for keeping track of your volunteers' contributions and attendance.
Opportunity Needs	This report is great for comparing and reviewing which of your Opportunities are getting the most attention. You can use this to determine which Opportunities might need some attention and which ones you can mimic that are successful.
FEMA: Volunteer Data for Reimbursement	This report helps you keep track of volunteer hours and impact during or after an officially declared disaster. The Federal Emergency Management Agency (FEMA) requires this information for requests of reimbursement.

USERS	
REPORT TITLE	**DESCRIPTION**
Custom Registration Question Metrics	Curious about how volunteers are answering your custom registration questions? You can see who responded, their answers, their lifetime hours, and the date they last logged on.
Qualification Status Review	This report is great for reviewing details about the qualifications assigned to your

	Opportunities. You can see their statuses, number of responses, when they were last updated and more.
User Group Member Metrics	This report lets you compare how active your user groups are and which ones might need a little encouragement to boost engagement. You can also see which user group member has submitted the most responses and check the number of hours that have been submitted too.

ACTIVITY REPORTS	
REPORT TITLE	**DESCRIPTION**
Daily Activity	Curious about your site's activity on a specific day? You can review how many Organization or Opportunity views you received on a specific day, the number of user logins, how many Opportunity responses your Opportunities received, etc. This report is great for seeing which days your Organization gets the most activity so you can plan when to release important information for your volunteers. You can filter by a specific day as needed and export the data to a PDF or spreadsheet.
Monthly Activity	Use this report to see details about activity in your Organization and Opportunities in a selected calendar month. See which months are the most active for your Programs and Opportunities. This report also lets you see how active you, your Program Facilitators, or your volunteers are. You can filter by a specific month and year and export the data to a PDF or spreadsheet.
Quarterly Activity	Use this report to see a quarterly breakdown of how active your Opportunities are. You can select a specific quarter and year, as well as export this data to a PDF or spreadsheet. **Note:** The three-month quarters start with January, April, July, and October. Ex. Q1 includes data ranging from January to March.

OregonServes can access additional reports that are available upon request. Those reports are:

DISASTER RESPONSE MODULE	
REPORT TITLE	**DESCRIPTION**
Volunteer Skills and Services	Use this report to quickly see which volunteers have the skills and services needed in the event of a disaster.

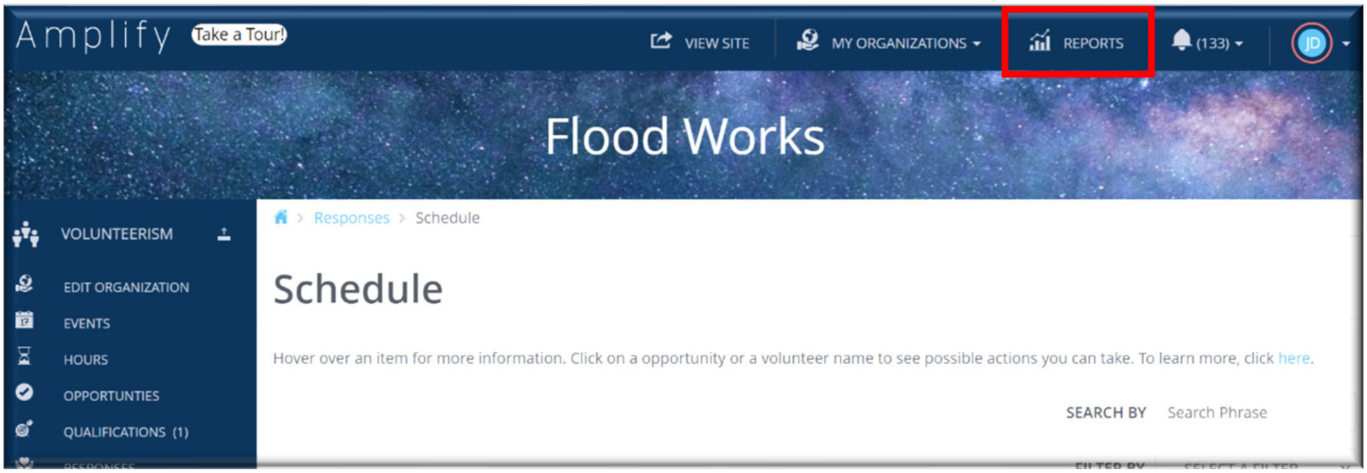
USERS	
REPORT TITLE	**DESCRIPTION**
Repeat Volunteerism User List	This report shows you data for volunteers with multiple responses to your Opportunities—great for seeing how active your volunteers are and who keeps coming back to contribute to your organization.

SITE ACTIVITY REPORTS	
REPORT TITLE	**DESCRIPTION**
Site Activity-By Interest	This report can be used to get a sense of what Interests are most important to your community. You will see the Interests being used on your site and how many Opportunities have this Interest, how many Responses and Hours have been added to Opportunities with each Interest, and how many users selected each Interest for their profile.

To request any of these reports, please complete this form.

How to Access Reports

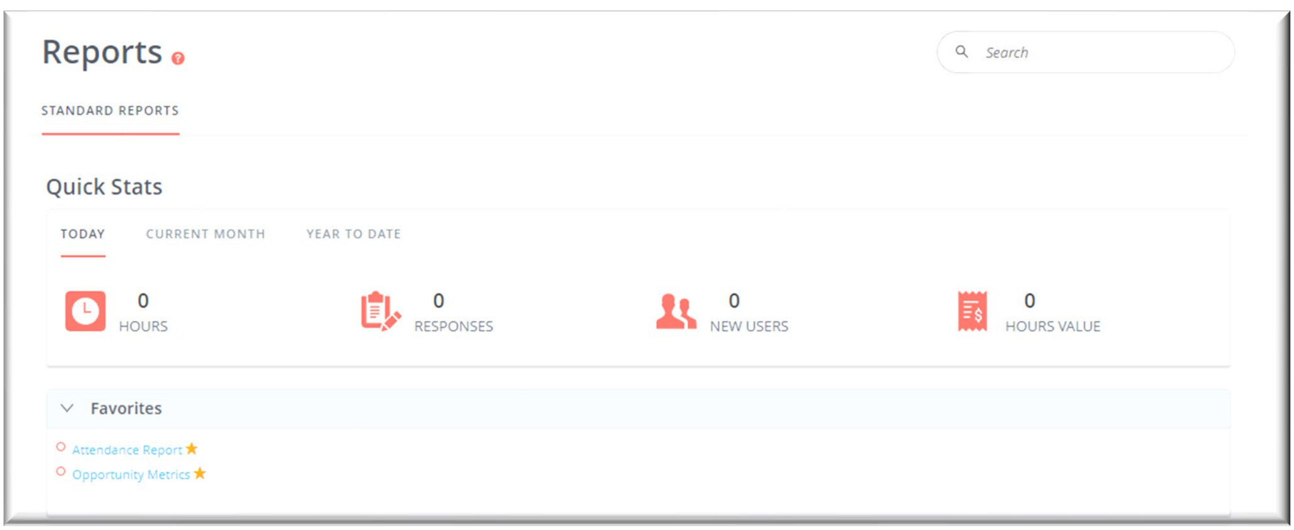
To access your reports, click the Reports button next to My Organization/s in the top menu of your dashboard.



This brings you to the **Reports** area where you can export, favorite, and review reports.

How to Favorite Reports

You can star, or favorite, the reports that specifically meet your reporting needs. These reports appear at the top in the **Favorites** area. Just click the **star** icon beside the report title that you want to favorite.



How to Export Reports

Do you need to have a copy of your reports on hand for an important meeting? Would you like to compile your reports in a spreadsheet for a presentation? You can always export them when you need them.

1. Go to **Reports.**
2. Click the report title that you need to export.
3. Filter the reports as needed.

Watch this video on how to export Opportunity reports.

