

VOLUNTEER SPOT NOTES

We will first start with the basics....getting registered & linking to HFE's account:

- First, you must make sure that you are registered. Signing up is easy and only requires you to enter your first name, last name, e-mail address and create your password. For parents, it is very helpful to use the same e-mail address that is used on the classroom listservs, for teachers, it is best to use your work HFE e-mail address
- Log in at <https://www.volunteerspot.com> at the top right corner click "Sign In"
- Your "Dashboard" is like your "home page" – it will take you there first and show you a list of all of your sign-ups, group pages, upcoming invitations & reports you've ran
- First, you want to be sure that you are linked to Holy Family's "VolunteerSpot", which is a premium account – this will allow you to do all of the things a premium account offers and the fee is already covered through the school
 - To do this, click your name at the top right corner and select "Profile" in dropdown menu
 - As you scroll down, you will see Additional Information – Account Type
 - You will want to enter our Holy Family premium code, which is: **7LZ6CT5J**
 - Scroll down and click the blue Update button once it recognizes your code
- Once you do that, you can begin creating groups/sign-ups with all of the additional options that premium accounts allow

What are the differences between groups, sign-ups and spots??

- "Group" pages are larger in that they can contain multiple sign-ups in one place, so if you are a lead parent or teacher, or even a committee chair, a group page can be super handy in keeping your multiple sign-ups organized in one place for parents
 - Example: Sally, lead teacher for 6C, might create a Group Page called "6C Activities" – inside of that group page, she could create multiple Sign-Ups throughout the year, such as "Halloween Party", "Field Trip Drivers", "Advent Angels", "Testing Snacks", etc. which would all be listed on that page
 - Example: Chili Supper chairs could create a Chili Supper group page which could include multiple sign-ups, such as "Setting Up", "Desserts", "Game Room", etc.
- "Sign-Ups" are your individual activities as a whole, and they do not HAVE to be inside of a group page, they can just simply be a sign-up (this is your most common tool)
- "Spots" are the multiple details within a sign-up (these are required after you create a sign-up!)
 - For example, Home & School has a Sign-Up called Home & School, and within the sign-up, the chair has created a "Spot" for each meeting date where she will be able to log attendance of the parents for each meeting
 - Another example: 6C Lead parent can create a 6C group page, within the group page created a Halloween Party sign-up, and within that sign-up, she could create spots for "Bring Desserts", "Bring Pop", "Set up Tables", and "Organize the Games", or as many different individual tasks/things needed where within each spot, parents can sign up

How do I start creating sign-ups or group pages?

- The most common way that you will start will be to create a sign-up (if you decide later on that you would like to organize multiple sign-ups onto a group page, you can do that later on when you are more comfortable with the site)
- Volunteer Spot has you choose between 3 different types of sign-ups, a “No Date” sign-up, a “Single Day” sign-up, or a “Multiple Day” sign-up
 - What are the differences between these? When might I choose each?
 - Example: Class KA might want to set up a classroom snack schedule with repeating days or weeks throughout the year, so she would select “Multiple Day” sign-up which allows the teacher/parent to select multiple days throughout the whole year with one click of a button to repeat tasks
 - Example: One single event on one day, such as Homecoming Float, would want to select “Single Day” sign-up since it is not repeating and is one specific date
 - Example: No Date sign-up is pretty common for anything that does not require a specific date, so you can get a little creative with it, such as your general “Home and School” committee logging attendance, “Classroom Wish List”, “Advent Angels”, anything that you would like to organize that does not require a specific date

Creating a Single/Multiple Day Sign-Up:

- To get started creating a sign-up, make sure you are on your dashboard and click the orange button “Create New Sign-Up” at your top right of page
- First, you must select your sign-up kind, so select “Single or Multiple Days”
- You must then select a category, this part does not matter necessarily, but there are multiple options such as My Classroom, Potluck, Class Sign-Up, etc.
- You must then give the sign-up a name, such as “6C Halloween Party” as an example
- You then are able to add a welcome message which is what the parents will see when they are invited, so you could type, “Please sign up for a part in our 6C Halloween Party in October! Thank you!”
- You can then type in the location of your event
- Next, in the “Allow Participants To...” Section, if you keep the 3 boxes checkmarked, this will allow parents/organizers to view all of the details and who has signed up for what
- If you are creating something that would be best to be confidential where only the Organizer of that sign-up can see the details, you would want to UNCHECK these boxes
 - This would be handy for the teachers who are wanting to log their classroom donations for the year, or Parent Teacher Conferences
- Next, click the drop down arrow in your “What information do you want from participants” section
 - Here, you will see that parents are required to enter their full name, e-mail address and phone number when signing up to help
 - With our premium account, we are able to add other fields by clicking the blue “Add more fields” button as many times as you need
 - This is handy for multiple reasons – say you are doing a sign-up page for ordering 6th grade t-shirts, you could add a field called “Student Shirt Size”, or the child’s name, address, anything you might want the parent to be able to include when signing up
- After you are satisfied with the fields, click your blue “Next” button

