Volunteer Management Information System

OPOC User Guide | Version 1

Contents

1.0 - Welcome to VMIS

Welcome to the **Volunteer Management Information System**, or **VMIS**. VMIS is a web application that allows volunteers within the military community to find and apply for volunteer opportunities, record and track their volunteer hours, and manage their volunteer service record. VMIS also assists the Army Volunteer Corps (AVC) in managing these dedicated volunteers.

This guide is written **specifically for Organization Points of Contact**, or **OPOCs**, and describes the functionalities relevant to their role, such as managing volunteers, taking action on volunteer hours and applications, and managing positions. For information on using VMIS as a volunteer or Army Volunteer Corps Coordinator (AVCC), refer to the **VMIS User Guide for Volunteers** and **VMIS User Guide for AVCCs**, respectively.

To access VMIS, visit the following website: https://vmis.armyfamilywebportal.com

VMIS Home Page

Supported browsers for AFWP Applications are Internet Explorer 11, Chrome, and Firefox. You may experience functionality and appearance differences when using the application depending on your browser version.

> ***Note:*** *Beware of system timeouts. Be sure to save your progress frequently, especially while filling in long forms.*

1.1 - Glossary

The following abbreviations are helpful to know as you are going through this guide:

- **OPOC: Organization Point of Contact** – Person in charge of a particular volunteer organization who typically approves volunteer applications and certifies or rejects volunteer hours within that organization.
- **AVC: Army Volunteer Corps** – Army Community Service program that organizes and assists Army volunteering.
- **AVCC: Army Volunteer Corps Coordinator** – Person who runs a volunteer program at a garrison and manages one or more OPOCs.
- **VMIS: Volunteer Management Information System** - Web application that allows volunteers within the military community to find and apply for volunteer opportunities, record and track their volunteer hours, and manage their volunteer service record.
- **AFWP: Army Family Web Portal** – Online hub for ACS, providing access to systems and services for military families, soldiers, and sponsors.
- **ACS: Army Community Service** – Collection of programs to assist commanders in maintaining readiness of individuals, families, and communities within America's Army by developing, coordinating, and delivering services which promote self-reliance, resiliency, and stability during war and peace.
- **ARC: AFWP Resource Center** – Repository where important information for both family members and Army Community Service (ACS) staff is maintained.
- **SSO: Single Sign-On** – Feature that allows users to log in to any AFWP systems with the same email and password as their AFWP Account, reducing the number of usernames and passwords between systems without any compromises of security.
- **Non-user –** Volunteer who is not directly using VMIS to log their volunteer hours.

1.2 - VMIS Registration

Users who register for VMIS are required to have an account for the Army Family Web Portal, or AFWP. This account, also known as an **AFWP Account**, is used to **log in to VMIS** or any other permitted **Army Community Service (ACS)** system. An AFWP Account can be created directly through the VMIS website, or through the **AFWP Resource Center (ARC)**.

The following sections contain more information about AFWP and the features of having an AFWP Account.

1.2.1 - Army Family Web Portal (AFWP) & AFWP Accounts

The **Army Family Web Portal (AFWP)** is an online hub for ACS, providing access to VMIS and Issue Management systems and services to sponsors and family members. VMIS users can visit AFWP to create an **AFWP Account**, which can be used to **log in to VMIS** and other permitted ACS systems.

Registering directly through the VMIS website will **automatically create an AFWP Account**, using the same email address and password provided during registration.

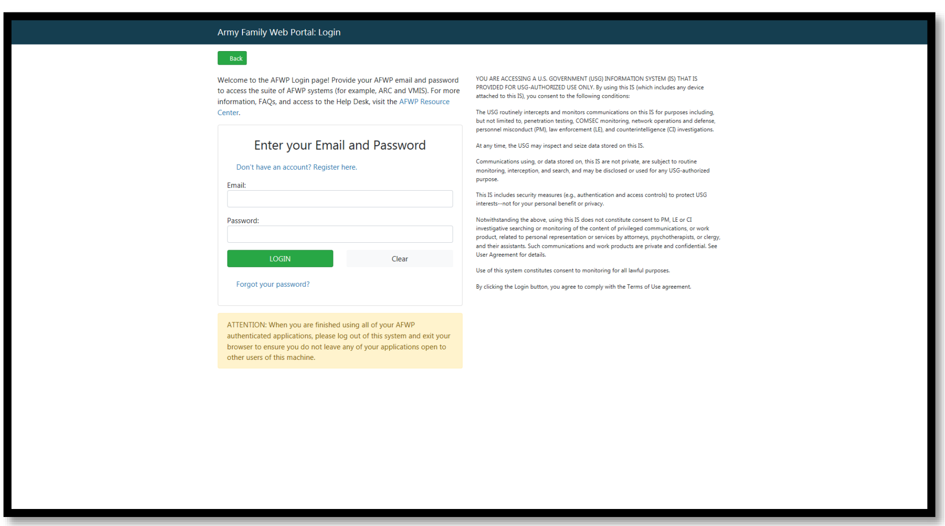
Refer to **Create an AFWP Account** to complete the registration process directly on VMIS**,** or visit the following page on the AFWP Resource Center: https://www.armyfamilywebportal.com/

1.2.2 - Single Sign-On (SSO)

An **AFWP Account** is used to log in to VMIS through the **Single Sign-On (SSO)** feature. This feature allows users to provide the same email and password as their AFWP Account when logging in to VMIS, reducing the number of usernames and passwords to remember between systems without any compromise of security.

Refer to **Army Family Web Portal (AFWP) &** AFWP Accounts for more information on creating an AFWP Account to log in to VMIS.

> ***Tip:*** *If you have ever created an AFWP Account for a different ACS system, you can log in to VMIS using the same credentials as those systems. See* ***Log In to VMIS****.*



Single Sign-On Login Page

1.2.3 - Create an AFWP Account

1. Select **Register** on the **VMIS Home Page**, or select Log In from the **VMIS Home Page** and then select **Register**.
2. Enter the required information into the **following data fields**:
    - *Email, Password,* and *Confirm Password.*

> ***Note:*** *SSO passwords are* ***case-sensitive*** *and require a minimum of* ***15 characters*** *that include the following:*
>
> *2 uppercase letters, 2 lowercase letters, 2 numbers, and 2 special characters (!#$%^@).*

3. Select Register.
4. An **automated email** will be sent to the email that was entered in step 2 with a link and a token number.
5. Select the link in the email to verify the account.
6. On the page that appears, enter the **email address and the token number** provided in the automated email.
7. Select Verify Email.

1.3 - Log In to VMIS

1. Select Log In from the **VMIS Home Page**.
2. Enter the **Email** and **Password** you used to create your AFWP Account into the respective fields on the page that appears.
3. Select Log In.
4. When logging in for the first time, you will need to create your **AFWP Profile** (if you don't already have one) and your **Volunteer Profile**. Enter the required information into the following data fields:
    - *First Name, Middle Initial (optional), Last Name, Date of Birth, Military Community, Branch, Component, Disposition(s), Preferred Contact Method, Volunteer Email, Primary Phone, Secondary Phone (optional), Work Experience (optional), Volunteer Experience (optional),* and *Special Skills, Interests, and Hobbies (optional).*
5. Select Save.

1.4 - Become an OPOC

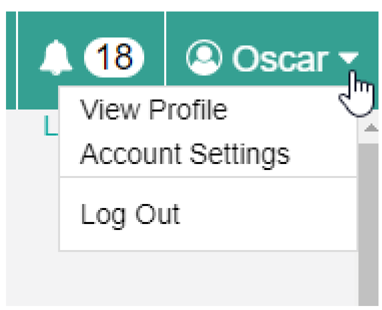
1. You will receive an **email** from your AVCC inviting you to become an OPOC.
2. In the invitation you will receive two sets of instructions: (1) if you already have an AFWP account and are registered for VMIS or (2) if you do NOT have an AFWP account and are not registered for VMIS. Save the email and **follow the instructions carefully.**

> ***Note:*** *If you were already a VMIS user before being invited to become an OPOC, you can go to your Dashboard and accept your OPOC Invitation in your Notifications area at the top of the Dashboard and continue to step 4. Otherwise, continue to step 3.*

3. Select the **link** in the email or copy and paste it into your browser.
4. Follow the prompts provided to accept your invitation and fill out your Administrator Profile.

1.5 - AFWP Account Management

The **user account menu** provides options to update a user's personal, demographic, and volunteer information. All user types can access this page via the upper-right corner of any AFWP System or directly to the URL (https://account.armyfamilywebportal.com/).
It also provides a way to customize **account settings**, such as email notification preferences, and it is used to **log out** of a current VMIS session.