Watch this video on how to export User reports.

Watch this video on how to export Activity reports.

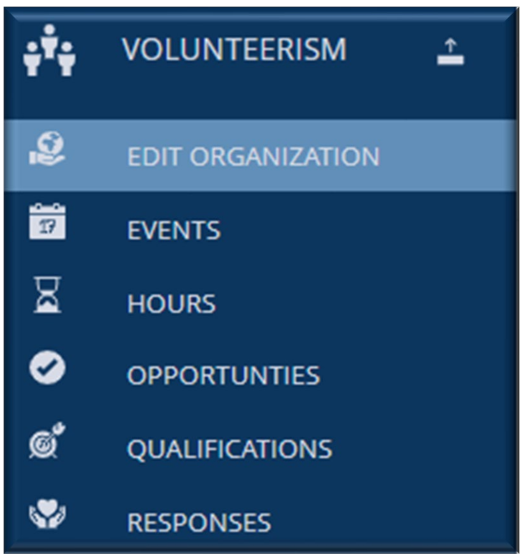
EDIT YOUR ORGANIZATION PROFILE

You can edit and customize your profile whenever you need to.

Your profile includes: organization's name, location information, logo, photos, descriptions and more!

How to Edit your Organization Profile

Go to **Volunteerism** > **Edit Organization** from your dashboard.



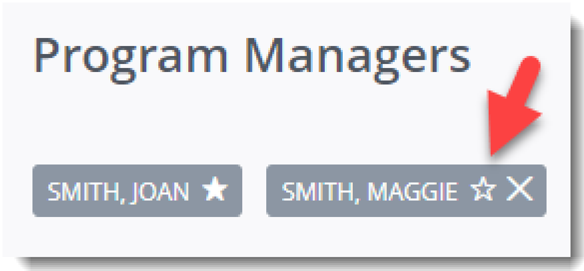
From here you can:

- Change the primary program manager
- Remove program facilitators
- Update logo
- Update program information
- Add photos

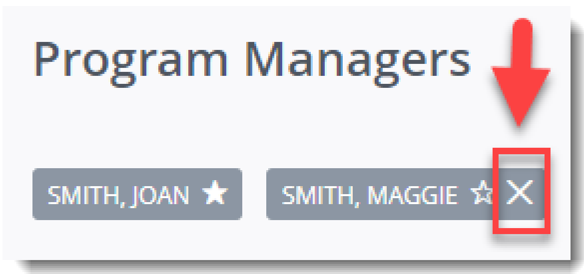
How to Change the Primary Program Manager

You can always change who the primary manager is from the **Edit Organization** area of your dashboard.

1. Go to **Volunteerism > Edit Organization.**
2. If there are multiple Program Managers assigned to the organization, click the star beside the name of the individual you want to make the new primary manager.



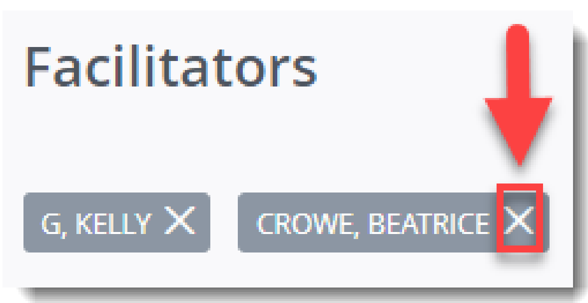
You can also delete a Program Manager by clicking the **X** beside their name. Once a Program Manager is deleted, they can only be re-assigned by OregonServes.



How to Remove Program Facilitators

The steps to remove Program Facilitators are the same as removing a Program Manager.

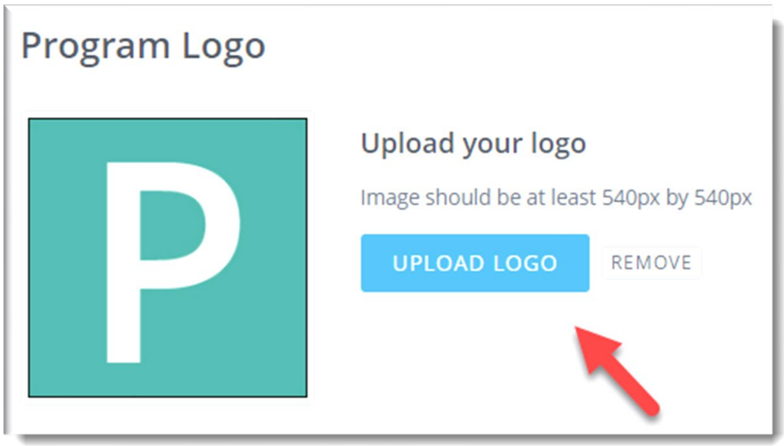
1. Go to **Volunteerism > Edit Organization.**
2. Click the **X** beside the name of the program facilitator you want to remove from your Program. They can only be re-assigned to your organization by OregonServes.



Add or Update Program Logo

To update your Organizations' logo:

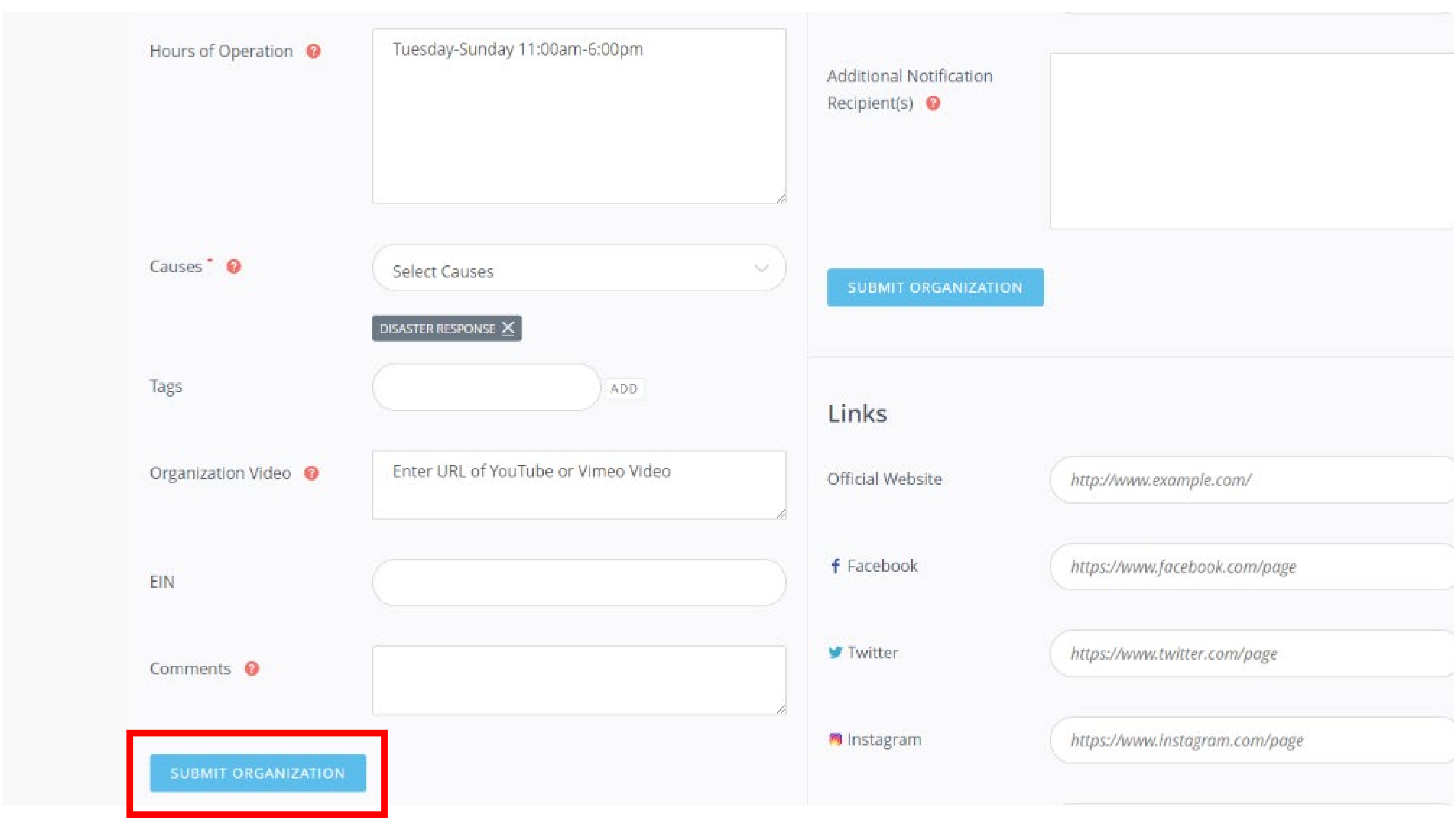
1. Go to **Volunteerism > Edit Organization**.
2. Have your logo ready to upload with the image at least 540px by 540px in size.
3. Click **Upload Logo**, select your image, and either double-click the file or click **Open.**



