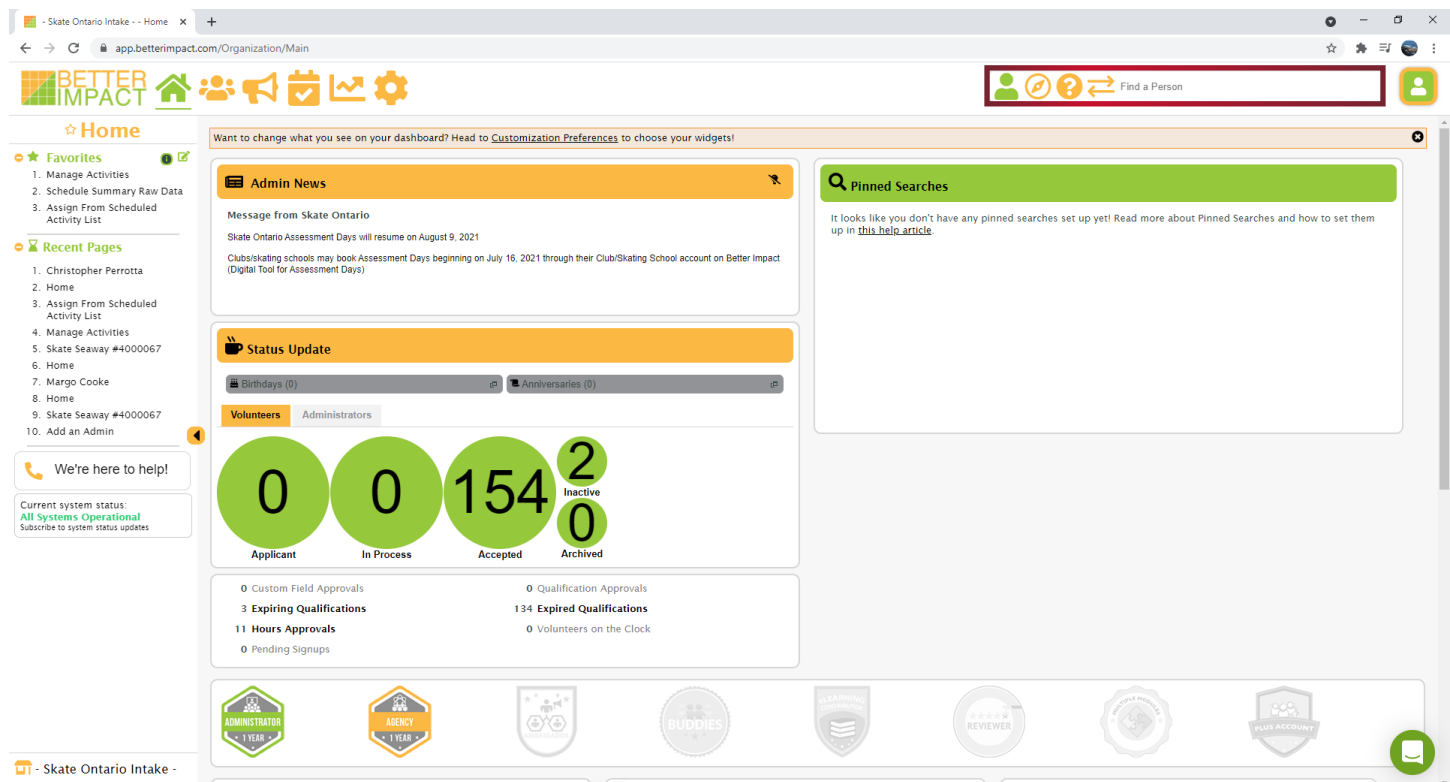


# Assessment Coordinator - Scheduling: Individual Volunteers

**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.

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



The screenshot shows the Skate Ontario Intake system dashboard. The top navigation bar includes the Better Impact logo, a home icon, a search bar with the text "Find a Person", and a user profile icon. The dashboard is divided into several sections:

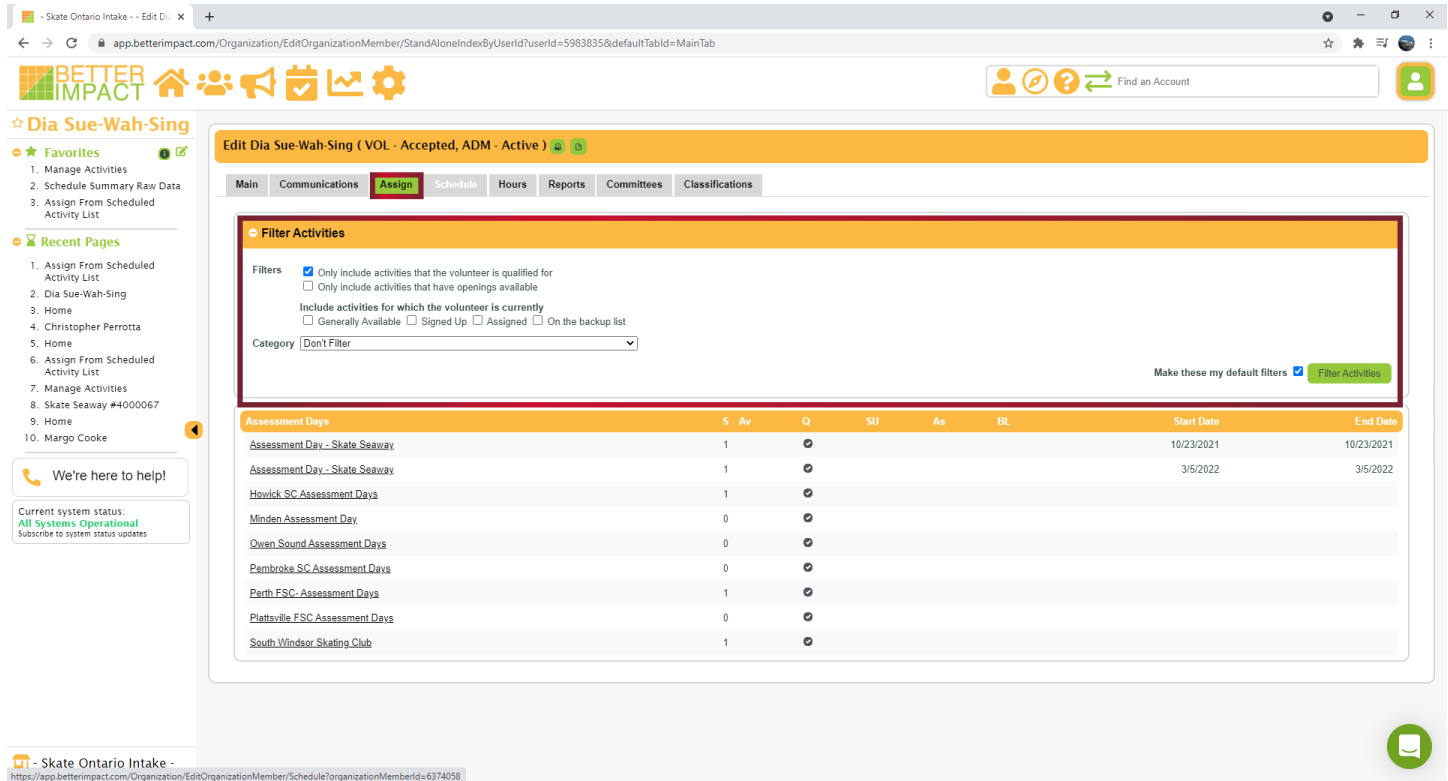
- Home:** A sidebar on the left with links to "Favorites" (Manage Activities, Schedule Summary Raw Data, Assign From Scheduled Activity List) and "Recent Pages" (Christopher Perrotta, Home, Assign From Scheduled Activity List, Manage Activities, Skate Seaway #400067, Home, Margo Cooke, Home, Skate Seaway #400067, Add an Admin).
- Admin News:** A message from Skate Ontario stating that Assessment Days will resume on August 9, 2021, and that Clubs/Skating schools may book Assessment Days beginning on July 16, 2021.
- Status Update:** A section showing the number of volunteers in different stages: 0 Applicants, 0 In Process, 154 Accepted, and 2 Inactive. Below this, there are counts for various approvals: 0 Custom Field Approvals, 3 Expiring Qualifications, 11 Hours Approvals, 0 Pending Signups, 0 Qualification Approvals, 134 Expired Qualifications, and 0 Volunteers on the Clock.
- Pinned Searches:** A section on the right indicating that no pinned searches are currently set up.
- Footer:** A row of icons representing different roles or achievements: Administrator (1 Year), Agency (1 Year), Buddies, Learning, Reviewer, and Plus Account.

**Step 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 and Click on “Edit”

**Step 3:** Click on the “Assign” tab

**Step 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.



The screenshot shows the 'Edit Dia Sue-Wah-Sing (VOL - Accepted, ADM - Active)' page in the Better Impact system. The 'Assign' tab is selected, and the 'Filter Activities' section is highlighted with a red box. Below this, a table lists various assessment days with columns for S, Av, Q, SU, As, BL, Start Date, and End Date.