User Account menu

1.5.1 - View and Update Profile

1. Select your **user name** on the right side of the toolbar at the top of any VMIS page.
2. Select **View Profile** from the drop-down menu to update your **AFWP Profile**, **Administrator Profile**, or **Volunteer Profile**.
3. **Add** or **modify** the information in the following data fields:

- *First Name, Middle Initial (optional), Last Name, Date of Birth, Military Community, Branch, Component, Disposition(s), OPOC Organizations Note (optional), Work Email, Commercial Work Phone, DSN Phone (optional), Country, Work Address, City, State, ZIP/Postal Code, Preferred Contact Method, Volunteer Email, Primary Phone, Secondary Phone (optional), Work Experience (optional), Volunteer Experience (optional), and Special Skills, Interests,* and *Hobbies (optional).*
- *Check the box next to "Receive Email Notification" if you wish to receive them.*

> ***Note:*** *If you opt in to receive email notifications, you will receive one email for every notification you receive in VMIS. You must input a work email and/or a volunteer email on your profile in order to receive email notifications.*

4. Select Save.

1.5.2 - View and Update Account Settings

1. Select your **user name** on the right side of the toolbar at the top of any VMIS page.
2. Select **Account Management**.
3. Select the **pencil icon** next to *Email* and *Password*.
4. **Add** or **modify** the selected information.
5. Select Save to apply the changes.

> ***Warning:*** *Updating an email address or password on this page will* ***also change the email or password of the logged in AFWP Account****.*
>
> *To change only an administrator or volunteer email address instead, refer to View and Update Profile.*

1.5.3 - Connect a CAC

Users can connect their own **Common Access Card (CAC)** with their AFWP Account, making it possible to **log in using their CAC** instead of an email address and password. The CAC must be inserted into the CAC reader **before** beginning the CAC connection process.

To **connect a CAC**:

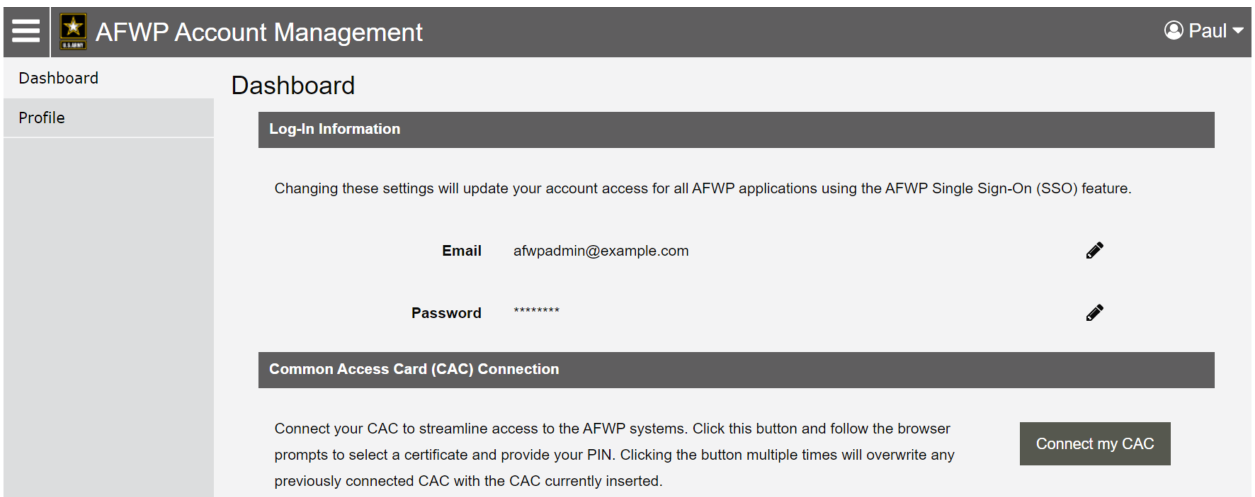
1. Once you login, select "Account Management" from the drop down in the upper right corner.

2. Select `Connect my CAC` on the AFWP Account Management page to begin the CAC connection process, and keep the following in mind as you read the instructions on the site carefully:

- The connection process will require the CAC's **associated pin** to be entered correctly **each time** the CAC is used to log in.

- You **can't connect an expired CAC**, your browser will not allow you to authenticate your CAC.

- Using a CAC may require you to download specific CAC certificates for specific browsers. Make sure to do this before attempting to connect a CAC to your AFWP Account.

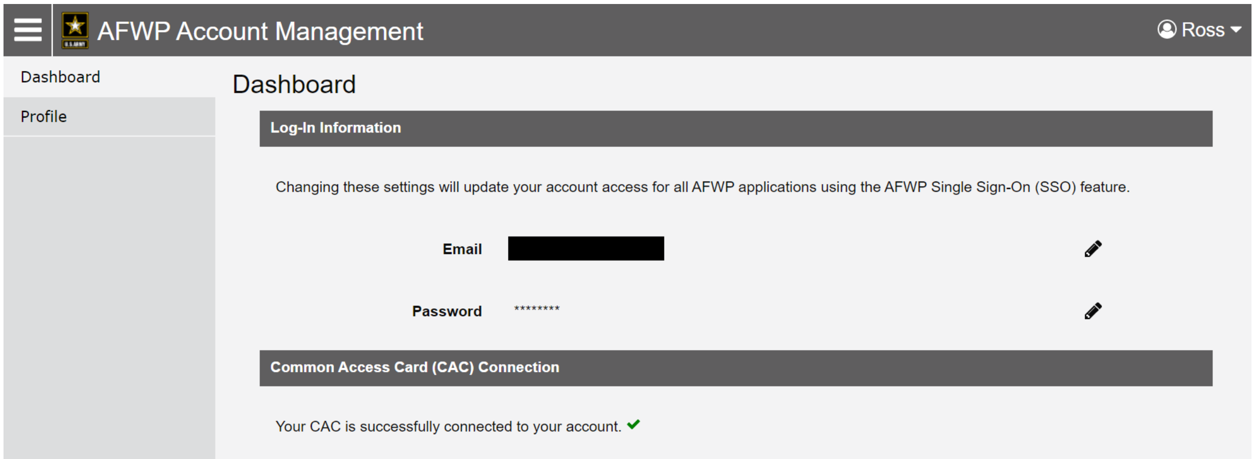


3. Follow the prompts that appear.

1.5.4 - Check if a CAC is connected to your account

- An AFWP account can only have one CAC connected at a time

- To see if you have a CAC connected to your AFWP account, go to Account Management. You should see a confirmation there whether you login with your CAC or with your username/password.



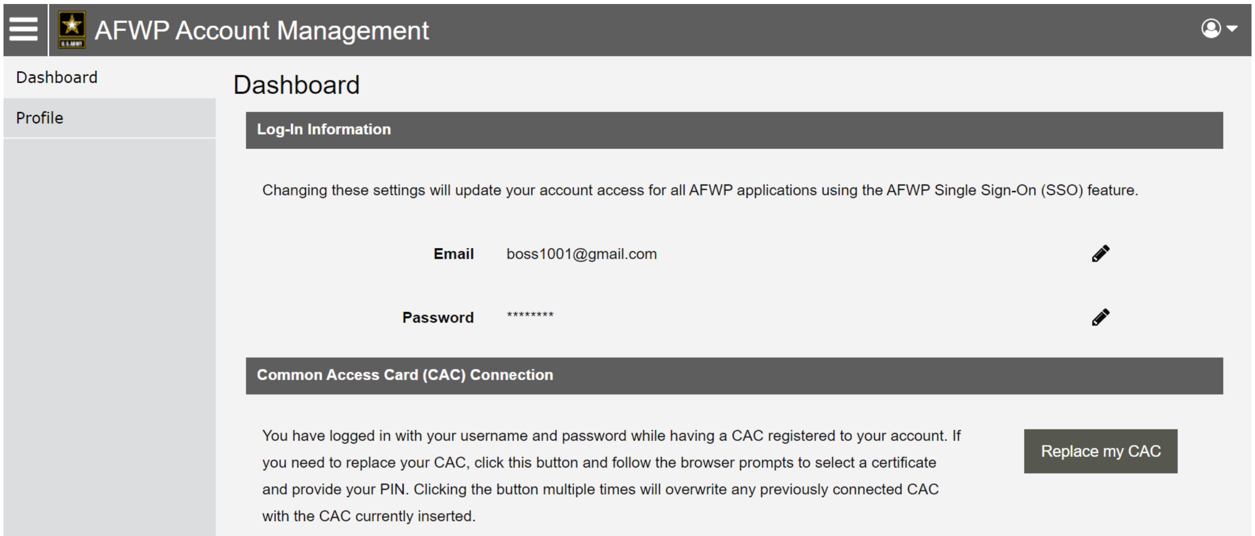
This screenshot shows what should appear when a CAC is successfully added.

