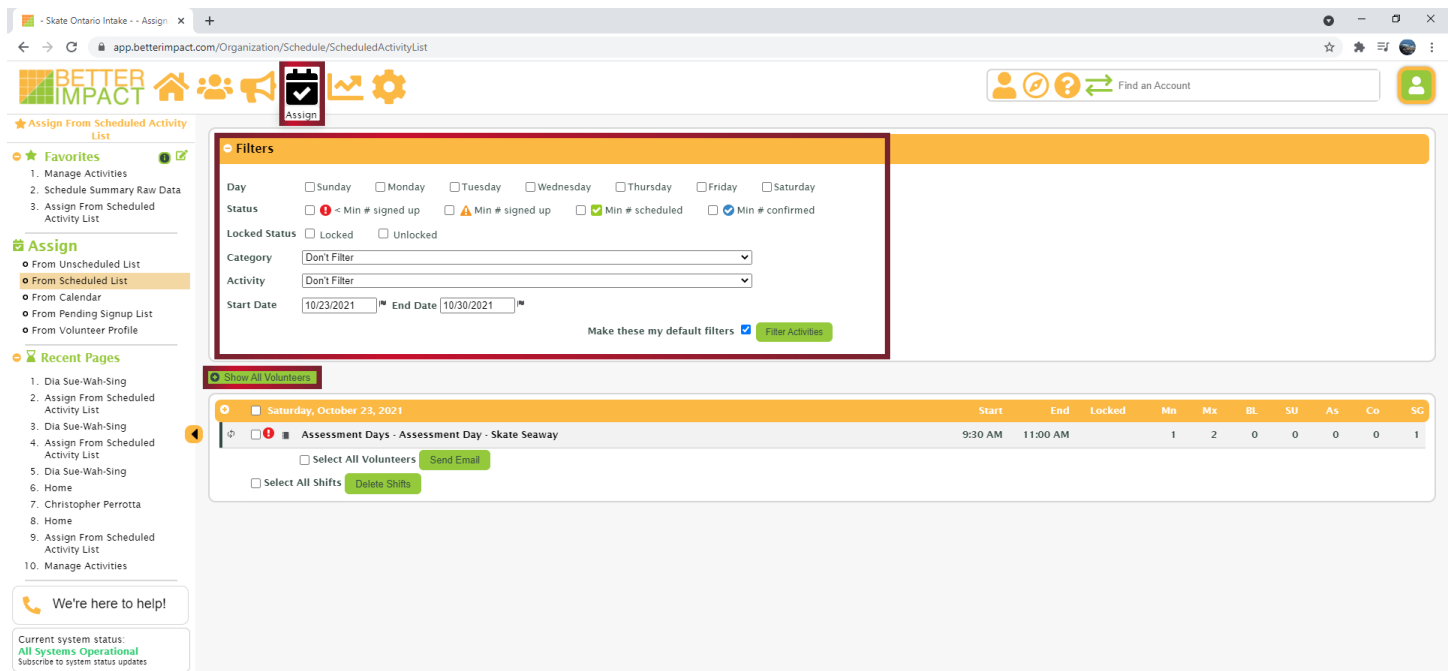


Assessment Coordinator - Scheduling: View Assignments and Assigning

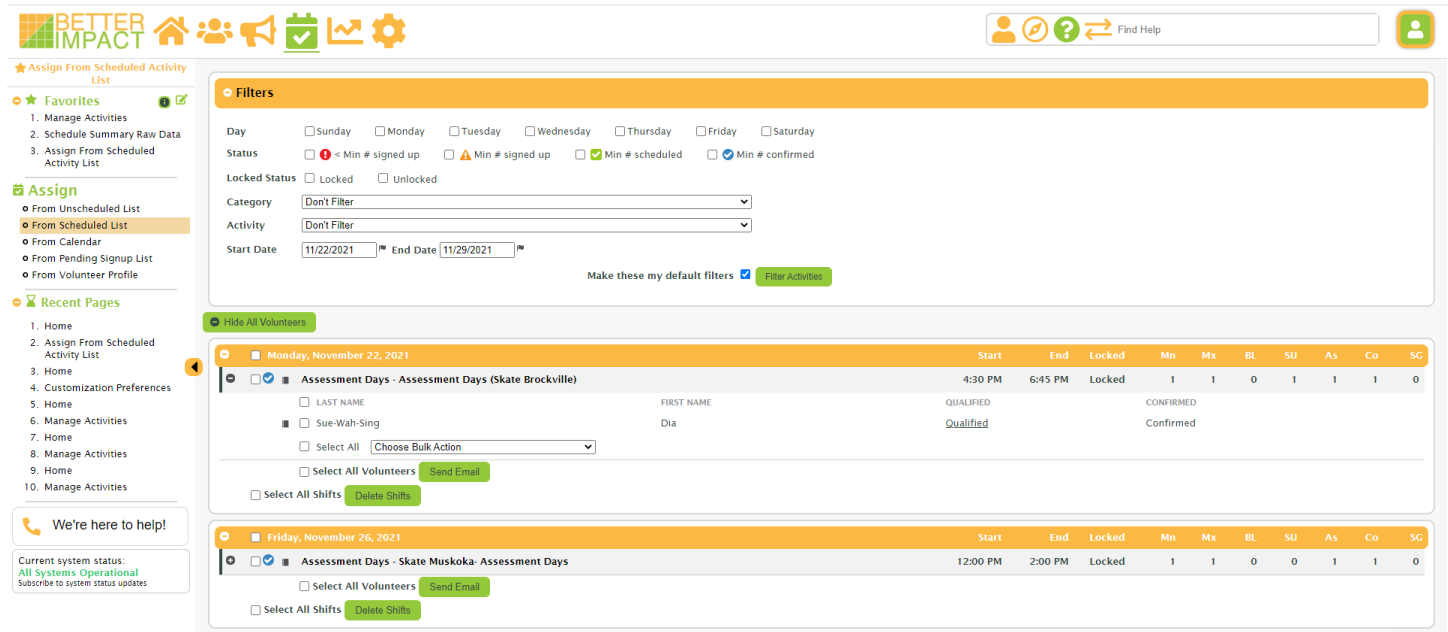
Step 1: Go to: Assign

Step 2: Select the desired filters to apply and click the 'Filter Activities' button

Step 3: Click the '+Show All Volunteers' button. If you hover over the Options button beside an assigned volunteer, you can (Confirm, Remove, View, Edit, Send Email or Send Mobile Email)