**Filter Activities**

Filters: ☒ Only include activities that the volunteer is qualified for  
☐ Only include activities that have openings available

Include activities for which the volunteer is currently:  
☐ Generally Available ☐ Signed Up ☐ Assigned ☐ On the backup list

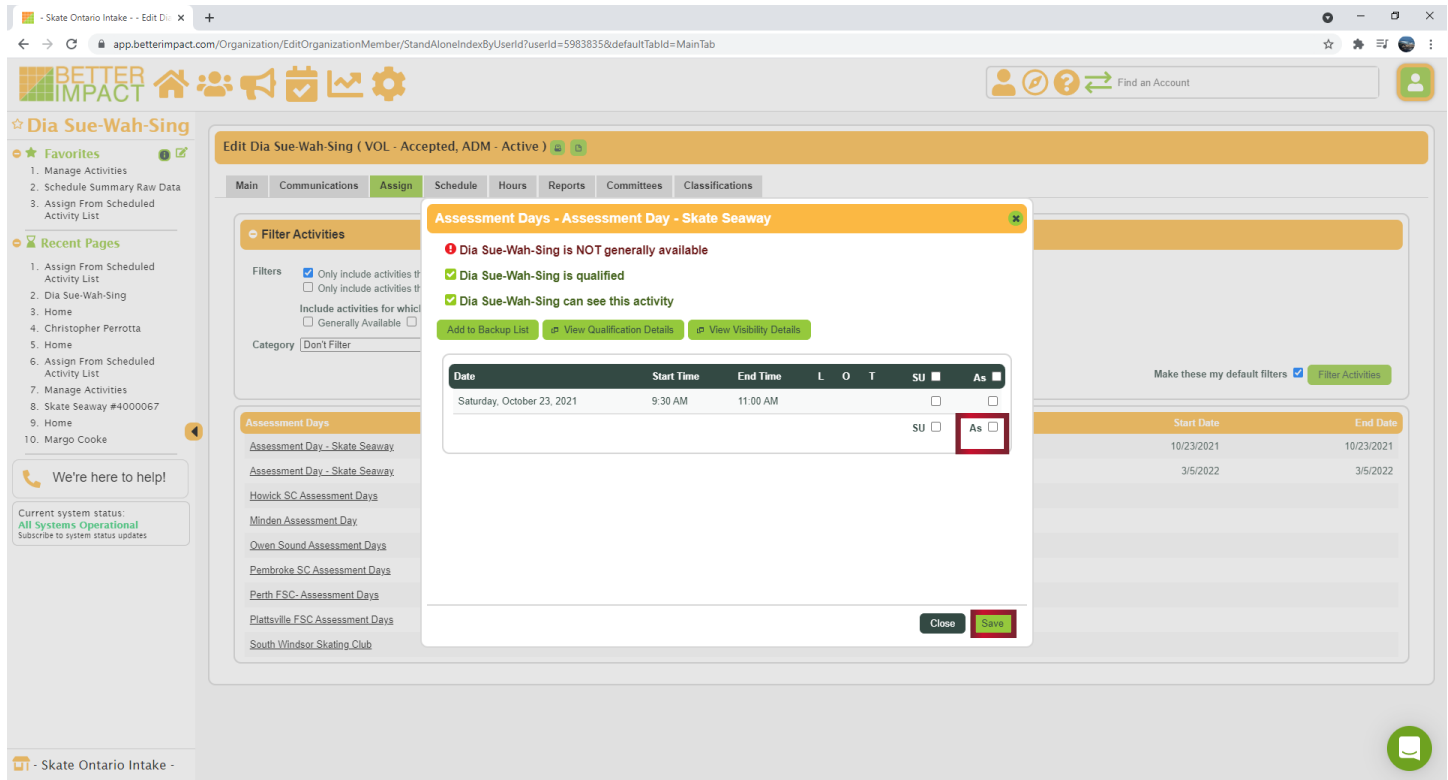
Category:

Make these my default filters ☒ [Filter Activities](#)

Assessment Days	S	Av	Q	SU	As	BL	Start Date	End Date
Assessment Day - Skate Seaway	1		☑				10/23/2021	10/23/2021
Assessment Day - Skate Seaway	1		☑				3/5/2022	3/5/2022
Howick SC Assessment Days	1		☑					
Minden Assessment Day	0		☑					
Owen Sound Assessment Days	0		☑					
Pembroke SC Assessment Days	0		☑					
Perth FSC- Assessment Days	1		☑					
Plattsville FSC Assessment Days	0		☑					
South Windsor Skating Club	1		☑					

**Step 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.

**Step 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 'Edit Dia Sue-Wah-Sing' page in the Better Impact system. The 'Assign' tab is active. A modal window titled 'Assessment Days - Assessment Day - Skate Seaway' is open, displaying a table of assessment days. The table has columns for Date, Start Time, End Time, L, O, T, SU, and As. The 'As' column has a red box around the 'As' header and a checkbox for the first row. The modal also contains a 'Filter Activities' section and a 'Save' button.

Date	Start Time	End Time	L	O	T	SU	As
Saturday, October 23, 2021	9:30 AM	11:00 AM				<input type="checkbox"/>	<input type="checkbox"/>
						SU <input type="checkbox"/>	<input type="checkbox"/>