1.5.5 - Replace your CAC

Only one CAC can be connected to an account at a time, therefore if you have a new CAC or your CAC needs to be updated, you will need to replace the old CAC with a new one. Keep in mind that a CAC can only be replaced, not removed.

To **replace a CAC**:

1. To replace your CAC - you have to login with your username and password and then connect your replacement CAC
2. Once you login, select “Account Management” from the drop down in the upper right corner.
3. Select Replace my CAC on the AFWP Account Management page to begin the CAC connection process, and refer to section 1.1.1 for things to keep in mind.
4. Follow the prompts that appear.



This screenshot shows what should appear when attempting to replace a CAC.

1.5.6 - Recover Forgotten Password

1. Select **Login** in the upper-right corner of the **ARC Home Page** while logged out.
2. Select **Need to reset your password?** at the bottom of the login page that appears.
3. Enter the **email address** of the AFWP Account that needs to be reset.
4. Select Reset Your Password and a **confirmation email** will be sent to the provided email address.
5. There will be two links in the email, be sure to select the URL for **changing your password**.
6. Navigate to the **unique URL** in the confirmation email to log in to VMIS.
7. Follow the prompts to **create a new password** and complete the recovery.

> ***Note:*** *If you change your password for any reason, you will be logged out of any previously open sessions. You will then have to log back in using your new password.*

1.5.7 - Log Out

1. Select your **user name** on the right side of the toolbar at the top of any page.

2. Select **Log Out** to log out of VMIS and return to the Log In page.

1.6 - Contact the Help Desk

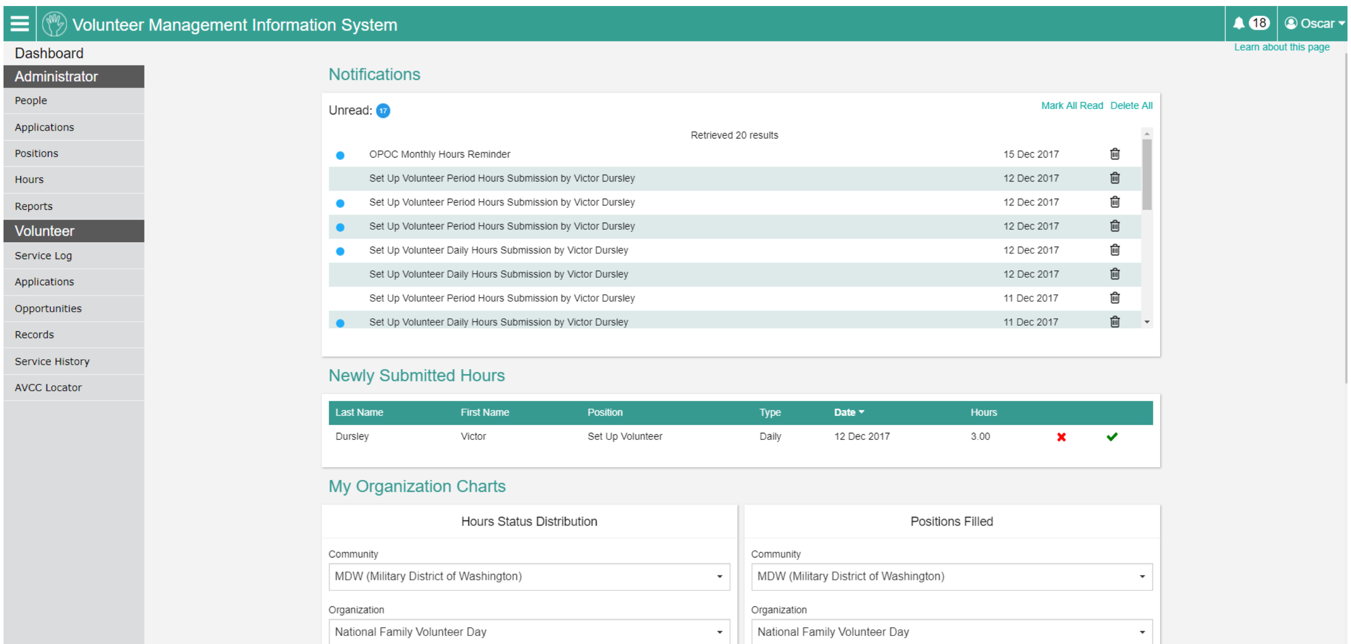
1. Select **FAQ/Help** in the left corner of the footer at the bottom of any page on VMIS.
2. A new tab will open that will direct you to the Army Family Web Portal Resource Center (ARC)
3. Select **Contact the Help Desk** at the bottom of any ARC page.
4. Provide the necessary information in the **following data fields**:
   - *Your Name, Your Email Address, Subject, Category, Message,* and *Attachment.*
5. Select Send Message to complete the submission for review.

> ***Note:*** *Your message will be processed as soon as possible. You may receive direct follow up communication from the help desk via email.*

2.0 - Administrator Dashboard

The **Administrator Dashboard** provides several resources to OPOCs to assist them with their routine responsibilities. These resources include a **Notifications** area related to the volunteers in your organization and to your own volunteering activity, a **Newly Submitted Hours** area to quickly reject or certify volunteer hours, **hour and position status charts** of your organization, a **Log Hours** area, and an **hour chart** of your own volunteer hours.

The Administrator Dashboard can be accessed from any page on VMIS while logged in as an OPOC – simply select **Dashboard** from the left-hand navigation menu.



Administrator Dashboard

2.1 - Notifications Area

Here are some important things to know when checking the Notifications area:

- There are two ways to view your **Notifications** at any time:

  1) Navigate to the **Administrator Dashboard** from the left-hand navigation menu, or

  2) Select the **Notifications bell icon**  on the toolbar at the top of any page.

- The **Notifications area** displays all of your current notifications, such as changes to submitted applications, hours that have been approved, or hours that have been rejected.

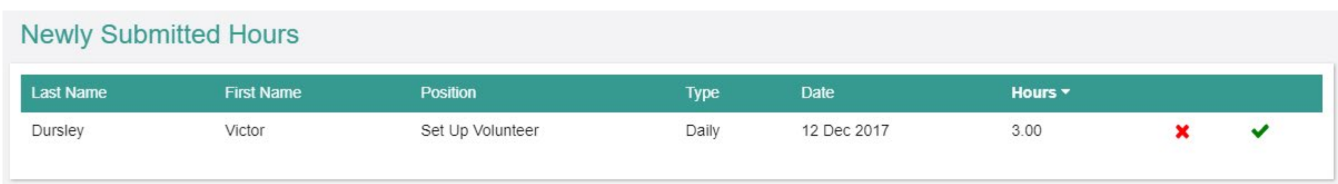
- The number of **unread notifications** appears at the top of the section in a blue circle, and notifications that are unread will have a **blue dot** next to them.
- Selecting a notification will display **additional information** about it, **marking it as read** and removing the blue dot.
- Select **Mark All Read** to mark all notifications as read and remove their blue dots.
- Select **Delete All** to delete all notifications from the Dashboard, or select the **trash can icon** to the right of any notification to delete it individually.

> ***Warning:*** *Once a notification is deleted, it* ***cannot*** *be retrieved.*

2.2 - Newly Submitted Hours

The **Newly Submitted Hours** table displays data when a volunteer within your organization(s) has submitted hours, which can quickly be certified or rejected using the same table.

> ***Note:*** *For information on how to view details about submitted hours, such as notes or documentation, refer to Hours.*


Newly Submitted Hours

Last Name	First Name	Position	Type	Date	Hours		
Dursley	Victor	Set Up Volunteer	Daily	12 Dec 2017	3.00		

Newly Submitted Hours table

> ***Tip:*** *You can sort the list of volunteer hours by clicking any of the column headings in the table.*

2.2.1 - Certify Submitted Hours

1. Select **Dashboard** on the left-hand navigation menu and locate the **Newly Submitted Hours** area.
2. Locate the **row of submitted hours** to be certified.
3. Select the **green check** to the right of the hours.
4. The hours will be **certified** and removed from the table.