Add or Update Organization Information

Did your Organization's location change? Do you need to update your Organization's name, unique URL, the causes associated to it, etc.? You can edit and update the Program you manage at any time right from the **Edit Organization** area of your dashboard!

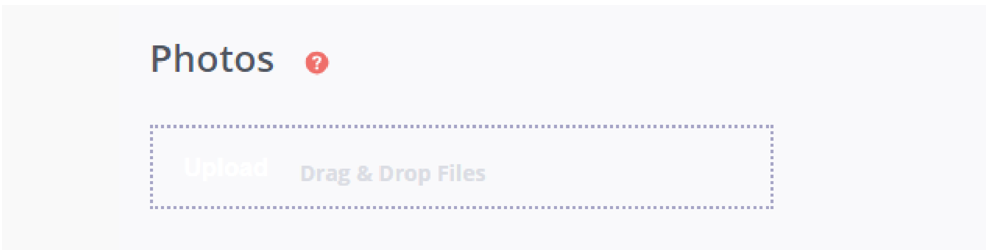
1. Go to **Volunteerism > Edit Organization.**
2. Update any of the information in the available fields that you need to update.
3. Be sure to always click **Submit Organization** to save your changes.



Add Photos

Do you want to highlight your Organization's mission in stories or share images from one of your awesome volunteer opportunities? You can personalize your Organization with images by uploading them to your **Edit Organization** area.

1. Go to **Volunteerism > Edit Organization.**
2. Scroll to the bottom of the page until you see **Photos.**
3. Drag and drop photos.
4. Click **Refresh Now.**

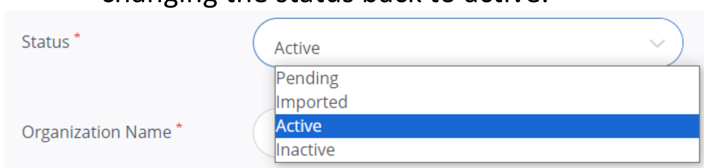
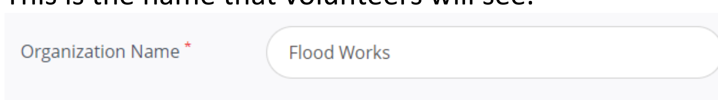
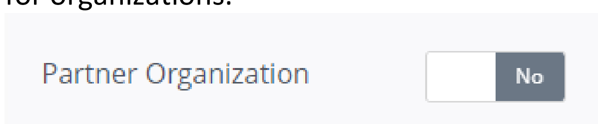
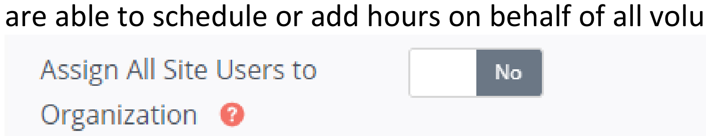
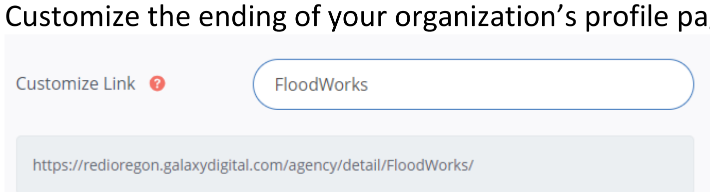
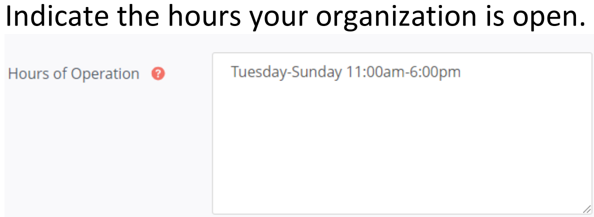


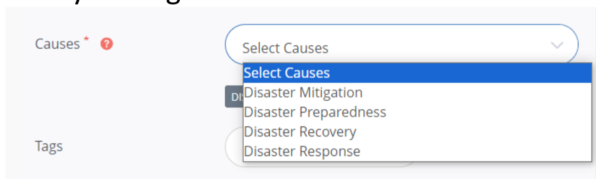
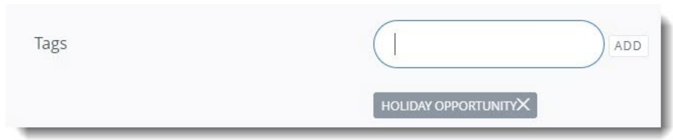
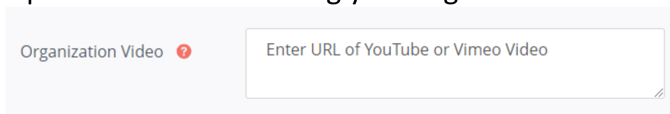
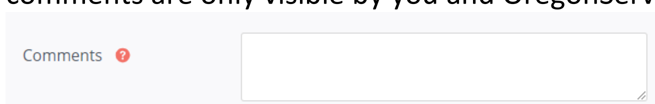
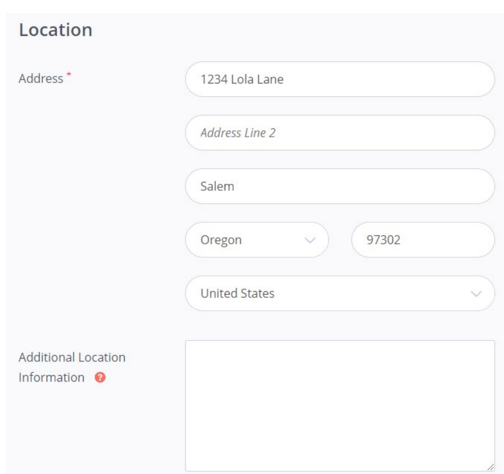
You can also personalize your Organization's profile page with images in the **Descriptions** field.

Tip: if your changes are not showing up after you save them, you may need to refresh your browser.

Here are the different selections you see on the **Edit Organization** form and what they do.

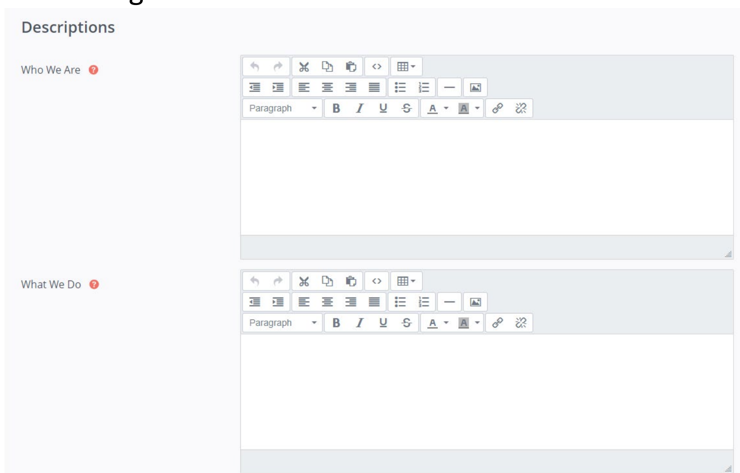
Section	Description
Status	You have three status options to choose from in the dropdown menu.