- It will then bring up a calendar with the current month since this is a specific or multiple day sign-up
- You will then click your “Create New Spot” orange button to create spots within this sign-up
 - 1. Spot Type – you can either leave it on “I need people to do or attend something” or select “I need people to bring something”
 - 2. Spot Title – you must give the spot a title, so again for example, “Bring Desserts” within your Halloween Party sign-up
 - 3. Date – you MUST select a date for this spot since this is within a specific/multiple day sign-up
 - 4. How many people can sign up? You must select a maximum number of people, such as “3” for each different part to a Halloween party – if there is really NO maximum number of people, click the box and select “No Limit”
 - 5. Time: here, you can select “Start Time” button or “Start and End Times” button if you would like to input specific times for an event, for example, if Kindergarten is doing 50’s Day, perhaps they would want to select a time frame, such as “12:00 p.m. to 3:00 p.m.”, you would then click your “Auto-Fill Shifts by Time” button which would allow you to set up specific shifts within this time frame.
 - For example, clicking the Auto-Fill Shifts button will let you choose how long each shift should be, such as 1 hour long shifts, 30 minute shifts, etc. which will then show you how many spots will auto-fill, so if they wanted hour-long shifts between 12 and 3, 3 spots will pop up and click “Apply”
 - You would not want to break it down into specific time frames if you are creating multiple spots within a sign-up
 - If you are wanting to add multiple spots within your sign-up, a very quick short-cut would be to click “Quick Item Entry” button at the bottom (you can still select your start and end times, but cannot break it into shifts)
 - After clicking Quick Item Entry, this allows you to type in multiple things that you are needing help with, so for example, again using Kindergarten 50’s Day, you will see “Set up sock hop” as your first spot entered with boxes underneath to add more, such as adding “Bring treats”, “Work the classroom games”, and “Tear down party”
 - Again you will have to put a limit to how many parents can sign up for that spot, and you can also add any details in the “Extra Details” column
 - If you need to add more spots, click “Add New Row” button and add as many as you need
 - When all of your spots are entered, click blue “Apply” button at bottom
 - Finally, once all of your spots have been added, click the blue “Add” button
 - It will then pop up a box showing your date selected, and the multiple spots that you created along with the time frame – you are able to select a spot and click the “Edit” button if you need to make any changes or delete a spot, otherwise click OK
 - Once you have finished that, if you are only needing that ONE sign-up on ONE date, click your blue “Next” button (or click Preview button if you want to see how it looks)
 - Next, it will allow you to choose a theme or color scheme if you would like to, or click “Skip” or “Next” if you do not want to do that at this time
 - Be sure that if you do choose a theme, you click save before moving on to the next page or you will lose it!

- Finally, your last page is the Invite page – we have found that the easiest way to get the word out to your parents/committee is to select “Create a Link” in your “2-Invite Others” section
 - If you select the “Send email invites” option, it will require the e-mail to be sent through VolunteerSpot, therefore you cannot send them out to any listservs that HFE has set up, making this not very useful for our school
- After clicking “Create a Link”, it will bring up a small box and a large box – the small top box will include your link, simply click that box and it will highlight your link
- Once it is highlighted, you can right-click and select “Copy”
- You will then need to open up your e-mail (Teachers, you would open your school g-mail accounts, Parents, you would open up whichever e-mail that you use for communication with the school) and Compose a new e-mail
- In that e-mail, you can type whatever message you would like to send to the parents, and then right-click and select “Paste” to get your link into the e-mail
 - For example, “Parents, our 4th Grade Halloween Party will be on Friday, October 30th. Please click the link below to sign-up for contributing to the party! Thank you!” with your link pasted below
- You will then type the list-serv for who you are sending the e-mail to, such as 4bparents@hfehays.org for 4B parents, or your committee, such as float@hfehays.org for Homecoming Float, etc.
- Send your e-mail, and parents will then receive it, click the link and are then able to sign-up for what you are needing help with – it will send you notifications when people have signed up
- Back on your volunteer spot page, you must then click your blue “Done” button after you copied your link, which will make your page active and ready!