> ***Note:*** *Rejecting or certifying hours on the Administrator Dashboard does* ***not*** *allow you to edit the hours, add a reviewer note, or attach documentation. For information on how to do this, refer to Hours.*

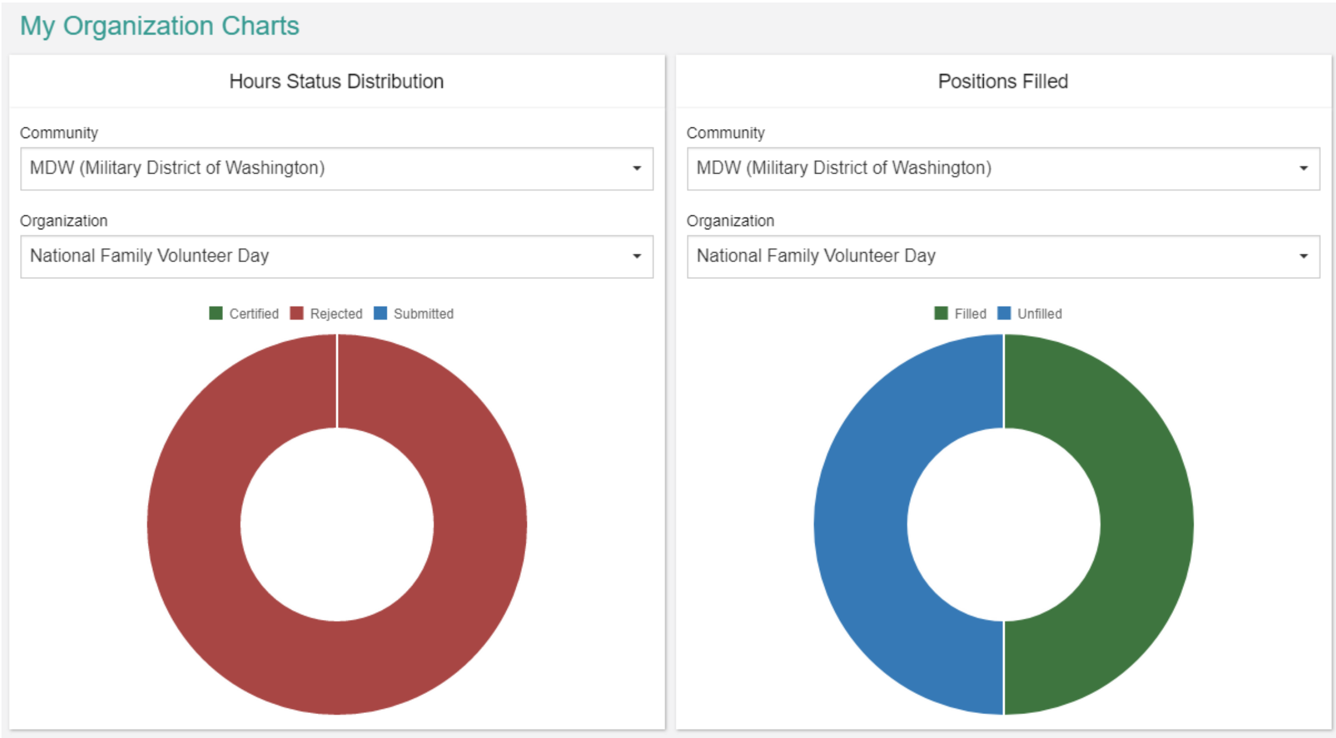
2.2.2 - Reject Submitted Hours

1. Select **Dashboard** on the left-hand navigation menu and locate the **Newly Submitted Hours** area.
2. Locate the **row of submitted hours** to be rejected.
3. Select the **red X** ✖ to the right of the hours. A window with more details will appear.
4. Enter a **Reviewer Note**, which is required when rejecting hours and **will be visible** to the volunteer who submitted the hours.
5. Select Reject at the bottom of the details window.
6. The hours will be **rejected** and removed from the table.

2.3 - My Organization Charts

The **My Organization Charts** area provides summaries of the volunteer hours and positions for each of the OPOC's assigned organizations. Different communities and organizations can be selected to change the information that will populate the charts.

Hover over the different sections of the charts to see the exact numbers of certified, rejected, and submitted hours for the open period, and the exact numbers of filled and unfilled positions.



My Organization Charts

2.3.1 - Hours Status Distribution

1. Select **Dashboard** on the left-hand navigation menu and locate the **My Organization Charts** area.
2. Locate the **Hours Status Distribution** chart.
3. Select the desired **Community** from the Community drop-down list.
4. Select the desired **Organization** from the Organization drop-down list.

> ***Note:*** *The list will contain only organizations for which you are an OPOC.*

5. The chart will display a breakdown of all volunteer hours within the selected community organized by **Certified** (green), **Rejected** (red), and **Submitted** (blue).

2.3.2 - Positions Filled

1. Select **Dashboard** on the left-hand navigation menu and locate the **My Organization Charts** area.
2. Locate the **Positions Filled** chart.

3. Select the desired **Community** from the Community drop-down list.
4. Select the desired **Organization** from the Organization drop-down list.

   > ***Note:*** *The list will contain only organizations for which you are an OPOC.*

5. The chart will display a breakdown of all positions within the selected community organized by **Filled** (green) and **Unfilled** (blue).

   > ***Note:*** *A filled position is one that has at least one active volunteer accepted for it.*

2.4 - My Volunteering

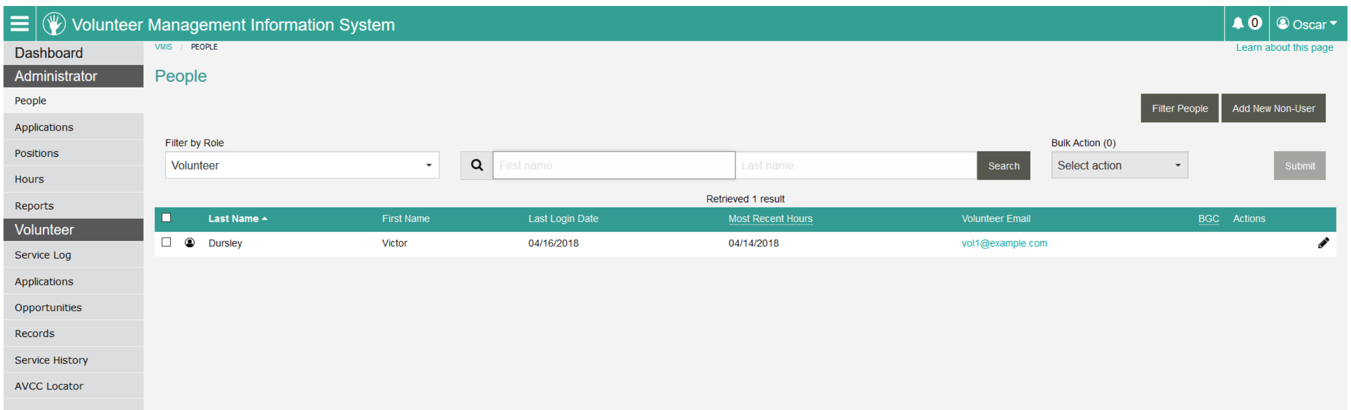
The **My Volunteering** section of the Administrator Dashboard will display information related to any volunteer opportunities in which you participate. This section contains two major features: the **Log Hours** area that can quickly record and update volunteer hours, and an **hour chart** of volunteer hours entered for the given month.

For more information on this section of the dashboard, refer to **My Volunteering** in the **VMIS Volunteer User Guide**.

3.0 - People

The **People** page provides tools for OPOCs to manage and contact people within their organizations. These tools include the ability to view the profiles, service logs, records, and service histories of volunteers, export volunteer lists, and contact volunteers through email.

This page also allows actions to be taken on behalf of volunteers within the organization, such as adding them to positions or logging their volunteer hours. Additionally, this page allows OPOCs to add Non-Users to the community.

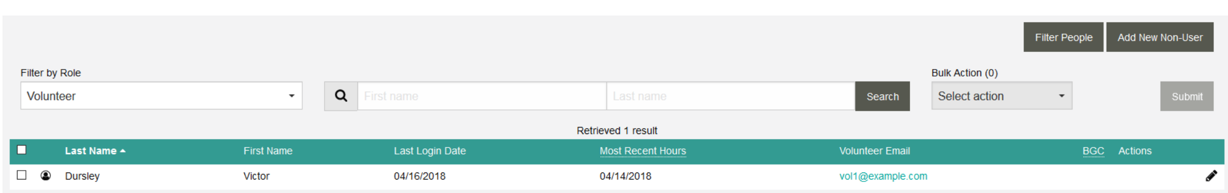


People page

3.1 - People Table

The **People** table provides a list of information related to all volunteers, including their name, last login date, most recent logged hours, and email address. OPOCs are able to filter and search this list, as well as perform other actions on individual volunteers.

