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User Levels

There are four user levels within VolunteerMatch.

The basic account is a volunteer account, where they can track their own hours, sign up for projects, propose projects for approval, manage their profile and set up opportunity alerts.

**Project Leaders** manage individual projects. You may choose one of two levels of Project Leader roles – project admin or project leader.

<table>
<thead>
<tr>
<th>Action</th>
<th>Leader</th>
<th>Admin</th>
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<tbody>
<tr>
<td>Add Participants</td>
<td>✔</td>
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<tr>
<td>Edit Status</td>
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<tr>
<td>Send Emails</td>
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<tr>
<td>Run Reports</td>
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<td>Manage Waitlist</td>
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<td>✔</td>
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<tr>
<td>Track Hours</td>
<td>✔</td>
<td></td>
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<tr>
<td>Edit the Project</td>
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</tbody>
</table>

**Special Event Administrators** are added to individual campaigns. Under that Special Event Campaign (e.g. “Alumni Association” or “College of Engineering”) an SEM admin can post and manage projects, manage participants, track hours for participants and run signup reports for their campaign. Any Full Site Administrator or SEM admin can add a new SEM admin to a campaign.

The highest admin level is the **Full Site Administrator**, who can manage events, create new campaigns, run reports, feature nonprofits, customize the homepage and send system-wide emails. The Office of Volunteer Relations serves as the Full Site Admin.
Volunteer Experience: Logging into Your Account

To create or log into your account, select “login” in the upper right-hand corner of your site. If you have an account, use your id and password to log in.

You may search for opportunities without logging in. If you find an opportunity you would like to volunteer for you will be prompted to sign in when you click the “sign up” button. All logins are managed through the Ohio State University Alumni Association’s website. YOU DO NOT NEED TO BE AN ALUMNUS TO SIGN IN! If it is your first time logging in you will be prompted to search the system to see if you have an existing account with the university. If one is not found, you can create one immediately. After logging in you will be returned to the Ohio State VolunteerMatch website.

Volunteer Experience: Tour of Your Homepage

Welcome to your volunteering homepage. This is where you’ll find all the tools you need to get involved with the volunteering program at Ohio State.

Your Activities Tab

The Your Activities tab will display information based on your activity on the site. This tab contains a section of Action Item buttons, a Personal Hours Tracking Gauge, and a Your Volunteering Table.

Track Hours Button

This button is a quick way for you to track hours. When you select the button, you will see a pop up where you can select either an existing activity that you have either signed up or tracked hours for or enter a brand new activity that is not in the system.
Select Existing Activity
When you select an existing activity and click continue, you are presented with a second modal that allows you to enter a date, total number of hours volunteered, and answer any necessary hour tracking questions.

Add New Activity
When you select **ADD NEW ACTIVITY**, you will be directed to search for an Ohio State department. Enter the department name and location. If you find the department you worked with, select the organization by clicking “Track Hours”. Then, enter the opportunity and volunteering information and click “Save”. Still can’t find the organization? You can still track your hours! Click on the link at the bottom of the search results to manually input the organization’s information and track your hours.

Upon returning to the home page after tracking hours you will see a message in green confirming the hours have been tracked. The Activities Table will also update and display the activity and hours that were entered.

**Suggest Button**
Click on the **SUGGEST** button.
Click on **"Suggest a new Opportunity."**
Give your opportunity a title

Click on the "suggest" button. To suggest a project, click on "Suggest a new Opportunity" Give your opportunity a title.

Fill out the remainder of the form including the location, date, time and description of the activity. You can also add in "comments" that will be visible just to the program administrator as they review your project.

If there are specific skills you require choose them from the drop down menu. You may choose up to 6 necessary skills
Select up to 3 cause areas under which your volunteer opportunity fits. These categories are used as one of many search functions.

Please be as complete as possible when suggesting an opportunity. Though the “Finer Details” are optional they will be important to help volunteers know exactly what you’re looking for.

You can also add in "comments" that will be visible just to the program administrator as they review your project. If your opportunity is at a physical location, indicate the region you would like to advertise to: zip code, city, county, metro area, state, national.

To complete your entry, click “SAVE.” Then click “EDIT” to review your listing. Your proposal will now be reviewed by a program administrator.

Once you’ve proposed a project, you can click on "Suggest" to view the status of your listing. In the ‘Status’ column you’ll see whether your listing has been approved, rejected or is still waiting for approval. If your listing has been rejected, you can click ‘Edit’ to modify your suggestion and resubmit it. You can also edit listings that have not yet been reviewed.

Once approved by a program administrator, volunteers will be able to sign up to participate in your suggested activity.