TO SELECT MORE DAYS on the sign-up and not just one single date:

- You would then go back into your sign-up, it will pull up the whole month’s calendar and show your already selected spots on the first date you started with – click that box/date
- If you want to repeat these same spots that you entered on one date ONTO multiple other dates, click the orange “Copy” button at your top right
- This will then pull up a calendar where you will be able to simple click ALL of the dates that you want these exact same details to also be copied over to
- For example, Kindepreg Snacks, perhaps the teacher wants to copy the same sign-up details onto multiple days through the month, she could then click Mondays and Wednesdays, for example, for any months she would like
- Once you select your repeating dates, click the blue “Copy” button
- You will then see that all of those dates are now in blue with the same sign-ups and details included

TO CREATE A NO-SPECIFIC DATE SIGN-UP:

- Most steps repeated from last section, click the orange “Create New Sign-Up” button
- In Sign-up Kind, select “No specific day” option this time
- Same steps – select a category, name the sign-up, add in a welcome message & location
- Again, you can choose if you want to make the sign-up details & people confidential by unchecking the 3 boxes, or leave them there if you want it public
- Add in any additional fields that you want at the bottom, any details you need from the parents when they sign up, click Next

- Again, you will now click the orange “Create New Spot” button and select either “I need people to do/attend something” or “I need people to bring something”
- Give it a title again, and select your maximum number of parents who can sign up
- It will allow you to choose a start and end time, or you can just simply skip the “Time” category if it is an on-going thing or something with no specific times
- Again, if you want to add multiple “spots” to this sign-up, such as 3 people bring food, 2 people bring paper products, 4 people bring games, etc. then you can quickly type these all in by selecting “Quick Item Entry” button, typing them in and clicking Apply, then the blue Add button
- Again, it will show you what your sign-up looks like with your “spots” included, and you will then click the blue Next button if you like how it looks (you can preview it)
- Again, you can choose a theme, click next once your theme is chosen or simply click Skip
- Finally, you will again click the “Create a Link” box to copy and paste the given link into an email that you compose to the group you are sending it out to

TO CREATE A GROUP PAGE

- To create a group page where you can add or include multiple of your own sign-ups in one spot, start at your dashboard and along the top menu click the “Organize” drop-down menu, then select “My Group Pages”
- From here, click the orange “Create Group Page” button
- It requires you to give your new group page a name, and you are welcome to add a description if you want to
- Scroll down, and you are able to give access to the school administrator to add sign-ups to this group page, or you can leave it as “None” so that only YOU can add sign-ups to this group page, click Next
- Next, it allows you to add a logo or image, but it is not required, so you can click Next
- At this time, it will let you add any sign-ups to your new group page, but it will NOT let you add sign-ups for events that have already occurred with a specific past date
- Click your drop-down menu “Choose a sign-up” and click on the sign-up that you want to add to the group
- Continue clicking as many as you want and you will see it add each one to one list, once you have them all added that you want, click Next again (it will also let you move them around if you want to change the order in which they appear on your group page)
- Finally, again, it lets you invite other participants to view the group, but if you do not need to RE-invite them, you can skip this step and click “Done”
 - If you DO want to re-invite people, you can checkmark “Get a shareable link” again to copy and paste into an e-mail sending it to the list-serv that you want
- It will now bring you to all of Holy Family’s GROUP pages that have been created in our school account – you can then scroll to find yours and edit it however you need to

HOW DO I EDIT A SIGN-UP OR SPOT THAT I ALREADY HAD MADE?

- Along the top toolbar, again select the Organize drop-down and click either “My Sign-Ups” or “My Group Pages” depending on which you need to edit
- For both of these options, it will bring up the whole list of sign-ups OR group pages
- In sign-ups, for example, scroll down to the one you need to edit and simply click the orange “Manage” button

- If it is a sign-up that does not involve specific dates, it will simply bring up your list of “spots” within the sign-up
- Select the “spot” that you need to edit and off to the right side click the blue “Edit” button
- This will bring up your editing page with the details including title, limit of people, times, entry names, etc. and edit what you need and click “Save”
- If it is a specific day or multiple day sign-up, it will first pop up the calendar with your selected dates, so simply click the date that you are needing to edit, and the rest of the steps are the same

HOW DO I REMOVE A PERSON OR CHANGE THE PERSON ON A SPOT?