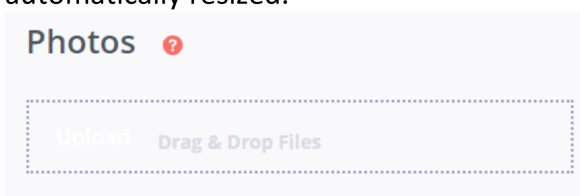
	• Active means you're ready to post and share your volunteer opportunity publicly on your site. Volunteers will be able to see your opportunities and respond to them when they access your site. • Pending means you're not quite ready to post and share just yet. You can start creating an opportunity and select Pending if you want to keep it private until you're ready to post it to your site. • If an opportunity has passed or you no longer want to have it on your site, you can set it to inactive. When an opportunity is made inactive, it no longer appears on your site for volunteers. Volunteers also can't submit hours to that opportunity once it's made inactive. You can reactivate an opportunity at any time by changing the status back to active. 
Organization Name	This is the name that volunteers will see. 
Partner Organization	Toggling this to Yes means that your organization is in partnership with OregonServes. Volunteers will be able to filter by this when searching for organizations. 
Assign All Volunteers to Organization	Toggling this to Yes means that Program Managers for this organization are able to schedule or add hours on behalf of all volunteers on the site. 
Customize Link	Customize the ending of your organization's profile page URL. 
Hours of Operation	Indicate the hours your organization is open. 

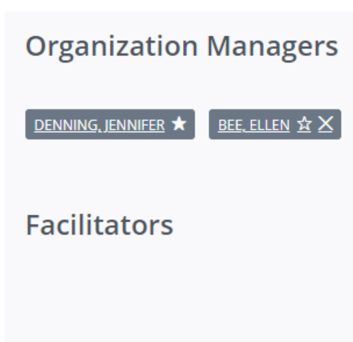
Causes	The causes you assign here help your volunteers search for and match with your organization. 
Tags	Tags are a great way to share your opportunities with volunteers and make it easier for volunteers to search for your opportunities by specific criteria or interests. 
Organization Video	Upload a video describing your organizations mission and vision. 
EIN	Employer Identification Number (EIN) is a Federal nine-digit tax ID number that the IRS assigns to nonprofits, charities, organizations, and businesses. This shows you are a registered business.
Comments	Comments are hidden from the public and other users. These comments are only visible by you and OregonServes 
Location	Use the additional location information box for instructions on where to park, landmarks nearby, etc. 
Descriptions	The description area for your opportunities is important because it's where you can:

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

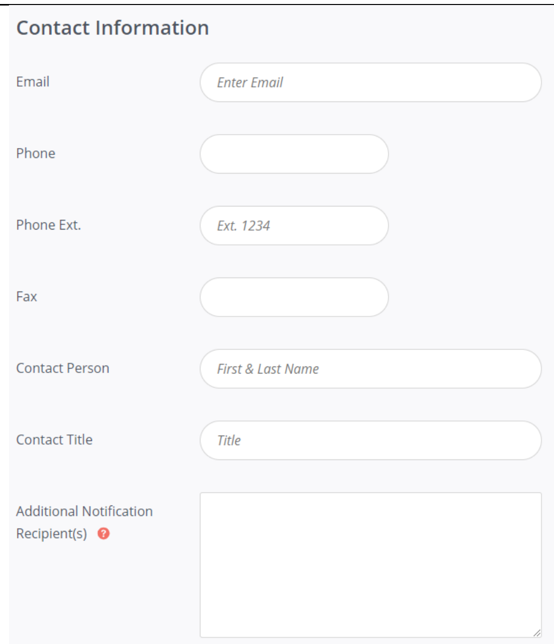
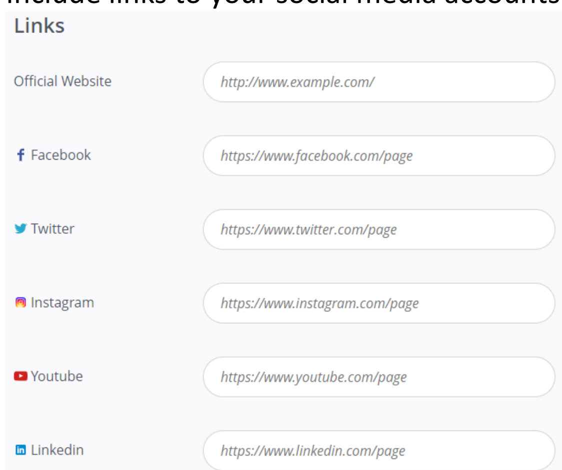
Share your program or organization's goals, history, impact, mission, purpose, and any additional information you want your volunteers to know about for that opportunity.
Include attachments, links, and videos to really showcase your organization.



</td>
</tr>
<tr>
<td>Photos</td>
<td>Personalize your Organization uploading images. Types accepted: JPEG, PNG, .GIF. These are shown publicly on your profile page and will be automatically resized.


</td>
</tr>
<tr>
<td>Organization Managers</td>
<td>Change the primary manager or remove managers or facilitators. The primary manager is indicated with a star next to the name.


</td>
</tr>
<tr>
<td>Contact Information</td>
<td>Additional recipients can be added if would like others to be notified when an opportunity has a response. Emails must be entered on individual lines.</td>
</tr>
</table>

<table>
<tr>
<td></td>
<td>
</td>
</tr>
<tr>
<td>Links</td>
<td>Include links to your social media accounts and website.

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

Remember to click the Submit Organization button to save your changes!

INITIATIVES

An Initiative is a tool for grouping needs that fall under a certain umbrella.

What is an Initiative

Initiatives are a great tool to use when there is a large disaster covering multiple areas of the state and several organizations are responding and have different needs.

Initiatives are useful for the following types of needs:

- When opportunities are associated with a specific event.
- When opportunities are associated with a particular time of year.
- When opportunities are associated with a particular group of volunteers.
- When opportunities are associated with a particular effort.

Initiatives are not associated with specific dates and do not have a start and end date. However, the needs within an initiative can be associated with dates.

How it Works

Only OregonServes can create an initiative, but Organizations can create and add needs to any Initiative.

Still in development.

MANAGING VOLUNTEERS

Your volunteers are called Users and can be found in the Users module.

Your Users include anyone who has:

- Interacted with one of your opportunities or events.
- Has been assigned to your organization.
- Is a member of a user group assigned to your organization.

Viewing and Filtering Volunteers

The software allows organizations to filter volunteers based on certain criteria. With this feature, organizations can:

- Add or remove volunteers from a user group.
- Export the filtered list of volunteers that:
  - Live in the same zip code.
  - Have similar availabilities.
  - Have the qualifications required for specific opportunities.
- Quickly send several volunteers a reset password link.
- Schedule volunteers with shared qualifications.

1. Go to **Volunteerism > Users.**
2. Click **User Filter.**
3. Select the dropdowns to choose your filter.
4. Click **Submit.**

Add New Volunteers

Program Managers can add new volunteers to the site if they have not already created an account.

1. Go to **Volunteerism > Users.**
2. Click **Add New User.**
3. Type in the volunteers' **Name** and **Email**
4. Check the **Send the "Invitation to Complete Your Profile" email** box.
5. Click **Add New User and Finish.**

Hours Tracking and Management

Approve or Deny Volunteer Hours

The software is designed to require the review and approval of hours submitted by volunteers. Program managers can approve hours in bulk or one-at-a time. Watch the video tutorial below to learn how to approve and deny hours.

