

## Volunteer Group Leader Group Management Process

1. Once you select your group. Three options will appear.

Actions	Group Name [Group ID]	Member Count	Date Created
Select	Morning Group [33]	1	2/6/2017
Select	My Group [32]	2	2/6/2017

You have selected **My Group [32]**. What would you like to do?

[View Group Details](#) [Suggest Applications](#) [Manage Opportunity Sign-Ups](#)

**Step 1: View Group Details:** This section shows the group members and allows the Volunteer Group Leader (VGL) to add new members. There are two options for adding members to a group:

1. Send a personal email to potential group members to have their OWN ACCOUNT. These people will be added to your group but can also sign up for their own activities outside of the group.
2. Add group members that WILL NOT have their own accounts. You will control which shifts they sign up for. These are called Managed Users.

*If you choose Option 1:*

- Click **View Group Details** → **Add Group Member** → a pop-up will appear with a link to copy and paste in an email to invite potential group members. Once they make their accounts, they will automatically be added to your group.

**Group Details for My Group**

[+ Add Group Member](#)

**Account User**

**Gus Egyll** ☆  
gusegyllav-4929@yopmail.com  
P: 414-257-9400

**Add Group Member**

Managed Users are group members for whom you, as the Group Leader, will be responsible. Managed Users will NOT have their own login and password to the Volunteer Portal. You may need to submit applications on their behalf, or they may have to complete a paper application when they arrive for the opportunity. You will also have to sign up Managed Users for the opportunity in which your group will participate. If you would like to be responsible for a particular volunteer, click Add Managed User.

If you would prefer that this group member be responsible for their own Volunteer Portal account and complete their own online application, copy the link below. Paste the link into an email to your volunteers. When the volunteer clicks the link, it will direct them to the Portal's account creation screen. When the volunteer creates their account, they will automatically be a member of your group.

**Copy and Share Group Invitation Link**  [Copy](#)

[Cancel](#) [+ Add Managed User](#)

[Select](#)

If you choose Option 2:

- Click **View Group Details** → **Add Group Member** → **Add Managed User**

Group Details for My Group

+ Add Group Member

Account User

Gus Egyll ☆  
gusegyllav-4929@yopmail.com  
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Add Group Member

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Copy and Share Group Invitation Link <https://goo.gl/8wbsG>

Cancel + Add Managed User

Select

- Enter Member's information. You can either use their own phone, email, and address OR choose Use My Email, Use My Phone, etc. → **Submit and Add Another** OR **Submit and Complete**

Managed Participant

This person is my... --Not Specified--

Email Email (Required) Use my email

If this participant does not have an email address of their own, enter your email address.

First Name First Name (Required)

Last Name Last Name (Required)

Current Address Address (Required) Use my address

**(ONLY USE THIS STEP IF YOU CHOSE OPTION 1 IN STEP 1, IF NOT, SKIP TO STEP 3)**

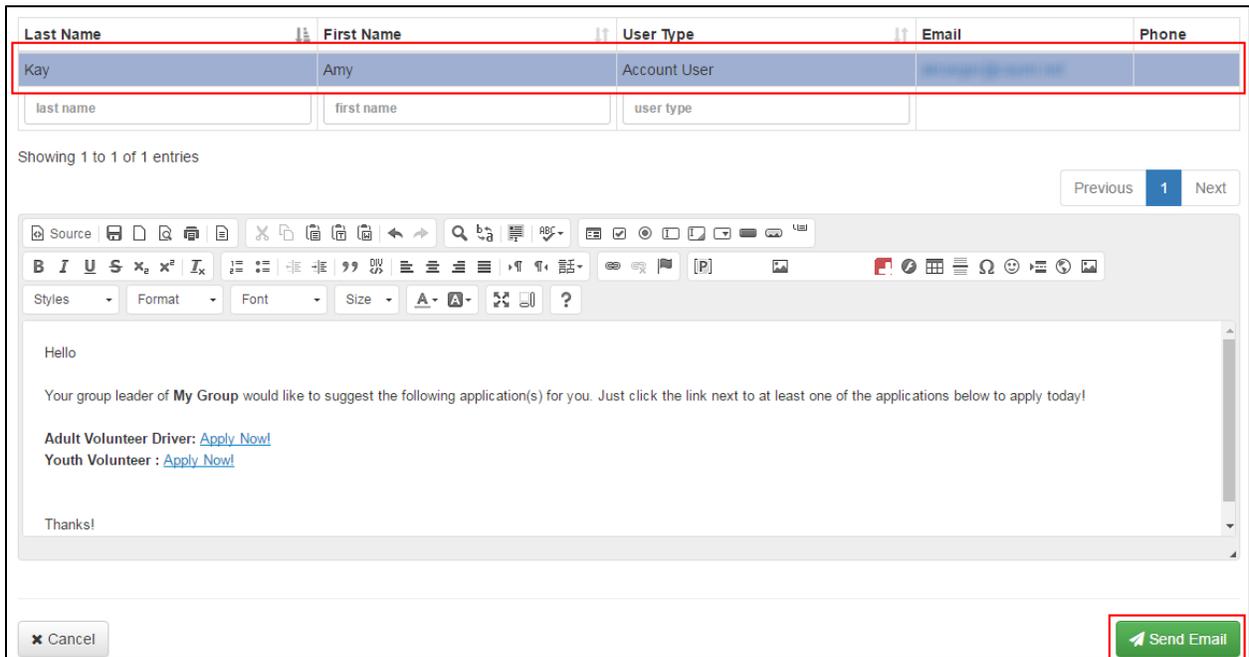
**Step 2: Suggest Applications:** This section allows the VGL to specify which application(s) those group members should complete in the Portal. It is recommended that the suggested applications are selected before inviting people to make their own Portal accounts – in this way the volunteer can make the account and complete the application in their first visit to the Portal.