Non-Users can also be added to this list. A Non-User is a volunteer who is not directly using VMIS to log their volunteer hours. An OPOC may wish to track this volunteer's hours anyway, for that volunteer's benefit or for the benefit of the organization. Once added, a Non-User can be interacted with in the same way as a normal user. For example, an OPOC could add a Non-User to a position or log their volunteer hours on their behalf.



People table

> ***Tip:*** *A silhouette icon will appear to the left of each volunteer's name –* ***dark icons*** *indicate the volunteer is a normal user, and* ***light icons*** *indicate the volunteer is a Non-User. Hovering over either icon will display this information.*

3.1.1 - Filter and Search for Volunteers

You can manage the People list more easily by using the **Filter** and **Search** tools. Use the following information to learn more about these tools and helpful features:

- **Search** for a volunteer by name by typing the first name, last name, or both into the appropriate search boxes, and then selecting Search.
- To return to the list of all volunteers after performing a search, clear both the *First name* and *Last name* search boxes, then select Search.
- You can sort the list of volunteers by clicking any of the **column headings** in the table.
- Select the **Filter by Role** drop-down to show only people who have the selected role. OPOCs can only view people whose role is "Volunteer".
- To filter even further, select Filter People. Enter any known data into the following fields and then select Filter:
    - *Community, Organization of Activity, Activity, Have Logged in Since,* and *Have Not Logged in Since.*

> ***Tip:*** *You can use the* ***Have logged in since date*** *and* ***Have not logged in since date*** *fields to filter volunteers according to their VMIS activity. This can help identify volunteers who may need to be contacted to confirm their participation in the AVC program.*

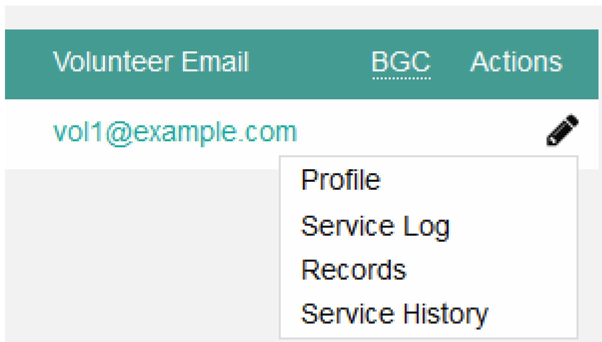
- To **clear** your filters, select Filter People and then select Clear.

> ***Note:*** *On top of the Volunteer table you will see a checkbox that is selected by default that reads* ***"Show only volunteers who have submitted an application." DO NOT unselect this checkbox.*** *Leave it selected. This will ensure that VMIS will only show you users who have ever submitted an application in VMIS (regardless of what community or organization for which the application was submitted). This checkbox will not apply to Non-Users as they will always be shown in this view. This checkbox will only show when you are searching for volunteers.*

3.2 - Actions Menu

The **Actions Menu** found on the People page allows you to view additional volunteer information or take action on their behalf. The Action menu is accessed by selecting the **pencil icon** to the right of any listed volunteer.

For detailed information about the features available to Volunteers within each of these sections, refer to the **VMIS Volunteer User Guide**.



3.2.1 - Profile

The **Profile** section of the Actions Menu refers to the **AFWP Profile** of the selected Volunteer.

Make any desired modifications to the profile's following fields and then select Save:

- *Name, Date of Birth, Military Community, Branch, Component, Disposition(s), Preferred Contact Method, Volunteer Email, Primary Phone, Secondary Phone (optional), Work Experience (optional), Volunteer Experience (optional),* and *Special Skills, Interests, and Hobbies (optional).*

3.2.2 - Service Log

The **Service Log** is a calendar view of the volunteer's hours. OPOCs can use this view to submit and certify hours on the volunteer's behalf, as well as reject or certify hours that were previously submitted by the OPOC or volunteer.

- Entries will appear according to the **selected month**, **Service Status**, and **Position**.
- Hours can be logged for individual days, and **period hours** can be logged for a selected month. It is strongly recommended that all volunteers log hours on a **daily basis**.
- Up to three **attachments** can be included with a daily hour entry.

- **Notes** are required for any hours that are rejected by the OPOC, and they can also be added optionally to any certified or submitted hours.
- OPOCs can **add a position** to any volunteer by selecting Add to Position. Select a *Community, Organization,* and *Position* from the drop-downs, and select Add to Position.
- Once a position is added to a volunteer's profile, hours for that position can be logged.

3.2.3 - Records

6. Select **Records** from the Actions Menu.
7. Select Add Award to add an award for the selected volunteer.
8. Select Add Training to add training for the selected volunteer.
9. Select Add Orientation to add an orientation for the selected volunteer.
10. Select Add Note to add a note for the selected volunteer. Fill out the **Note** text field, and then select Save.

> ***Note:*** *Volunteers will* ***not*** *be able to see this note. It will be viewable only by an OPOC or AVCC with access to the volunteer's information.*

11. Select Add Background Check to add a background check for the selected volunteer. Fill out information in the *Date Checked, Valid Until,* and *Comment (optional)* data fields. Then select Save.

> ***Note:*** *A background check should only be added once a volunteer has completed it. For this reason, the Date Checked cannot be set to a future date.*

12. Select Add Documents to add a document for the selected volunteer.
13. To edit or certify any record, select the **pencil icon** to the right of that record. You can edit the information for that record, including whether or not it is certified, and select Save. You can select Delete to delete that record.

3.2.4 - Service History

14. Select **Service History** from the Actions Menu.
15. Select the **pencil icon** to the right of any position to edit the status of that individual position for the selected volunteer. Select a status from the **Service Status** drop-down, then select Save.

16. Select `Download DA 4713` and select a year to download a PDF of the volunteer's **Volunteer Daily Time Record**, which shows their volunteering hours for each day that calendar year.
17. Select `Download DA 4162` to download a PDF of the volunteer's **Volunteer Service Record**. This record contains information about their qualifications, volunteer positions, trainings, and awards. Specifically, this form contains the volunteer's 7 most recent:
    - *Certified awards*
    - *Certified trainings*
    - *Positions, determined by the most recent date of certified hours.*

3.2.5 - Convert to Normal User

> ***Note:*** *You can perform this action only on non-users.*

1. Select **Convert to Normal User** from the Actions Menu.
2. Update the **Email** of the non-user if necessary.

> ***Note:*** *You cannot use an email address that already exists within AFWP.*

3. Select `OK` on the **Confirm Conversion to Normal User** window.
4. The non-user will receive an **email** with a temporary password and instructions for logging in to VMIS. The non-user will now appear as a **normal user** in the People table.

3.3 - Export a List of Volunteers

Lists of volunteers can be **exported** from the People table into a **CSV file** containing information about the exported profiles. To export a list of volunteers:

1. Select **People** on the left-hand navigation menu of any VMIS page.
2. **Search** or **filter** the list to find the volunteers being exported.
3. Select the **checkbox** to the left of each volunteer being exported.

> ***Tip:*** *The checkbox in the top left corner of the table will select or unselect **all** volunteers currently listed on the table.*

4. Using the **Bulk Action** dropdown, select **Export** and then select `Submit`.

5. Open the **CSV file** once it finishes downloading using Excel or another spreadsheet editor. It will contain the following information:

    - *First Name, Last Name, Last Login Date, Most Recent Hours,* and *Email.*

3.4 - Email Volunteers

1. Select **People** on the left-hand navigation menu of any VMIS page.
2. Select the **checkbox** to the left of each volunteer to include in the email.

    > ***Tip:*** *The checkbox in the top left corner of the table will select or unselect* ***all*** *volunteers currently listed on the table.*

3. Using the **Bulk Action** dropdown**,** select **Mass Email** and then select Submit.
4. Enter the necessary information into the **Subject** and **Message** data fields.
5. Select Send when the email is complete.