- If you go back into your sign-up, it will again show you your list of spots for that particular sign-up
- Hover over the “spot” you need to edit and click the blue “Assign” button off to the right side
- This will pop up the list of parents/people who signed up for that spot, showing you their name, e-mail and phone number or other fields you requested
- Off to the far right side, you will see a “x” button, you would click that if you want to completely delete a parent out of that spot, if they maybe made a mistake or can not attend, whatever the reason may be
- This is also the spot where you could manually ADD in other people/parents yourself (this is very handy for our families who do not have internet access or e-mail and require a hard copy)

HOW DO I ADD A PERSON MANUALLY TO A SPECIFIC SPOT?

- Like the last question, you would select the sign-up that you need, select the spot that you want to ADD someone to and click the blue “Assign” button off to the right side
- For example, if you have a Halloween Party sign-up, perhaps you have multiple spots listed, i.e. “Bring desserts”, “Set up games”, “Tear down party after”, etc.
- After clicking “Assign” it will bring up your list of parents who signed up for that spot
- At the top right, you’ll see a box called “Click or type here to search” – if you click in there, it will let you select “Add a new participant”
- You can then add in the parent’s name and any other details you must have – if the parent does NOT have access to e-mail, skip the e-mail address box and just enter in the information that you can
- Click the blue “Done” button, and that parent is now added in
- If that parent has an e-mail address that you included, they will then receive a reminder a few days before the event, which is very handy

SOME ADDITIONAL HELPFUL QUESTIONS/ANSWERS:

*How to add a teacher or other lead parents to be an administrator of your volunteer spot sign-up page:

- a. Find the sign-up page you are wanting to add an administrator to and click Manage
- b. Click the “Details” tab along the top menu to the far left
- c. Scroll down to “Organizer Information” and click the “Add an assistant organizer” button
- d. It requires you to type in their name and their e-mail address (it must be the e-mail address that they use when logging into volunteer spot)
- e. Scroll down and click the blue “Update” button – if it pops up a red message saying that you couldn’t add them because the person is not registered with Volunteer spot yet, you must let them know that they must register first before they can become an assistant organizer
- f. Adding someone/multiple other people as an assistant organizer will give them access to logging in, editing the page, making changes and getting notifications on any changes to the sign-up

*How to DELETE a sign-up or group page that I created that I do not need:

- Log in and select the “Organize” button up top, select my signups or my group pages
- Scroll down to the page that you need to delete and click the orange “Archive” button to the far right – click “Archive” blue button again and “Close”
- It now put that page into your saved Archives – if you want to completely delete it, scroll up and find the white “Show” dropdown menu and select “Archived Sign-ups” – it will bring up your list of sign-ups that you archived – and you can simply click the “Delete” button or “Restore” it if you want to have it back

*HELP! I can’t find the sign-up that I need on my list!

- What to check first – first, click your dashboard and browse through to see if it is listed there, if it is not, click the “Show” pull-down menu and it will let you select either current sign-ups, PAST sign-ups, or Archived sign-ups
- OR, click the “Organize” button next to dashboard along the top and select either “My sign-ups” to get a FULL list of ALL of your sign-ups, or click “My group pages” to get a list of ALL of your group pages
- Also be sure that you are logging in with the exact e-mail address that you registered with! It will not list Holy Family’s sign-ups unless you use your premium code!