1. Go to **Volunteerism > Hours.**
2. Find the volunteer and check the box next to their name.
3. In the drop-down choose the appropriate choice for those hours.

You can also approve or deny more than one volunteer's hours at a time.

1. Check the box next to their names.
2. Click **Decline Hours** or **Approve Hours** at the top of the screen.

Add Hours on Behalf of a Volunteer

If a volunteer needs assistance recording their hours, Program Managers can submit hours on their behalf. Watch the tutorial below to learn how to add hours for a volunteer.

1. Go to **Volunteerism > Hours.**
2. Click **Add an Hour Entry.**
3. Type in the User's name.
4. Type in the Opportunity name.
5. Complete the **Hour Details** form.
6. Click **Submit Hour Entry.**

Scheduling Volunteers

Program Managers can schedule volunteers for certain shifts. Individual volunteers can be scheduled or they can be scheduled in bulk. If you need volunteers with certain qualifications or skills, you can filter and schedule those specific volunteers. Once you've selected your volunteers, you can send them an email message.

Emailing Volunteers

How to Send an Email Blast

Want to send several or all of your volunteers an email? You can with an Email Blast.

1. Go to **Communication** > **Email Blast.**
2. Use the **User Filter** to select who you want to send the email blast to-it automatically includes all of the volunteers in your Organization.
3. Add a **Campaign Name.**
4. Select **no-reply@galaxydigital.com** as the **From** email address
5. You can update the **From Name** as needed.
6. Add a **Subject.**
7. Use the editor to customize your message with color, images, links and more.
8. Insert the necessary template keys.

9. Click **Send Email Blast.**

How to Send an Individual Volunteer an Email

The Email Blast tool is great for sending several volunteers an email or notification in one, but you might want to contact a volunteer individually. There are a few different ways to email the volunteers in your program, but we cover the most direct route here!

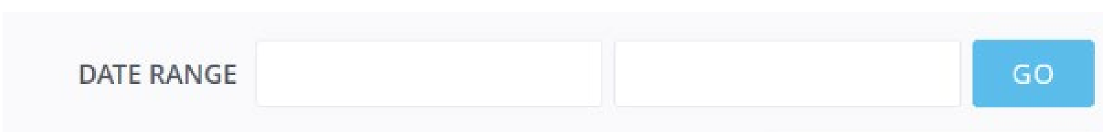
1. Go to **Volunteerism** > **Users.**
2. Search for the volunteer you want to email.
3. Click their **Email.**
4. Fill out all necessary fields and click **Send Email.**

You can follow this method for emailing volunteers in other areas of the site that include the **Email** column in their tables—e.g., the **Hours** and **Responses** tables include an **Email** column that you can click and email the volunteers directly.

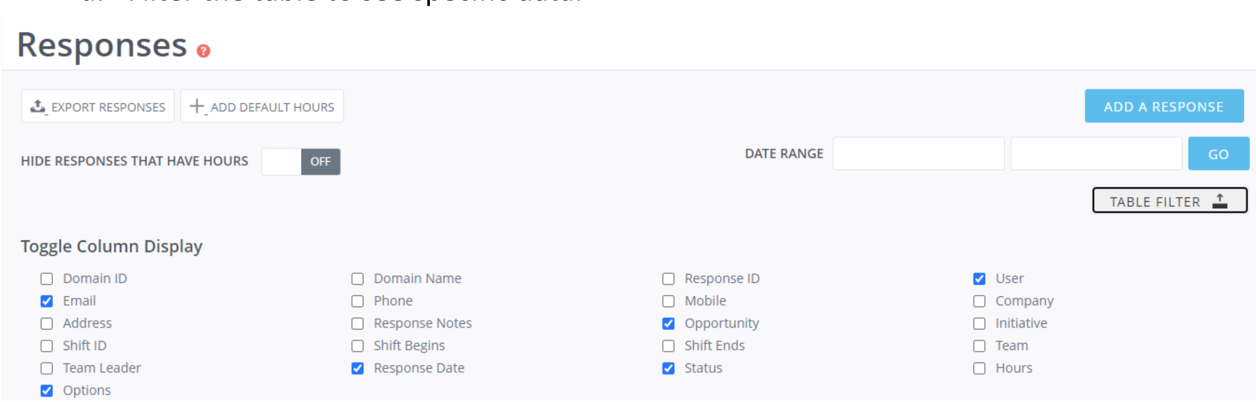
View Volunteer Responses

In addition to reviewing hours and checking volunteers in and out for opportunities, you can also view volunteer responses. This is great for knowing who's responded to what opportunities and which opportunities are getting the most engagement.

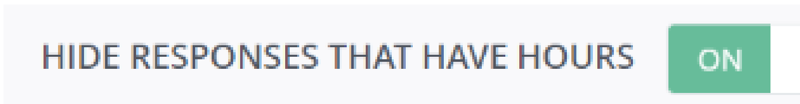
1. Go to **Volunteerism** > **Responses.**
2. From here you can:
    a. See who responded to an opportunity, their contact information, what opportunity they responded to, and their status.
    b. Export the responses to a CSV file.
    c. Search responses by a specific date range.



    d. Filter the table to see specific data.



e. Hide the responses that have hours.



f. Navigate to the volunteer’s profile.
g. Navigate to the opportunity’s page.

MOBILE APP - CAUSER

Volunteers can access their profile for free on any device via the Causer App.

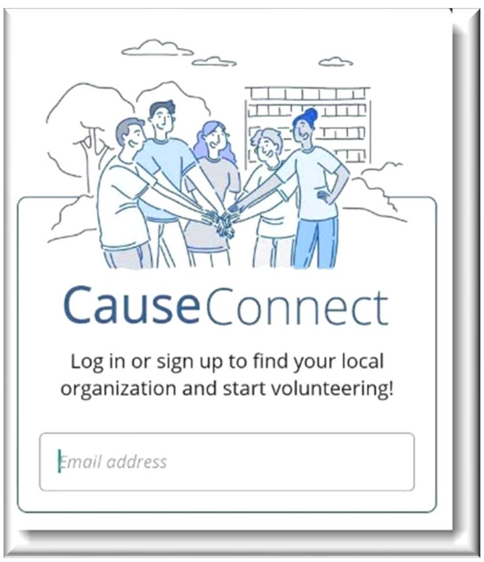
Through the app, volunteers can:

- Search and sign up for opportunities.
- Track their hours.
- Check into their shifts.
- View their calendar.
- View reminders and notifications.

How to Access the App

Volunteers can access the app by following the three steps below.

1. Download the Causer app from the app store or scan the QR code for iPhone or Android.



   If a volunteer has already registered on the site, they will use the email address used to sign up to log into the app.

2. A list of possible sites will appear for the volunteer to choose from.

   Choose: Oregon Volunteers in Disaster.

3. Enter password.

   After logging in, they will be taken to their volunteer dashboard and can view their impact or search for volunteer opportunities.

QUALIFICATIONS

Qualifications prevent volunteers from responding to an opportunity unless they meet the required qualifications.

You may want to require opportunities to have qualifications assigned to them. Qualifications are used to help place qualified volunteers in the right opportunities. With qualifications, you can filter volunteers with similar skills and answers to qualification questions when scheduling them for opportunities. Qualifications can also be used to have volunteers sign important documents or waivers before they arrive to volunteer.