Once you’ve proposed a project, you can click on "Suggest" to view the status of your listing. In the ‘Status’ column you’ll see whether your listing has been approved, rejected or is still waiting for approval. If your listing has been rejected, you can click ‘Edit’ to modify your suggestion and resubmit it. You can also edit listings that have not yet been reviewed.
Alerts Button

This button will direct you to the alerts page where you can customize an email to be sent to you on a daily, weekly or monthly basis that displays opportunities based on your interests and location.

Search Button

This button will direct you to the search results page displaying available volunteering opportunities for your location. You can select filters to narrow your results.

Personal Hours Tracking Gauge

This gauge will display an hour goal and each time you track hours it will update your progress towards this goal. Clicking “Create” will display a modal that will allow you to edit a title, select a time period and a total number of hours. You can always update this goal by selecting “edit gauge” beneath the thermometer.
Your Volunteering Table

This table is displayed beneath the action item buttons and shows which opportunities you have signed up for, or tracked hours towards. The table displays the activity name, the organization or special event, the dates associated with that activity, and action icons that allow you to quickly take specific actions on that opportunity. There is also an option to add a new activity. When you track or edit hours, a message will display above the table in green confirming the success of the action.

Activity and Organization

You can click on the activity name and the organization name. When clicking on the activity name you will be taken to the opportunity details page. When clicking on the organization name, you will be taken to the department’s landing page. When the activity was entered manually by you, the edit volunteer entered opportunity page will be displayed (see image to the right).
**Action Icons**

For each activity there will be Action Icons on the right side of the table. There are 5 different action icons that will allow you to track hours, add recurring hours, edit an existing hour entry, edit a recurring hour entry, and manage participants. If you hover over the action icons a message will display explaining the action.

- **Track Hours** – will display a modal to track hours for that activity.
- **Add Reoccurring Hours** – will display a modal to add a reoccurring hour’s entry for that activity.
- **Edit Hours** – will show after you have tracked hours for that activity and will display a modal to edit the previously track hours for that activity.
- **Edit Reoccurring Hours** – will show after you have added a reoccurring hour entry and will display a modal to edit the previously reoccurring hour for that activity.
- **Manage Participants** – will show when you are the Project Leader for that activity and will direct the volunteer to the Manage Participant page for that Activity.

**Add New Activity**

Clicking on Add New Activity will direct you to search for an Ohio State department. Enter the organization name and location. If you find the organization you worked with, select the organization by clicking “Track Hours.” Then, enter the opportunity and volunteering information and click “Save.” Still can’t find the organization? You can still track your hours! Click on the link at the bottom of the search results to manually input the organization’s information and track your hours. After selecting an organization or manually adding a new organization and adding the total number of hours volunteered, the date, answering the required questions, you
will be directed back to the home page. Upon returning to the home page after tracking hours you will see a message in green confirming the hours have been tracked. The table will also update and display the activity and hours that were entered.

“Impact Tab”
You will see a tab on your homepage that shows Ohio State’s overall goals and goal progress. There are a number of ways you can interact with this tab:

Site-Wide Goal
The graph at the top of the tab will show a site-wide volunteering goal, tracking real-time status.

Program Activity Graph
This graph displays site activity over time. You can switch between three different views: your personal, Ohio State volunteers in your state and the entire university’s activity.

Popular Causes
Here you’ll see the cause areas with the most sign-ups during the current month. Clicking a cause area displays related opportunities in your area.

Highlighted Volunteering Activities
Below your homepage tabs, you’ll see highlighted volunteering opportunities in your area. These are all local projects in the various university departments. Click on a project title to learn more about a specific opportunity, or select “MORE” to see additional opportunities. You can scroll through additional searches by selecting the arrow buttons.
Volunteer Experience: How Do I Find a Volunteer Opportunity?

When you come to your Volunteering site, enter in your location in the search bar, and select “search.” You’ll see filters on the left-hand side of the page. These filters take some of the most frequently used categories from the Advanced Search and allow you to quickly and easily narrow down your results based on these options.

Filtering Your Search Results

There are a total of 3 filter categories, Cause Areas, Show Me, and Suitable For. The Cause Area category will help you narrow down your search based on areas like animals, hunger, and disaster relief. There are a total of 27 cause areas; the filter column will display the 6 cause areas that have the most opportunities in your search area. The link to See All Cause Areas will display a modal with all 27 cause areas.

While the Show Me category allows you to select local or virtual opportunities, the Ohio Site VolunteerMatch site does not currently support the search function for virtual opportunities. If you are searching for these opportunities (or ongoing opportunities) please use the keyword search functionality and search on the words “ongoing” or “virtual.”