*How to input volunteers AFTER a meeting to log that they attended:

- g. Find your sign-up page you are wanting to do this for, for example, “Home & School” and click “Manage” button
- h. You will see the multiple “Spots” that are included in this group page; there was a spot made for each meeting, and in the title it says the meeting date
- i. Now, after a meeting is over and the parents have all signed in as they arrived, the president, vice president or anyone who would like to track this for H&S can now log in, click that meeting spot (such as Nov. 9th), and then click the “Assign” option

- j. You can then start inputting each parent that attended by clicking your "Click or type here to search" and "Add a New Participant"
- k. It requires you to type the parent/staff's name, but you do not have to put their e-mail address – I think it would probably be good to put their e-mail address if you are ever wanting to send them reminders so that they have a hard copy that they attended that meeting
- l. Now, it is a challenge the very first time logging parent's info in the group because you are typing them all out by hand, one by one, but AFTER you have all of them in one spot, when you go to do the NEXT spot on the next meeting, it will save ALL of the previous people in the system and you can then simply select each one in the drop-down menu for all of the following spots that year

*How to send out invitations for your Spot or Group after editing details, or to log in later to send ANOTHER invite out:

- m. Click your sign-up to edit again, and click "Manage" again
- n. Click the "Invite" tab along the top menu
- o. There you can again click "Get a shareable link" that you can copy and paste into your own e-mail to people

*How to log something for my classroom throughout the school year that is confidential and for my own information:

- p. For example, I created a practice sign-up by clicking "Create New sign-up" button, then then sign-up kind would be "No Specific Day", category – Classroom, Name – you choose, in my example I did, "2B Donation Tracking", can add a welcome message if needed, location – classroom
- q. I UN-checkmarked "allow participants to share w/ others, see who else has signed up, swap spots" – for donation tracking you do not need the parents to do these things and it is better to keep these confidential for only the teacher's knowledge
- r. Down in the "What info do you want from participants" section, click it, I added in a new field called "Donated Item Name" "Donation Amount" and "Date Donation Submitted", clicked next.
- s. Then you have to CREATE NEW SPOT (orange button top right), in spot type, "to do or attend something" can be left, spot title can be "2B Donation Tracking", for this example, and for "how many people? Click "No Limit" in drop-down. Click blue "Add" button. Then click blue "next" button.
- t. Can skip the "choose theme" page unless you want to make it decorative
- u. Click "Next" – the final page allows you again to share the link with someone else if you want to, same steps as before – for this example, for "2B Donation Tracking", I DO want parents to have the link so that they may log in and enter their donations made if they would like to, but they will not be able to view other parent's donations or details, so it is kept confidential between the teacher and each parent one on one – on the other hand, you are welcome to log your donations yourself and not share the link with others
- v. Click "Done" on this screen after you are done with the link
 - i. Now, when a parent opens this up, they will be able to click the orange "sign up" button where they will then be asked to log their name, email, donated item, amount \$\$, and date and click submit. The teacher will

then be able to log in at any time to view the donations or add in their own themselves for someone if they would like to

*How to print a report based on who signed up/any activity from a particular day?

- Log in and select your sign-up you need a report on, along the top blue toolbar select “Reports” button
- Click what type of report you would like to run, such as who is coming to an event, who signed up to contribute something, tracking hours of parents volunteering, etc.
- Click “View & Print” and print your report when you find what you need

*How do I send a message, update or alert to the parents on my sign-up/spot?

- There are many options! Open up your sign-up needed in your dashboard, click the “Messages” tab in blue menu bar
- Choose “Message” or “Thank you Note” to send
- Select the recipients for your message, you can choose EVERYONE or select only specific participants based by date or shift
- Customize your message and press Send! The message will go to those parents/staff on the sign-up you selected and it will include a link to your sign-up sheet that they can go look at again

*Can I print a paper sign-up form to pass around or post and have volunteers write in their commitments? YES!

- Go to My Sign-Ups and select the “Manage” button
- Click the “Reports” menu and choose “Sign-up/Check-in Sheet” button
- You can print this sheet for a whole month, day, or select a custom date range
- You can also checkmark “Make this a check-in sheet” if you want it to be a check-in sheet instead of a sign-up sheet
- Also, there is an iPad app for Volunteer Spot if you ever want to pass around an iPad to have parents sign in for a meeting/event which will directly input all of the data into the school VolunteerSpot page!

*If at any time you try clicking a sign-up and it says that the group/page has been “locked”, you can always click “Unlock” to continue your editing/look something up – this just shows each user when the last person was logged into that group/sign-up previously

*On the website, at your top right side there is a “Help” button – this actually includes brings up a list of Frequently Asked Questions and Quick Tip Videos, which are very helpful and show you step-by-step instructions for different events/scenarios

*It does allow you to copy over the exact same groups to next school year if you plan to repeat them again in the future

*It also allows you to create “Classroom With Lists” or “Giving Tree” sign-ups, as well – find out more about these on the “Help” page