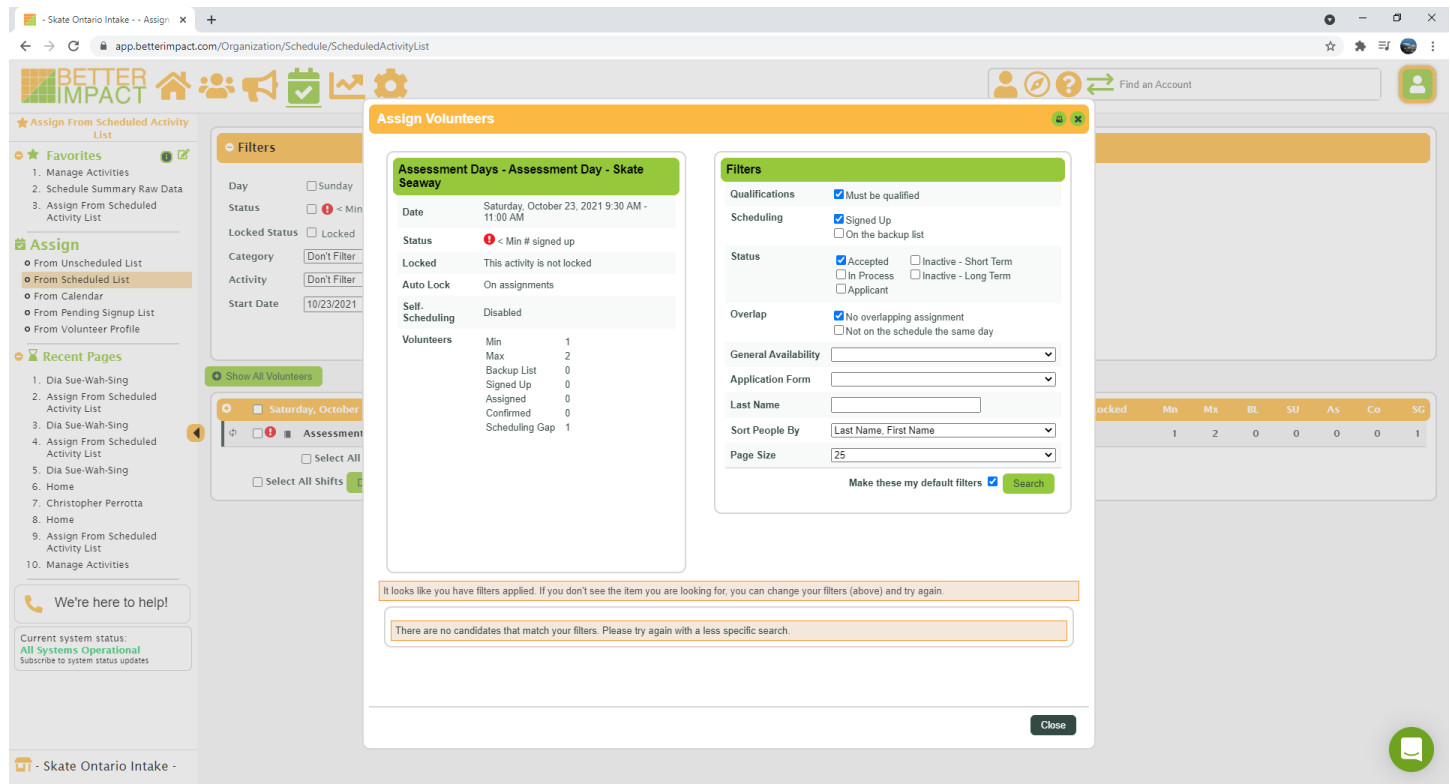


The screenshot shows the 'Assign' page in the Better Impact system. The left sidebar contains navigation links: 'Assign From Scheduled Activity List', 'Favorites', 'Assign' (with sub-links: 'From Unscheduled List', 'From Scheduled List', 'From Calendar', 'From Pending Signup List', 'From Volunteer Profile'), 'Recent Pages', and a 'We're here to help!' link. The main content area has a 'Filters' section with checkboxes for Day (Sunday-Saturday), Status (< Min # signed up, Min # signed up, Min # scheduled, Min # confirmed), Locked Status (Locked, Unlocked), Category (Don't Filter), Activity (Don't Filter), and Start/End Date (10/23/2021 to 10/30/2021). A 'Filter Activities' button is at the bottom of the filters. Below the filters is a '+ Show All Volunteers' button. The main table displays activities for Saturday, October 23, 2021. The table has columns: Start, End, Locked, Mn, Mx, BL, SU, As, Co, SG. The first row is 'Assessment Days - Assessment Day - Skate Seaway' with Start 9:30 AM, End 11:00 AM, Locked, Mn 1, Mx 2, BL 0, SU 0, As 0, Co 0, SG 1. Below the table are links for 'Select All Volunteers', 'Send Email', 'Select All Shifts', and 'Delete Shifts'.