The Suitable For category explains if the opportunity is open to kids, teens, groups or seniors.
Selecting and Signing Up for an Opportunity

Once you have searched for an opportunity using the filters, click on the title of the opportunity that interests you to learn more. You’ll see basic information about the project, such as time, location, description and requirements.

To express your interest in the project, click “Signup.”

Complete the required information and click Send. If you are not already logged into your account, you will need to do so before continuing. You will be prompted to login/or create an account when you click “Signup.”

Once you’ve signed up for the opportunity, the project page will display the following options:

- **Status**: will show your attendance (e.g. will attend, may attend, waitlisted.) You can change your status by removing yourself from the project.
- **Waivers**: If you signed off on any waivers for this project, you can come back to this page to re-download the content.
- **Attachment**: If there were attachments sent to you when you signed up for the project (e.g. directions, waivers, information about the site, etc.), you can visit this page to re-download the content.
- **Opportunity Questions**: If you were asked opportunity specific questions when signing up for this project, you can visit this page to change your answers to these questions.
- **Calendar**: If there is a specific date for this project, you can choose to add it to your Google, Outlook, MSN or Yahoo calendar.
Managing Participants
The Manage Participants Page is a one-stop tool that empowers you to manage participants with simple filters and bulk actions

Getting to the Manage Participants Page
If you are the leader for a specific project, you will find a megaphone icon in your “Your Volunteering” table next to the project name. By clicking on this icon, you will be brought to the Manage Participants Page.

If you are assigned by someone else as a project leader, you will also receive an email with a direct link to the page.

Opportunity Admins and Leaders
There are two admin levels to manage a project – a Leader and an Admin (details about the permissions to the left).

For each project, you choose between recruiting for a leader or assigning an admin/leader. If you choose to recruit, a volunteer can sign up for the position. To recruit a leader, select “Edit” under “Opportunity Admin” box. Select “Recruit a leader”. If you’d like to write a position name and description, that will appear as a volunteer signs up.

To assign a Leader or Admin, follow these steps:
1. Select “Edit” under “Opportunity Admin”
2. Select “Assign Leader” and “Next”
3. Enter the email of the leader (note that the email must be associated with a VolunteerMatch account)
4. Select the admin level you would like the user to have

If needed, you can reassign or remove the Admin/Leader by selecting “Edit.”
Managing Participants: Attendee List

Through the Manage Participants interface, you can gather information about each participant’s signup (how and who signed them up, if they’ve confirmed), see if they’ve completed their questions, add or remove participants, send emails to groups or track hours for attendees.

SELECT & TAKE BULK ACTION
Check the top box to select all volunteers or select individuals to take bulk actions (icons at top right):
- Change attendance (remove, move to waitlist)
- Email selected participants
- Track hours for volunteers

ATTENDANCE VIEW
Through this filter, you can view the different lists for your program. Your default view will show attending. To view waitlisted or removed attendees, click on the appropriate list.

SORT & FILTER
Click the gray arrow to sort or filter based on the available options. Once you select an option, the list will automatically update.

STATES
The column shows 3 statuses:
- Attending (confirmed): a volunteer who signed themselves up or has confirmed.
- Attending (not confirmed): a volunteer who was signed up by someone else & has not yet confirmed.
- Attending (ext. guest): a guest who was signed up by someone else and doesn’t have access to confirm.

Additional statuses will show in other views or in export:
- Removed: not attending
- Waitlist: on the waitlist

SIGNUP METHOD
Shows how the volunteer was added to the project:
- Self: signed up themselves.
- Admin: an admin assigned them to the project from the participants page.
- Host: signed up using Guest Signup.

QUESTIONS STATUS
If the volunteer has answered all of their signup questions, this will show “complete”. If not, this column will show “incomplete.”

SIGNED UP BY
If the volunteer was signed up by an admin or a host, the name of the admin/host will appear in this column.
Managing Participants: Advanced Tools

Managing the Waitlist
If there are volunteers on the waitlist, select “Waitlist” from the Attendance View to manage the waitlist.

To reorder the waitlist, click on the icon to edit waitlist order.

Select a participant and drag and drop their name to the new desired order. Select save to update the new order.

Reports
To export your attendee list to excel, select the icon to export:

This will create an excel file of all participant information (including waitlist and removed attendees). This will include: participant name, email, status, signup method, signed up by information, host email, number of hours tracked, and project questions answers.

Tracking Hours
To track hours for participants, go to your attending Attendance View. Select all (or some) attendees, then select the Hours Tracking icon:

Enter a date, the number of hours volunteered select “Next” to answer the required hours tracking questions.

You can choose to notify participants - they will receive a standard email with the number of hours tracked, and the opportunity to view the hours that have been tracked.