Select applications to suggest

Adult Volunteer Driver X Youth Volunteer X

The VGL can also send emails to selected group members inviting them to complete the suggested application.



Last Name	First Name	User Type	Email	Phone
Kay	Amy	Account User	[redacted]	[redacted]

Showing 1 to 1 of 1 entries

Previous 1 Next

Source [redacted]

Styles Format Font Size [redacted]

Hello

Your group leader of My Group would like to suggest the following application(s) for you. Just click the link next to at least one of the applications below to apply today!

Adult Volunteer Driver: [Apply Now!](#)

Youth Volunteer: [Apply Now!](#)

Thanks!

Cancel Send Email

**Step 3: Manage Opportunity Sign-Ups:** Here the VGL can:

1. Sign members of their group up for any dates being held for their group. (You will need to contact the agency Volunteer Coordinator to place a hold on an opportunity for your group).
2. Send an invitation email to group members that will allow them to click “Yes, I’ll be there” or “No I can’t make it.” The VGL can also see which members have accepted the invitation and which have declined.

**Manage Opportunity Sign-Ups** You may Sign Up Group members or send them invitations to Sign Up for Opportunities being held for your Group. Opportunity Holds are specific dates/times in which a Group has arranged to participate in a(n) Opportunity. You will need to work with the agency Coordinator to put a hold on a specific Opportunity and Date.

Actions	Opportunity Name	Opportunity Date
<a href="#">Sign Up / Invite</a>	Meal Program - Thursday Servers	2/15/2017

*If you choose Option 1:*

- Click **Sign Up/Invite** next to the opportunity and date. The screen will expand and show your group members at the bottom.
- Highlight by clicking on the last names of those that should be signed up to participate that day.
- Click **Sign Up/Invite Group Members**. The names of those highlighted will appear in grey boxes.
- Click **Sign Up Selected**. The screen will expand and allow you to customize a confirmation email.

Action	Last Name	First Name	User Type	Email	Phone
	Egyll	Don	Managed User		414-257-9400
	Kay	Amy	Account User		

Showing 1 to 2 of 2 entries

[Sign up / Invite Group Members](#)

**Current Selected members** (Note: To remove, click on each of the name labels below.)

[Don Egyll](#) [Amy Kay](#)

[Sign Up Selected](#) [Invite to Sign Up](#)

- To finalize the sign up, click **Send Message**.

If you choose Option 2:

- Click **Sign Up/Invite** next to the opportunity and date. The screen will expand and show your group members at the bottom.
- Highlight by clicking on the last names of those that should be signed up to participate that day.
- Click **Sign Up/Invite Group Members**. The names of those highlighted will appear in grey boxes.
- Click **Invite to Sign Up**. The screen will expand and allow you to customize a confirmation email. Note that the links to accept or decline this invitation do not appear in the preview but will appear below the message once the email is sent.

Action	Last Name	First Name	User Type	Email	Phone
	Egyll	Don	Managed User	<a href="#">[Redacted]</a>	414-257-9400
	Kay	Amy	Account User	<a href="#">[Redacted]</a>	

Showing 1 to 2 of 2 entries

Previous 1 Next

**Sign up / Invite Group Members**

**Current Selected members** (Note: To remove, click on each of the name labels below.)

Don Egyll Amy Kay

Sign Up Selected Invite to Sign Up

- To finalize the invitation, click **Send Message**.

**NOTE:** When Signing Up or Inviting Group Members, you may see the following message:

This Opportunity [requires a completed application](#) for all participants. Group Members will need to complete an application either online or in person prior to participating in the Opportunity.

You will be able to Sign Up and Invite group members even if they have not completed the required application for this opportunity. Group Members will need to complete an application either online or in person prior to participating in the Opportunity.