The screenshot shows the 'Assign' page in the Better Impact system. The left sidebar is identical to the previous screenshot. The main content area has the same 'Filters' section. Below the filters is a '+ Hide All Volunteers' button. The main table displays activities for Monday, November 22, 2021. The table has columns: Start, End, Locked, Mn, Mx, BL, SU, As, Co, SG. The first row is 'Assessment Days - Assessment Days (Skate Brockville)' with Start 4:30 PM, End 6:45 PM, Locked, Mn 1, Mx 1, BL 0, SU 1, As 1, Co 1, SG 0. Below the table are links for 'Select All Volunteers', 'Send Email', 'Select All Shifts', and 'Delete Shifts'. The second row is 'Assessment Days - Skate Muskoka - Assessment Days' with Start 12:00 PM, End 2:00 PM, Locked, Mn 1, Mx 1, BL 0, SU 0, As 1, Co 1, SG 0. Below this table are links for 'Select All Volunteers', 'Send Email', 'Select All Shifts', and 'Delete Shifts'.

Step 4: Optional: Select multiple volunteers and scroll to the bottom and choose the desired option from the “Choose Bulk Action” drop down (Confirm / Unconfirm Selected Assignments, Remove Selected Assignments, Send Email)



The screenshot shows the 'Assign Volunteers' modal in the Better Impact system. The modal is titled 'Assign Volunteers' and contains several sections:

- Assessment Days - Assessment Day - Skate Seaway:**
 - Date: Saturday, October 23, 2021 9:30 AM - 11:00 AM
 - Status: ● < Min # signed up
 - Locked: This activity is not locked
 - Auto Lock: On assignments
 - Self-Scheduling: Disabled
 - Volunteers:

Min	1
Max	2
Backup List	0
Signed Up	0
Assigned	0
Confirmed	0
Scheduling Gap	1
- Filters:**
 - Qualifications: ☒ Must be qualified
 - Scheduling: ☒ Signed Up, ☐ On the backup list
 - Status: ☒ Accepted, ☐ In Process, ☐ Applicant, ☐ Inactive - Short Term, ☐ Inactive - Long Term
 - Overlap: ☒ No overlapping assignment, ☐ Not on the schedule the same day
 - General Availability: [Dropdown]
 - Application Form: [Dropdown]
 - Last Name: [Text Input]
 - Sort People By: [Dropdown: Last Name, First Name]
 - Page Size: [Dropdown: 25]
 - Make these my default filters: ☒ Search

Below the modal, a message states: "It looks like you have filters applied. If you don't see the item you are looking for, you can change your filters (above) and try again." Below this is a search bar with the text: "There are no candidates that match your filters. Please try again with a less specific search."

The background shows the 'Assign From Scheduled Activity List' page with a sidebar containing 'Favorites' and 'Recent Pages'.

SCHEDULED ACTIVITIES: You will see the name of the activity, the category to which it belongs, and a summary of the schedule. Below that is a button to place the volunteer on the Backup List.

To filter the shifts in the display:

Step 1: Select the days of the week to display. Note that only days with existing shifts scheduled will be displayed.

Step 2: Select the start times to display. Note that only start times associated with existing shifts scheduled will be displayed.

Step 3: Select the desired status (**Signed Up** - show shifts volunteer has already signed up for, **Not Available** - show shifts volunteer has not signed up for, **All** - show all shifts).

Step 4: Click on the [Filter Shifts] button.

Each shift will be displayed by date, including the start time, end time, lock status, if the volunteer has another assignment that overlaps with this one, if the volunteer has another assignment on that day, and whether or not the volunteer has already confirmed for the shift.

- Click in the appropriate box in the “Signed Up” (Su) column to mark the person as available for that shift. You can return to assign the person later.
- Click in the appropriate box in the “Assigned” (As) column to assign the volunteer to that shift. You can remove the person from the assignment later, if necessary.
- Click on the [Save] button to proceed or the [Cancel] button to cancel the operation. If you have made changes, the information displayed will be updated.