



ASSESSMENT COORDINATOR

Scheduling: Individual Volunteers

IMPORTANT:

If you are assigning a volunteer to a scheduled Activity, it must have shifts occurring either today or in the future. If you need to assign a volunteer to an Activity that occurred in the past, you will need to go to Assign >> From Scheduled List and adjust the filters to display Activities for the desired date range.

1. Type part of the volunteer's name in the Quick Search bar **OR** ...

The screenshot shows the BETTER IMPACT dashboard. The 'Assign' dropdown menu is open, showing options: 'From Unscheduled List', 'From Scheduled List', 'From Calendar', 'From Pending Signup List', and 'From Volunteer Profile'. The dashboard also displays status updates for Volunteers (0 Applicant, 2 Inactive, 0 Short Term, 2 Long Term) and Administrators (0 In Process, 0 Archived, 150 Accepted). There are buttons for 'Qualification Approvals', 'Expiring Qualifications', 'Expired Qualifications', 'Hours Approvals', 'Volunteers on the Clock', 'Pending Signups', and 'Custom Field Approvals'. A 'Message from Skate Ontario' is visible on the right side.

2. Go to: Assign >> From Volunteer Profile
 - Search for the desired profile to edit (See: [Search](#))
 - In the Search Results section, hover over the Options [] icon beside the person
 - Click on "Edit"
3. Click on the "Assign" tab
4. In the "Filters" section you can choose to include specific activities based on a variety of conditions. These selections can then be made your default filters when you assign volunteers from within their profiles.
5. Click on the link to the desired Activity. If this is a scheduled Activity, you can filter for specific days, start times, end time, whether or not the volunteer has signed up already, and the page size (which will determine how many shifts display). Click the [Filter Shifts] button to apply the filters you have chosen.
6. Assign the volunteer:
 - For scheduled activities, check the box in the "As" column for each applicable shift. You can also click the "As" box at the top of the list to assign the volunteer to all shifts. Click the [Save] button to assign the volunteer to the selected shifts, then click the [Close] button when you are done.
 - For unscheduled activities, check the "Assigned" box and click the [Save] button

The screenshot shows the 'Assign' page for a volunteer named Dia Sue-Wah-Sing. The 'Filter Activities' section is active, showing filters for 'Include activities that the volunteer is qualified for' and 'Include activities for which the volunteer is currently Generally Available'. A table of activities is displayed with columns for 'Assessment Days', 'S', 'Av', 'Q', 'SU', 'As', 'BL', 'Start Date', and 'End Date'. The 'As' column has checkboxes for each activity.

Assessment Days	S	Av	Q	SU	As	BL	Start Date	End Date
Durham Skating Club			<input checked="" type="checkbox"/>				12/17/2020	12/17/2020
Skate Canada Pickering			<input checked="" type="checkbox"/>				12/1/2020	12/1/2020

The screenshot shows the 'Assign' page for a volunteer named Dia Sue-Wah-Sing, filtered for 'Assessment Days - Durham Skating Club'. The filter shows that the volunteer is qualified for the activity and can see it. A table of shifts is displayed with columns for 'Date', 'Start Time', 'End Time', 'L', 'O', 'T', 'SU', 'As', and 'End Date'. The 'As' column has checkboxes for each shift.

Date	Start Time	End Time	L	O	T	SU	As	End Date
Thursday, December 17, 2020	4:00 PM	6:00 PM				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12/17/2020
						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12/1/2020