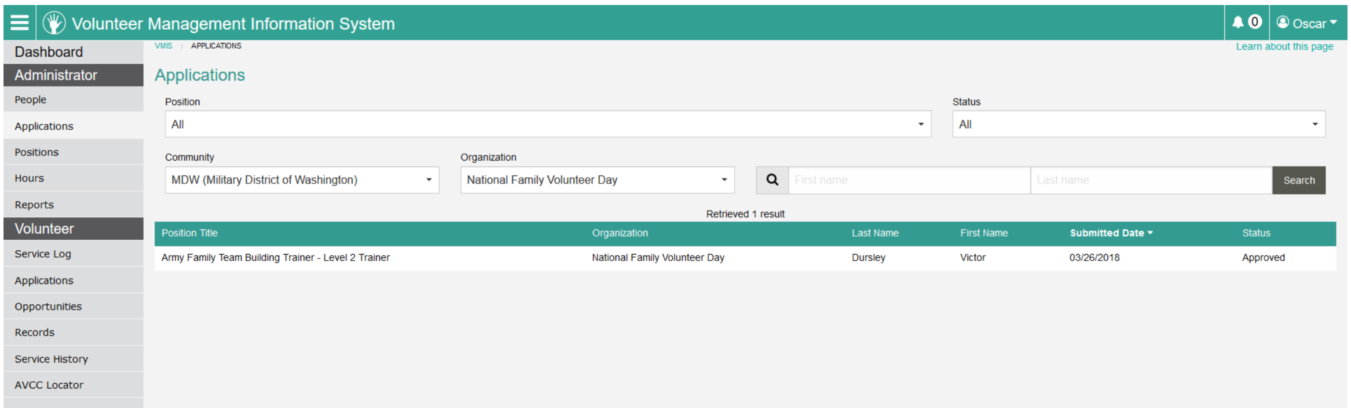
3.5 - Add a New Non-User

1. Select **People** on the left-hand navigation menu of any VMIS page.
2. Select Add New Non-User and the **Add New Non-User** window will appear.
3. Enter the user's **email address**, then select Continue.
4. Enter the **personal information** in the following data fields and then select Continue:
    - *First Name, Middle Initial (optional), Last Name, Date of Birth,* and *Military Community.*
5. Enter the **demographic information** in the following data fields and then select Continue:
    - *Branch, Component,* and *Disposition(s).*
6. Enter the **contact information** in the following data fields and then select Continue:
    - *Preferred Contact Method, Volunteer Email, Primary Phone,* and *Secondary Phone (optional).*
7. Fill out the **background information** in the following data fields and then select Continue:
    - *Work Experience (optional), Volunteer Experience (optional),* and *Special Skills, Interests, and Hobbies (optional).*
8. Select OK and the Non-User will be added.

Warning: *Non-users with volunteer hours in the system will be visible to all OPOCs. OPOCs will have limited access to the non-user's account unless the non-user has activity in the OPOC's organization(s).*

4.0 - Applications

The **Applications** page displays the applications that are managed by the OPOC. Applications can be **approved** or **declined** from this view, and specific volunteers and applications can be managed using the Applications page's filter and search tools.



Applications page

4.1 - Filter Applications and Search for Volunteers

1. Select **Applications** on the left-hand navigation menu of any VMIS page.
2. Select a **position** from the Position drop-down, or select **All** to view applications for all managed positions.
3. Select a **status** from the Status drop-down, or select **All** to view all applications regardless of status.
4. To look at applications submitted by a specific volunteer, enter the volunteer's **first name**, **last name**, or **both** into the appropriate search boxes, then select Search.

> ***Tip:*** *To return to the list of all applications after searching by name, clear both the* First name *and* Last name *search boxes, then select* Search.

5. Select a **community** from the Community drop-down.
6. Select an **organization** from the Organization drop-down.

> ***Tip:*** *You can sort the list of applications by selecting any of the column headings in the table.*

4.2 - Approve Applications

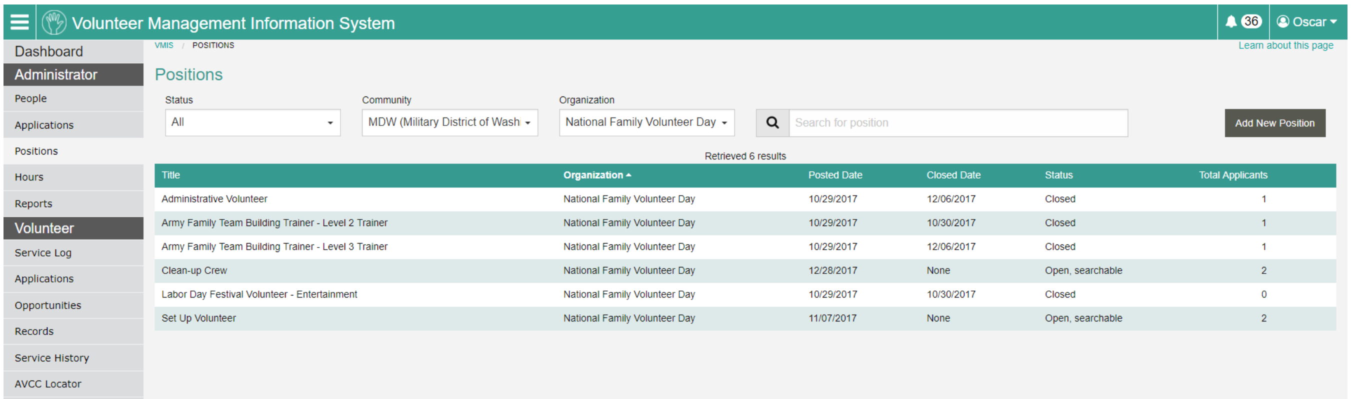
1. Select **Applications** on the left-hand navigation menu of any VMIS page.
2. Select the **row** of the application to be approved.
3. Select Approve and a **confirmation window** will appear.
4. Select Approve again to finalize the approved application.

4.3 - Decline Applications

1. Select **Applications** on the left-hand navigation menu of any VMIS page.
2. Select the **row** of the application to be declined.
3. Select Decline and a **confirmation window** will appear.
4. Enter a **Reason** for declining the application. Providing a reason is **required** and will be **visible to the volunteer**.
5. Select Decline again to finalize the declined application.

5.0 - Positions

The **Positions** page provides details about each of the positions managed by the OPOC. From this page, managed positions can be created, edited, filtered, and deleted.



Positions page

5.1 - Filter and Search for Positions

1. Select **Positions** on the left-hand navigation menu of any VMIS page.
2. Select a **status** from the Status drop-down, or select **All** to view all positions regardless of status.

> ***Note:*** *The following statuses can be selected from the Status drop-down:*
>
> ***Open, searchable*** *denotes positions that are accepting volunteers and that will appear in search results on a volunteer's Opportunities page.*
>
> ***Open, not searchable*** *denotes positions that have active volunteers, but that will not appear in search results on a volunteer's Opportunities page. For example, a position that has reached the maximum number of volunteers and should be unavailable to new volunteers would likely be Open, not searchable.*
>
> ***Closed*** *denotes positions that do not have active volunteers and will not appear in search results on a volunteer's Opportunities page.*

3. Select a **community** from the Community drop-down.
4. Select an **organization** from the Organization drop-down.
5. Type any part of a **position title** in the search field to find a specific position.

> ***Note:*** *The table will only filter on the data already loaded into it. To search in all Positions, select "Load All Results" at the bottom of the page before searching by title.*

> ***Tip:*** *You can sort the list of positions by selecting any of the column headings in the table.*

5.2 - Add a New Position

1. Select **Positions** on the left-hand navigation menu of any VMIS page.
2. Select Add New Position.
3. Enter information in the following **data fields**:

   - *Community, Organization, Title, Closed Date (optional), Keywords (optional), Position Type, Opportunity Type, Status, Background Check Required, Supervision Required, Summary (optional), Duties, Qualifications, Training, Orientation, Time Required, Evaluation (optional), Benefits (optional), Country, Street Address, City, State, Zip/Postal Code, Supervisor 1 Name (optional), Supervisor 1 Email (optional), Supervisor 1 Phone (optional), Supervisor 2 Name (optional), Supervisor 2 Email (optional),* and *Supervisor 2 Phone (optional).*

> ***Note:*** *If you specify a Closed Date, the position will be closed at 12:00 am on the morning of that date. If you choose today as the Closed Date, the position will be automatically closed once it is created. Once the closed date has passed, the service status for volunteers in this position will be set to* Finished, *and the volunteers will no longer be able to log hours to it. You may update the Closed Date for a position at any time.*

4. Select Save to create the position.

> ***Tip:*** *To create multiple positions with similar information (for example, if you are creating multiple positions for the same event), refer to* ***Clone a Position*** *for information on duplicating existing positions.*

5.3 - Edit a Position

1. Select **Positions** on the left-hand navigation menu of any VMIS page.
2. Select the desired **position** from the list.