How it Works

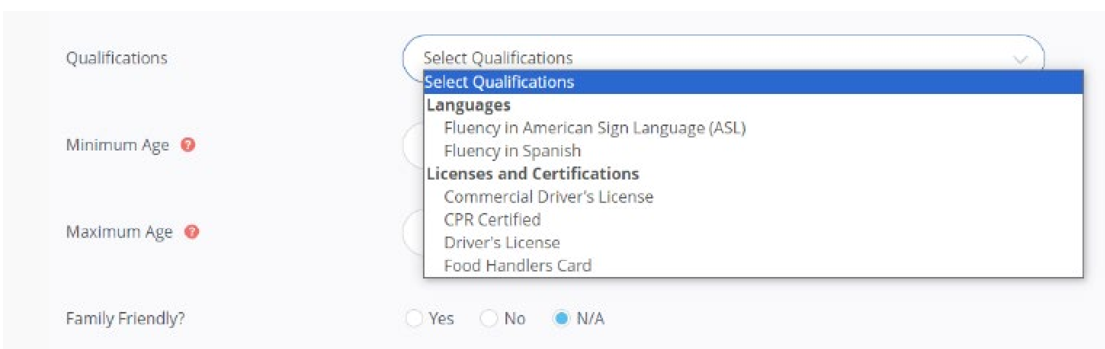
Qualifications are established by OregonServes and an organization must assign Qualifications to its posted opportunities. When a volunteer responds to an opportunity with a Qualification, they either answer the questions or upload a file. Depending on the type of qualification, Program Managers may need to review submitted qualifications and approve or deny them.

If your organization needs a certain qualification created, please complete this form.

Current Qualifications

The software includes the following qualifications:

- Commercial Driver's License-file upload.
- Driver's License-file upload.
- CPR Certified-file upload.
- Fluency in American Sign Language-yes, no.
- Food Handler's Card, file upload.
- Fluency in Spanish-yes, no.

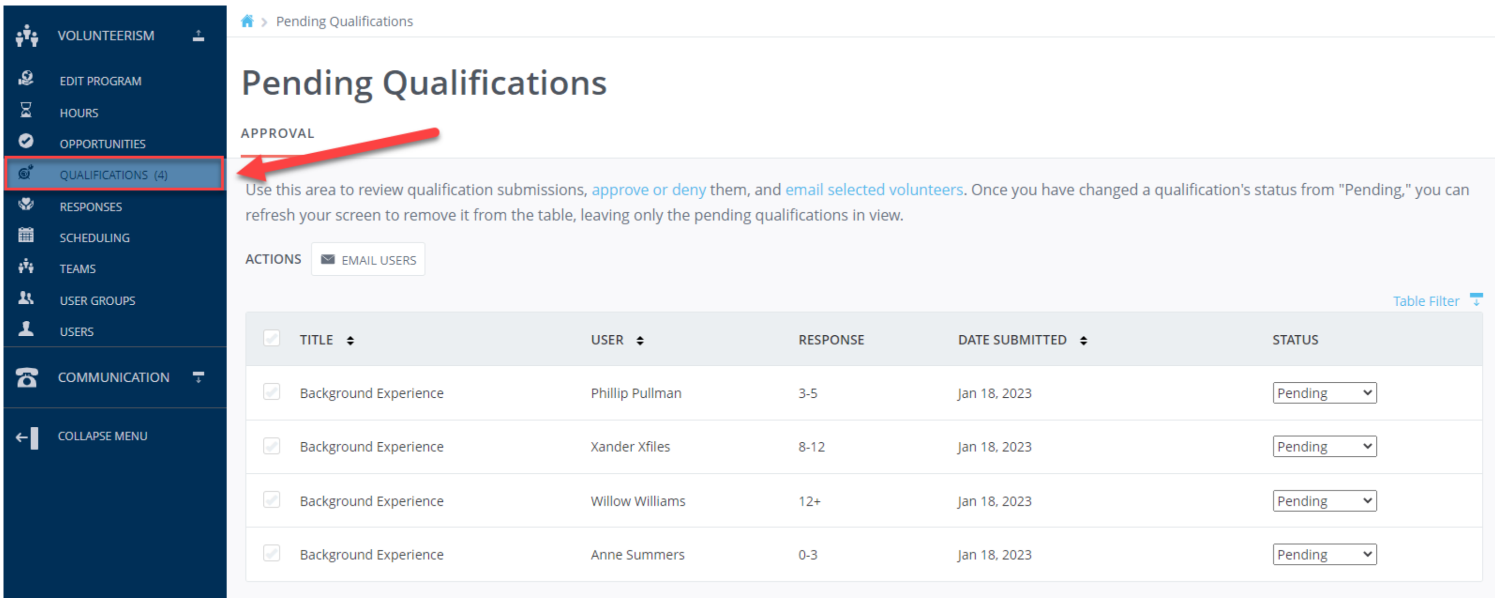


How to Assign a Qualification to an Opportunity

1. Go to **Volunteerism > Opportunities.**
2. Click **Add New Opportunity** or select an existing Opportunity.
3. Scroll down to Qualifications and select the type of Qualification in the drop-down menu.
4. Click **Update Opportunity**.

How to Review and Approve Qualifications

1. Go to **Volunteerism > Qualifications.**



2. To update a Qualification's status, click the drop-down under the **Status** column.
3. Select the appropriate **Status** and the selection will automatically save.

Here are the different Qualification selections and what they mean.

STATUS	DESCRIPTION
Qualified	The volunteer has satisfied the qualification requirement and can participate in the Opportunity they've responded to.
Pending	The volunteer's qualification is awaiting review and approval from you.
Not Qualified	The volunteer hasn't satisfied the qualification requirement and can't respond or participate in the opportunity until they're qualified.
Inactive	The qualification is no longer active.

Resubmit	Select this status when a volunteer answers a qualification incorrectly or needs to resubmit their qualification for re-consideration. The user is notified when you choose this status.

Email Volunteers About Their Qualifications

You can email volunteers to notify them of their qualification status or to find out more about their answer to a qualification question. To email volunteers:

1. Go to **Volunteerism > Qualifications.**
2. Click the box next to the **Users** you want to email.
3. Click **Email Users.**
4. Enter the Campaign Name (i.e. Qualifications).
5. Select the **From** email address: no-replly@galaxydigital.com**.**
6. Enter the **From Name:** your organization name.
7. Type your message in the **Message** box.
8. Click **Send Email Blast.**

USER GROUPS

User Groups are created to help group individuals together for quick filtering, reporting, and scheduling.

Note: User Groups are different from Teams. Teams allow volunteers to manage themselves and are a way for coworkers, family, or friends to volunteer as a group.

What are User Groups

A user group helps you quickly identify users on your site that have shared interests or skillsets. A user group is a tool for grouping volunteers under a single "umbrella" so that volunteers and organizations can:

- Measure engagement for multiple people who are volunteering on behalf of their larger group.
- Engage in community initiatives as a group.

When is a User Group Created?

You would want to create a user group when:

- You want to share specific or private Opportunities with only specific volunteers.
    - Just know that you always have the option to share private Opportunities with specific volunteers, but this is one tool that can help keep things organized!
- You want to quickly assign specific Opportunities to a group of qualified users.
- You want to quickly filter users by shared interests, causes, skillsets, etc.
- You need to report on a specific group of volunteers.
- You want to quickly send an email blast to a select group of volunteers.
- When you want users in a user group to track their engagement and hours with their user group resume.

Example: Cooling Shelter
You have a group of volunteers that have been trained and have the necessary qualifications needed for the type of opportunity.