> ***Note:*** *You can edit only* ***open positions****.*

3. Edit the desired information in the following **data fields**:

- *Community, Organization, Title, Closed Date (optional), Keywords (optional), Position Type, Opportunity Type, Status, Background Check Required, Supervision Required, Summary (optional), Duties, Qualifications, Training, Orientation, Time Required, Evaluation (optional), Benefits (optional), Country, Street Address, City, State, Zip/Postal Code, Supervisor 1 Name (optional), Supervisor 1 Email (optional), Supervisor 1 Phone (optional), Supervisor 2 Name (optional), Supervisor 2 Email (optional),* and *Supervisor 2 Phone (optional).*

> ***Note:*** *You will not be able to edit certain fields if hours are associated with the position. Additionally, if you specify a Closed Date, the position will be closed at 12:00 am on the morning of that date. If you choose today as the Closed Date, the position will be automatically closed once you save and confirm your edits. Once the closed date has passed, the service status for volunteers in this position will be set to* Finished, *and the volunteers will no longer be able to log hours to it. You may update the Closed Date for a position at any time.*

4. Select Save and a confirmation window will appear.
5. Select Confirm to confirm the edits.

5.4 - Delete a Position

1. Select **Positions** on the left-hand navigation menu of any VMIS page.
2. Select the desired **position** from the list.

> ***Note:*** *You can delete only positions that have no hours associated with them.*

3. Select Delete and a confirmation window will appear.
4. Select Confirm to confirm the deletion.

5.5 - Clone a Position

1. Select **Positions** on the left-hand navigation menu of any VMIS page.
2. Select the desired **position** from the list.
3. Select **Clone**.
4. Add or modify the desired information in the following **data fields**:

- *Community, Organization, Title, Closed Date (optional), Keywords (optional), Position Type, Opportunity Type, Status, Background Check Required, Supervision Required, Summary (optional), Duties, Qualifications, Training, Orientation, Time Required,* *Evaluation (optional), Benefits (optional), Country, Street Address, City, State, Zip/Postal Code, Supervisor 1 Name (optional), Supervisor 1 Email (optional), Supervisor 1 Phone (optional), Supervisor 2 Name (optional), Supervisor 2 Email (optional),* and *Supervisor 2 Phone (optional).*

> ***Note:*** *If you specify a Closed Date, the position will be closed at 12:00 am on the morning of that date. If you choose today as the Closed Date, the position will be automatically closed once it is created. Once the closed date has passed, the service status for volunteers in this position will be set to* Finished, *and the volunteers will no longer be able to log hours to it. You may update the Closed Date for a position at any time.*

5. Select Save to save the cloned position.

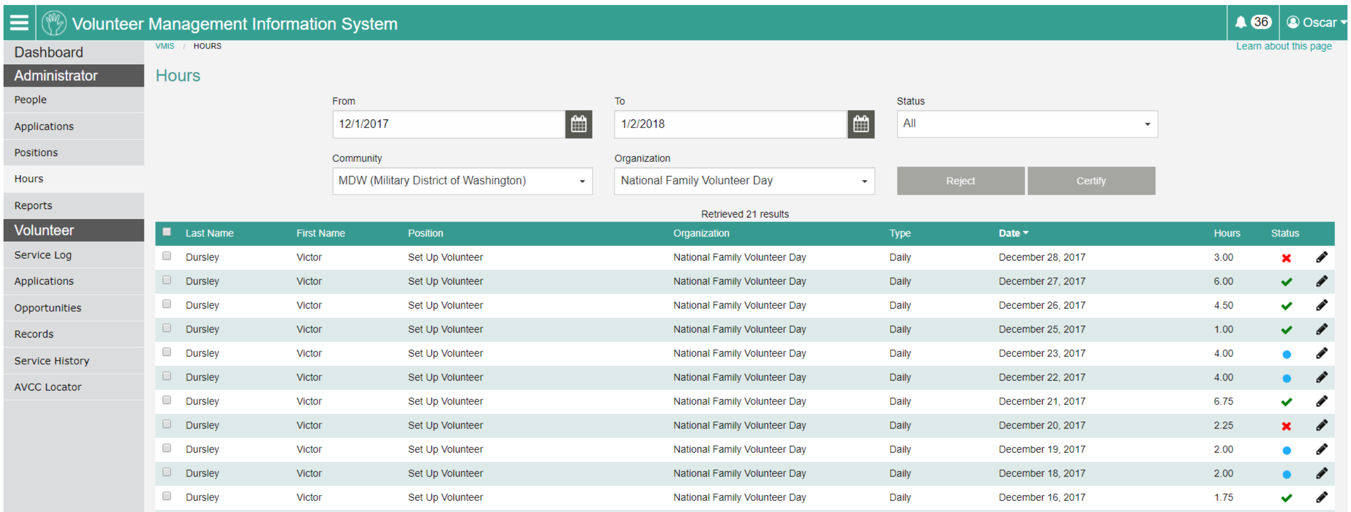
5.6 - Print a Position

1. Select **Positions** on the left-hand navigation menu of any VMIS page.
2. Select a **position** from the list of positions.
3. Select **Print**.
4. A browser window will appear with the position details. **Right-click** anywhere inside the browser window.
5. Select **Print** and follow the prompts to complete the print operation.

6.0 - Hours

The **Hours** page displays all of the hours recorded by volunteers within a particular community and organization. Volunteer hours can be **rejected** or **certified** on this page, either individually or in bulk, as well as **edited** or **deleted**.

Additionally, more information related to hour entries can be viewed here, such as **submitter notes** and any **attached documentation**.



Hours page

6.1 - Filter Hours

1. Select **Hours** on the left-hand navigation menu of any VMIS page.

2. Select the **calendar icon** inside the **From** field to choose a date to define the beginning of the desired date range.

3. Select the **calendar icon** in the **To** field to choose a date to define the end of the date range of hours to display.

> ***Note:*** *The date range will default to the past month. If today is before or on the 15th of the month, the* From *date will default to the 1st of the previous month; if today is after the 15th of the month, the* From *date will default to the 1st of the current month. The* To *date will always default to today's date.*

4. Select a **status** from the Status drop-down, or select **All** to view all hours regardless of status.

Note: *A status of Submitted is selected by default.*

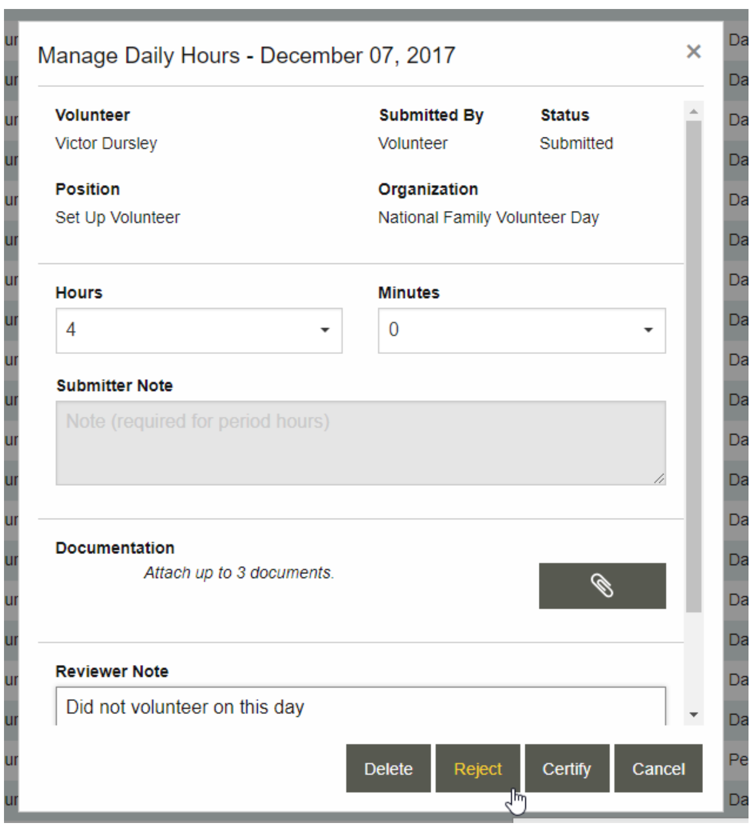
5. Select a **community** from the Community drop-down.
6. Select an **organization** from the Organization drop-down.

6.2 - Certify, Reject, and Delete Hours

Hours can be **rejected individually or in bulk** after they are submitted by a volunteer. Rejected hours appear on the volunteer's service log but will not count towards their total certified hours. Similarly, hours can be **certified individually or in bulk** after they are submitted by a volunteer and will count towards the total certified hours.

Submitted hours can also be deleted by an OPOC, but **hours cannot be deleted in bulk** and will not appear on the volunteer's service log after deletion.

Note: *When rejecting or deleting hours, it is* ***required to include a reviewer note*** *detailing why the selected hours were rejected or deleted. These notes are optional when certifying hours, and* ***volunteers will be able to see any of these included notes****.*



Dialog box to delete, reject, or certify hours

6.2.1 - Reject Individual Hours

1. Select **Hours** on the left-hand navigation menu of any VMIS page.
2. Select the **pencil icon** next to the hours to be rejected.
3. Attach **documentation** if needed by selecting the paperclip button .

> ***Note:*** *Up to* ***three documents*** *can be attached to a single instance of hours. Once the hours are certified, these documents will automatically be removed. They are intended as a reference during review but will not be retained once that review is complete.*

4. Add a **reviewer note** in the Reviewer Note field.
5. Select Reject.

6.2.2 - Reject Hours in Bulk

1. Select **Hours** on the left-hand navigation menu of any VMIS page.
2. Select the checkbox next to each row corresponding to the hours to be rejected.
3. Select Reject.
4. Add a **reviewer note** in the Reviewer Note field.
5. Select Reject.

> ***Note:*** *You can reject only hours with a status of* ***Submitted*** *or* ***Certified****.*

6.2.3 - Certify Individual Hours

1. Select **Hours** on the left-hand navigation menu of any VMIS page.
2. Select the **pencil icon** next to the hours to be certified.
3. **Edit** the hours if needed using the Hours and Minutes drop-downs.
4. Add a **reviewer note** in the Reviewer Note field if needed.
5. Select Certify.

6.2.4 - Certify Hours in Bulk

1. Select **Hours** on the left-hand navigation menu of any VMIS page.
2. Select the checkbox next to each row corresponding to the hours to be certified.
3. Select Certify.

4. Add a **reviewer note** in the Reviewer Note field if needed.
5. Select Certify.

> ***Note:*** *You can certify only hours with a status of **Submitted** or **Rejected**.*

6.2.5 - Delete Hours

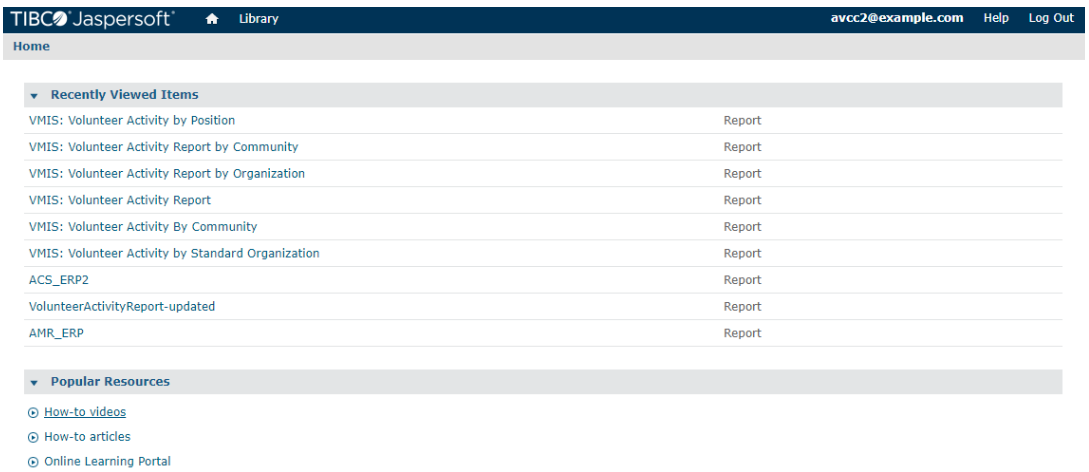
1. Select **Hours** on the left-hand navigation menu of any VMIS page.
2. Select the **pencil icon** next to the hours to be deleted.
3. Add a **reviewer note** in the Reviewer Note field.
4. Select Delete.
5. Select Delete in the dialog box that pops up.

> ***Note:*** *You can delete hours with a status of **Submitted**, **Rejected**, or **Certified**. Once you delete hours, this action **cannot be undone**.*

7.0 - Reports

The **Reports module** of VMIS allows users to run reports about volunteers, organizations, and other related information stored in VMIS. It can be accessed by AVCCs and OPOCs at any time by selecting **Reports** from the left-hand navigation menu on any VMIS page.

***Note:** Users must be **logged in to VMIS** to access the Reports module.*



Reports Home Page

7.1 - Reports Home Page

The **Reports Home Page** features several useful resources:

- The **Recently Viewed Items** area displays the most recently accessed reports by the logged-in user.
- **Popular Resources** provides quick access to frequently requested resources related to reports.
- The **home icon** in the top banner of Reports will direct the user back to the Reports Home Page.
- The **Library tab** in the top banner of Reports will direct to a list of all Reports that can be accessed by the logged-in user.
- The **Help tab** in the top banner of Reports will direct to site documentation and troubleshooting resources specifically for the Reports module.
- The **Log Out** option in the top banner of Reports will log the current user out of their current session, which will **also log out any other AFWP web applications**.

7.2 - Library Tab

The **Library tab** is available in the Reporting module and provides a list of reports created with specific filters and saved for repeated use. Other functions of the Library tab include the ability to **sort reports by Name or Modified Date**, **filter reports by name**, and **view saved report filters**.

7.2.1 - Types of Reports

Within the Library tab, there are several **pre-configured reports** available that provide specific filters for VMIS reporting purposes. These report types include:

- *VMIS: Volunteer Award Report by Community*
- *VMIS: Volunteer Award Report by Organization*

> ***Note:*** *To locate or run any of these listed reports, select the* ***Library*** *tab in the top banner of the Reporting module, and then select the correct report from the list that appears.*

7.2.2 - Run a Report

1. Select **Reports** from the left-hand navigation menu on any VMIS page.
2. Select **Library** from the top of the **Reports Home Page**.
3. Select the **name of the report** to run from the list that appears.
4. **Enter or modify** the necessary information in the left-hand Options column.

   > ***Tip:*** *Use the* ***Select All***, ***Deselect All***, *and* ***Invert*** *options to easily select large lists of communities or other filters that require multiple entries.* ***Optional data fields left blank*** *will be treated as if all options for that data field are selected.*
   >
   > *Currently selected items can be viewed separately by selecting the* ***Selected tab*** *above the list of entries.*

5. Select Apply to run the report after the correct criteria is selected.
6. To **save the report as a file**, select the **Export icon** above the report results and select the **desired file type** from the drop-down list that appears.

   > ***Note:*** *Reports can be saved to the* ***following file types***: *PDF, Excel (Paginated), Excel, CSV, DOCX, RTF, ODT, ODS, XLSX (Paginated), XLSX, and PPTX.*

7.2.3 - Save a Report Filter

Users can **save and name custom report filters** that will appear within the Library tab. These customized reports are displayed by selecting the **arrow icon** ► to the left of the parent report's name.

To save a custom filter as a new report:

1. Select **Reports** from the left-hand navigation menu on any VMIS page.
2. Select **Library** from the top of the **Reports Home Page**.
3. Select an **existing report** from the list that appears that is **most similar** to the new report.

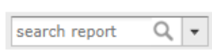
> ***Note:*** *The filters available in the Options column will* ***vary by the report selected****. For this reason, it is necessary to select and modify a report containing the same filters as the new report being created.*

4. **Add or modify** the required criteria for the new report in the left-hand **Options** column.
5. Select **Save** at the bottom of the left-hand Options column to save the current report criteria as a new report.
6. Enter a **name** for the report being created.
7. The **new report** will now appear beneath whichever report was selected in Step 3.

> ***Note:*** *Select the* ***arrow icon*** ► *to the left of the parent report to display all nested reports.*

7.2.4 - Search a Report

To search the contents of any report for particular keywords or other information:

1. **Select and run** the desired report (see **Section 10.2.2 – Run a Report**).
2. Select the **report search box**  at the top of the report results area.
3. Enter the **keywords to search** and any instances of that keyword will become highlighted in the report results.
4. Select the **left and right arrow icons** ◄ ► next to the search box to navigate the results if more than one instance of the keyword is found.