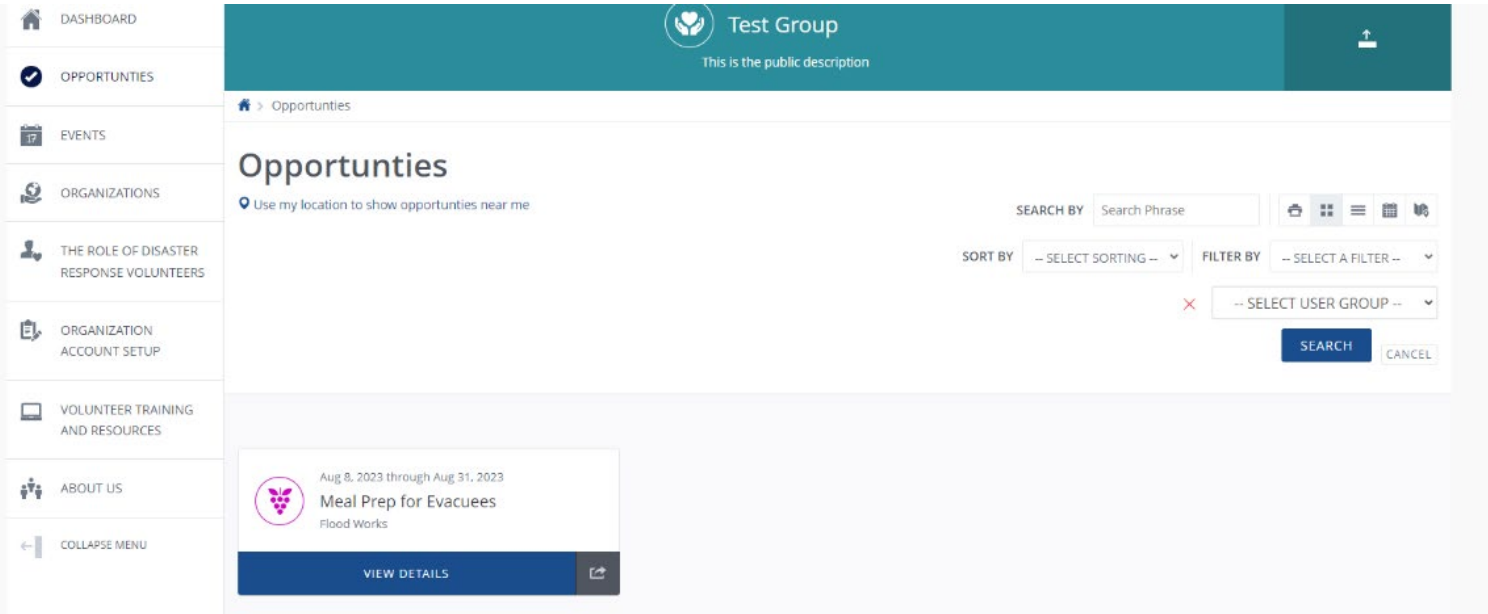
How it Works

Only OregonServes can create new User Groups and assign them to Organizations. Complete this form to request a User Group.

Once the User Group is created, Organizations can:
- See all User Groups assigned to your Organization.

- Review basic information about the User Group.
- Copy the join or resume links.
- Add volunteers to the User Group.
- Assign Opportunities to the User Group.

This is what a User Group looks like from the volunteer perspective.



Managing your User Groups

How to Assign an Opportunity to a User Group

[Watch this video to learn how to assign an Opportunity to a User Group.]

How to Add a Volunteer to a User Group

1. Go to **Volunteerism** > **User Groups.**
2. Select the User Group you want to add to.
3. Under User Group Members, type the Volunteer's email in the **Member Email** field.
4. Click **Add New Member.**
   a. See who responded to an opportunity, their contact information, what opportunity they responded to, and their status.
   b. Export the responses to a CSV file.
   c. Search responses by a specific date range.

VOLUNTEER BACKGROUND CHECKS

Vet your volunteers through integrated background checks.

Sterling Volunteers offers volunteer screening services to nonprofits and volunteer programs all across the country. They are the only screening provider that allows volunteers to own and share their background check with multiple nonprofits in a safe, tamper-free environment. This results in significant savings for organizations, their volunteers, and the communities they serve.

Sterling Volunteers provides a secure online volunteer screening platform for the volunteer to enter and control their information when ordering a background check. If desired, once a volunteer is verified, he or she has the option to use their background check to apply for volunteer positions with other volunteer organizations both within and outside of the Sterling Volunteers community. It's the fastest, easiest, and most affordable way to connect volunteers with the causes that inspire them most.

How it Works

Currently in development.

VOLUNTEER PERSPECTIVE

Volunteers create their profile and search and sign up for opportunities.

How it Works

Volunteers create an account by completing a 5-step sign-up process. Here are the steps and the questions that are asked. Questions with an * indicate that they are required to be answered.

Step 1: Standard Questions

- Phone
- Mobile*
- Address*
- County*
- Distance Willing to Travel
- Date of Birth*
- Age Range
- Expected Graduation Date
- Company
- Job Title
- Department
- Role
- Contact me in the event of a disaster*
- Emergency Contact*
- Availability*
- Favorite Organization

Step 2: Custom Questions

- Ethnicity*
- How did you hear about us?
- Please indicate if you speak another language other than English
- Gender*

Step 3: Select Interests

Volunteers can select from the following interests which help the site recommend opportunities with those interests.

- Physical labor
- Animal evacuation/care
- Bilingual translation
- Call center support

- Disaster clean up
- Disaster mitigation
- Donation/supply management
- Food service/feeding operations
- Mass shelter operations
- Medical transportation
- Mental health support
- Paperwork navigation
- Search and rescue
- Site traffic management
- Technology setup
- Volunteer management

Step 4: Select Causes
Volunteers can select from the following causes which helps the site recommend organizations with those causes.

- Disaster mitigation
- Disaster preparedness
- Disaster recovery
- Disaster response

Step 5: Disaster Profile
Emergency contact name*

- Emergency contact phone*
- Blood type*
- Do you want to be notified by text as needed in a disaster*
- Have you attended disaster training with any organizations
- Skills and services (this cannot be required)
    - Equipment and Resources: Backhoe
    - Equipment and Resources: Boat
    - Equipment and Resources: CB/2-way radio
    - Equipment and Resources: Chainsaw
    - Equipment and Resources: Commercial Driver's License
    - Equipment and Resources: Commercial vehicle
    - Equipment and Resources: Four-wheel drive vehicle
    - Equipment and Resources: Ham radio
    - Equipment and Resources: Pickup truck
    - Equipment and Resources: Portable generator or solar power
    - Equipment and Resources: Trailer
    - Equipment and Resources: Water pump
    - Equipment and Resources: Animal care
    - Experience: Animal care
    - Experience: Chainsaw operation

- Experience: Childcare
- Experience: Clean-up
- Experience: Clerical/data entry
- Experience: Construction
- Experience: Elderly/functional needs care
- Experience: Food prep
- Experience: Mucking and gutting
- Experience: Phone work
- Experience: Roofing
- Experience: Spiritual care
- Experience: Telephone receptionist
- Experience: Warehouse/sorting/loading
- Experience: Web design
- Medical: Counseling
- Medical: Dentist
- Medical: EMT/paramedic
- Medical: First/aid CPR
- Medical: Mental/behavioral health
- Medical: Nurse
- Medical: Other medical
- Medical: Pharmacist
- Medical: Physician/PA
- Medical: Veterinarian
- Specialty: Accounting
- Specialty: Auto repair/towing
- Specialty: Carpentry
- Specialty: CERT
- Specialty: Clergy
- Specialty: Cook
- Specialty: Damage assessment
- Specialty: DART
- Specialty: Electrical
- Specialty: Ham radio operation
- Specialty: Heavy equipment operator
- Specialty: Mountain climbing/rappelling
- Specialty: MRC
- Specialty: Pilot
- Specialty: Plumbing
- Specialty: Red Cross volunteer
- Specialty: Shelter management
- Specialty: Specialized search and rescue
- Specialty: Trucking/hauling
- Specialty: VIPs
- Specialty: Volunteer management

- Specialty: Welding

WAIVERS

Organizations can require waivers for volunteer opportunities.

Waiver Types

There are two types of Waivers:

1. **eSignature Qualification Waiver**
   As part of the Qualifications feature, a waiver qualification can be set up that includes an eSignature.

   Unique Features: Waiver qualifications are the waivers that can be signed electronically. OregonServes can upload both an adult and a minor version of a waiver.

   Application: Waiver qualifications can be applied either site-wide (where the waiver must be signed in order to view any need), or they can be applied to one or more needs (where the waiver must be signed in order to respond).

   Volunteer Access: Volunteers can access waiver qualifications in the My Qualifications section of their profile. If a waiver qualification is applied to a need, volunteers can access it from the need posting as well by clicking the Sign Waiver button that appears in place of the usual Respond button.

   Volunteer Experience: While some qualifications are optional, a waiver qualification is required if it has been added to a need. A volunteer will not be able to complete their need response until the full, signed waiver is submitted. If a "minor" version is used, a copy of the waiver is sent to the minor volunteer's parent or guardian, and that person must sign before the minor can complete the need response.

   File Format Allowed: PDF

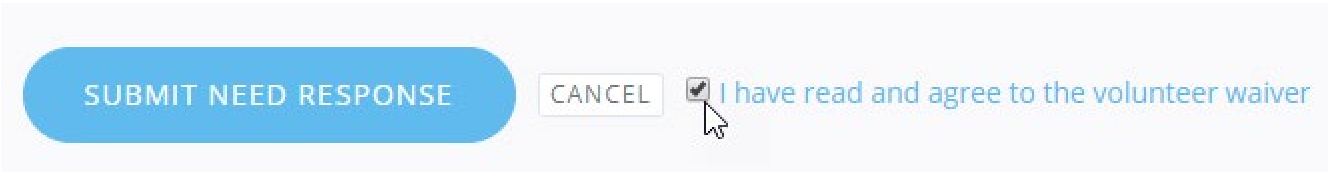
2. **"Clickwrap" Waivers for Standard Needs**
   With a "clickwrap" waiver, the volunteer checks a box indicating that they agree to the waiver conditions. Volunteers cannot sign this kind of waiver electronically, but they can click a link to view it before agreeing to it.

   Unique Features: An Organization can upload their own waiver and attach it to the need.

   Application: These waivers are specific to the volunteer opportunity. They cannot be applied site-wide.

Volunteer Access: This waiver appears at the bottom of the need-response form.

Volunteer Experience: If a waiver has been added to a need posting, it will be required for any volunteer who wishes to respond to the need.



File Formats Allowed: Word documents (.doc, .docx) and PDF

How to Set Up an eSignature Waiver

Since this is a type of Qualification, OregonServes has to set up the Waiver. Please see the Qualifications section for how to request a Waiver Qualification.

How to Set Up a Clickwrap Waiver

1. Go to **Volunteerism > Opportunities.**
2. Click **Add New Opportunity** or choose an existing opportunity.
3. Scroll down to **Waiver** and click **Choose File.**
4. Select the correct file.
5. Click **Create Opportunity** or **Update Opportunity.**

FAQS

Question: What server is the ORVID software hosted on?
Answer: Amazon Web Services

Question: What does it mean when a volunteer becomes a "Fan" of my organization?
Answer: This means that the volunteer will receive regular updates on your organization related to the latest opportunities and events you post.

Question: Why is my volunteer opportunity not listed in the kiosk?
Answer: The opportunity has expired.

- If the opportunity's expiration date or shift date has passed it won't appear in the kiosk.
- Volunteers can still log hours on their profiles.

The opportunity is scheduled for next week.

- An opportunity or shift must be scheduled for within the next seven days to appear in the kiosk.

The opportunity doesn't have hours associated with it.

- When creating an opportunity, the Hours field is required. However, if '0' is entered in that field then the opportunity won't appear in the kiosk.

The opportunity is full.

- When an opportunity has met its capacity, it won't appear in the kiosk.
- Volunteers that signed up for the opportunity can still check in to it.

The opportunity is set to private.

- A private opportunity won't appear in the kiosk unless it's assigned to a user group.
- User Group members can sign up for the private opportunity in the kiosk.

The volunteer didn't respond to the opportunity.

- If the volunteer hasn't already responded to the opportunity before logging into the Check-In Kiosk, then it won't appear on the main page.
- They can click View Other Opportunities to see those opportunities and respond to them.

Question: What is ORVID's privacy policy?
Answer: Click this link to view the privacy policy: https://www.galaxydigital.com/privacy-policy/

Question: How do I reset my password?
Answer: Click here to access the link to reset your password: https://redioregon.galaxydigital.com/user/passwordRecover/

Question: What is the difference between an Opportunity and an Event?
Answer: An Opportunity is a volunteer opportunity posted by an organization's Program Manager. An Opportunity is where volunteers sign up to serve in their community, record and report their hours, and receive recognition for volunteering.

An Event is a public occasion sponsored or promoted by an organization, and to which the community is invited to attend. Events can include the option for people to RSVP. Events are things like volunteer trainings, webinars, fundraisers, etc.

Question: What is the difference between a Team and a User Group?
Answer: A Team is a chance for volunteers to create and manage their own group. They can build their own team when responding to Opportunities that have team signup enabled. Teams can be made for coworkers, families, or friends that wish to volunteer together.

A User Group helps you quickly identify users on your site that have shared interests or skillsets. You can assign a user group leader, but you or your advanced program managers are still the ones managing the user groups. It's also a great tool for filtering and reporting on users within those groups.

GLOSSARY

Badge
A graphic indicator that a volunteer has reached an established benchmark for volunteer hours.

Benchmarks
A set number of volunteer hours that must be achieved within a certain time frame.

Causes
Designation applied to an organization and used to match organizations up with volunteers who express an interest in one or more of its causes.

Dashboard
The "landing page" for a logged-in user.

Events
A public occasion sponsored or promoted by an organization, and to which the community is invited to attend. Events can include the option for people to RSVP. Events are things like volunteer trainings, webinars, fundraisers, etc.

Hours
Volunteer hours. Volunteers can submit their own hours, or they can be submitted on behalf of a volunteer by a Program Manager.

Interests
Designation applied to opportunities and used to match opportunities with volunteers who express an interest in one or more of those interests.

Opportunity
A volunteer opportunity posted by an organization's Program Manager. An Opportunity is where volunteers sign up to serve in their community, record and report their hours, and receive recognition for volunteering.

Organization
An entity, agency, group, etc. that creates an ORVID account to post volunteer opportunities and manage their volunteers.

Plus-One Hours
Volunteers can submit hours for friends or family who volunteered with them but do not have their own ORVID account.

Program Manager
A Program Manager has full control over their organization's profile and is able to edit the profile, post needs and events, and approve volunteer hours submitted.

Program Facilitator
A Program Facilitator helps oversee an organization's programs and opportunities and has viewing capabilities.

Qualifications
A feature that prevents volunteers from viewing or responding to a need unless they have met the required qualifications for that need. Qualifications are established by OregonServes, and an Organization must be approved to attach qualifications to its posted needs.

Response
Registration for an opportunity. A volunteer responds to an opportunity by clicking the **Respond** (or **Respond as Team**) button. Following an opportunity response, automated notifications are sent to both the volunteer and the Program Managers of the Organization that posted the opportunity.

Schedule
A calendar view showing scheduled volunteer opportunities for a volunteer, organization, or site.

Team
A group of volunteers who are part of a single opportunity response. A team response is initiated by a team creator. The team creator can reserve slots for team members, can add the team members using their email address, or can send out a team join link to volunteers so that they can join the team. A team cannot be created independently of an opportunity response.

Users
Designation for individuals who have ORVID accounts and can access only the public side of the platform. (In other words, users cannot access the site manager panel.) Users include both volunteers and Program Managers.

User Groups
A user group is a tool for grouping volunteers under a single "umbrella" so that volunteers and organizations can (1) measure engagement for multiple people who are volunteering on behalf of their larger group, and (2) engage in community initiatives as a group.