VRMS Training

**This content is excerpted from the Volunteer Registration and Management System Administrators’ Training Guide and Resources (“VRMS Guide”). Some of the links are to pages within the “VRMS Guide” which can be found in its entirety in Better Impact’s Enterprise Document Library (currently under revision). If you are a Volunteer Coordinator and cannot perform some of these functions, your Dept Admin can assist you.**

Better Impact (BI) Account Set-Up

To increase your success using the Better Impact system, planning is key. It is important to take the time to consider how your department is structured and how you would like it to be presented in the Better Impact system.

*You might consider the following:*

* *The type of programs/events you offer*
* *The specific types of tasks/roles that would be required to fulfill the needs of the programs/events*
* *Prerequisites to perform, or be assigned, to a particular task or role.*
* *Type of information needed to pre-screen the majority of your applicants*
* *The kind of data/reporting you will need about your programs/volunteer types*

*Throughout the following pages, you will find step-by-step instructions, or directions/links to resources necessary for setting up your Better Impact account and associated functions. These are presented in a specific order to* assist you in getting your account up and running as quickly as possible.

**READ ALL THE INSTRUCTIONS IN THIS GUIDE BEFORE PROCEEDING IN BETTER IMPACT**

***Login as an Administrator to Better Impact:*** Access at <http://admin.volunteer2.com>

1. Identify Department Administrators and/or Volunteer Coordinators
   1. Contact the Enterprise Administrator at [ucvolunt@ucalgary.ca](mailto:ucvolunt@ucalgary.ca) to add additional Dept Admins and Volunteer Coordinators to the Better Impact account. Include with your request a signed *Oath of Confidentiality* for all Dept Admins and Volunteer Coordinators (VC) – (form is available on the Enterprise Document Library). Administrators/coordinators will not be added to the Better Impact account without an accompanying signed Oath of Confidentiality. (Please refer to the email sent with your temporary login information for the process during COVID-19 work-from-home periods)
   2. Arrange for all Department Admins/Volunteer Coordinators to take [*Volunteer Coordinator OHS Orientation*](https://learning.my.ucalgary.ca/psp/lmprd/EMPLOYEE/ELM/c/LM_SS_LEARNING.LM_LEARNING_ITEMS.GBL?Page=LM_SS_ITM_DTL&amp;LM_CI_ID=1327)training in Enterprise Learning
   3. Update the Custom Field – *Volunteer Coordinator OHS Orientation Complete* (check box)onVC’s Better Impact profile, as applicable.
2. Add Department Banner and Mission Statement using the guidelines as outlined in [Appendix C of the VRMS Administrators Guide](file:///Y:\Risk\DOCS\Volunteer%20System\1-Active%20Files\Training%20Guide%20&&amp;%20Sources\VRMS%202.0%20Additions\Better%20Impact%20(BI)%20Account%20Set-Up.vJul2019.docx).
3. Add account Contact information (address; email, phone, etc.)
   1. Go to: Configuration tab
   2. Organization Settings
   3. Contact info
4. Create Applications (default application) as directed in the document [*Creating Applications in Better Impact*](file:///Y:\Risk\DOCS\Volunteer%20System\1-Active%20Files\Training%20Guide%20&amp;%20Sources\VRMS%202.0%20Additions\Better%20Impact%20(BI)%20Account%20Set-Up.vJul2019.docx#_Creating_Applications_in)
5. Optional: Create General Interests as directed in the document [*Creating General Interests*](file:///Y:\Risk\DOCS\Volunteer%20System\1-Active%20Files\Training%20Guide%20&amp;%20Sources\VRMS%202.0%20Additions\Better%20Impact%20(BI)%20Account%20Set-Up.vJul2019.docx#_Creating_General_Interests)in the VRMS Administrators Guide
6. Optional: Create Activity templates for roles that will be used for multiple categories or over multiple terms/years
7. Include a link to your account on your recruiting interface (see Better Impact instructions [Links for Website and Email](https://www.betterimpact.com/volunteer-impact-help/organization-settings-links-website-email/))

*Page 11 in VRMS Admin Guide*

Administrators’ Roles and Responsibilities

*Note: References to “Volunteer Coordinators” refers to any administrator that is involved in the management of volunteers. Dept. Administrators have additional responsibilities and function access in Better Impact, but are still considered “volunteer coordinators” for training and required documentation purposes.*

In addition to the Enterprise/System Administrator, there are two levels of administrator access in the University’s VRM system. Each role has different responsibilities; and levels of functionality in the Better Impact system. The following describes the expectations of each role:

Enterprise/System Administrator:

1. Staff member of the Risk Management & Insurance department
2. Administrative liaison between the University of Calgary and the online system provider, Better Impact
3. Liaison between the department accounts and the University’s enterprise account
4. Manages the allotment of Better Impact accounts to University faculties/departments/programs
5. Authorizes and removes department administrators’ access to the departments’ Better Impact accounts
6. Authorizes and removes Volunteer Coordinators’ access to the department’s Better Impact account
7. Ensures Oaths of Confidentiality are completed and on file
8. Creates enterprise Qualifications and Custom fields
9. Creates department Qualifications and Custom Fields
10. Coordinates processes for meeting regulatory compliance components
11. Facilitates training for administrators
12. Coordinates processes for reporting/auditing requirements
13. Coordinates billing, as applicable

VRMS Account Administrators

Dept Admin

1. The primary contact for the department, and liaison to the Enterprise/System administrator
2. Oversees/trains Volunteer Coordinators
3. Obtains and forwards Volunteer Coordinators’ Oaths of Confidentiality
4. Advises and confirms Volunteer Coordinators complete the Volunteer Coordinator OHS Orientation
5. Communicate legislative compliance requirements to Volunteer Coordinators
6. Develops processes for the inclusion of required Volunteer OHS Orientations and Hazard Assessments, as applicable
7. Develops processes for retaining historical data and documentation, as per respective University policies
8. Configures department’s Better Impact account – contact information; customizing/branding
9. Performs any functions necessary to manage volunteers, as determined by the department's structure, including: (Note: this list is not exhaustive)
   1. Recruiting
   2. Approving applicants
   3. Creating activities
   4. Communicating with volunteers
   5. Assigning volunteers to activities
   6. Scheduling shifts
   7. Logging and/or approving logged hours
   8. Ensuring regulatory compliance elements are included in Better Impact (as per instructions from Enterprise)
   9. Ensuring volunteers agree to and complete waivers; Volunteer OHS Orientation, and any other required documentation
   10. Provisioning site-specific OHS Volunteer Hazard Assessments forms
   11. Provisioning volunteers with any necessary training to perform the role
   12. Reviewing site-specific Hazard Assessments with volunteers and obtaining signatures on the Volunteer Hazard Assessments forms
   13. Ensuring all OHS requirements are met
   14. Retaining OHS documentation for audit/reporting

Volunteer Coordinator (VC)

1. Performs any functions necessary to manage volunteers, as determined by the department's structure, including: (Note: this list is not exhaustive)
   1. Recruiting
   2. Approving applicants
   3. Creating activities
   4. Communicating with volunteers
   5. Assigning volunteers to activities
   6. Scheduling shifts
   7. Logging and/or approving logged hours
   8. Ensuring regulatory compliance elements are included in Better Impact (as per instructions from Enterprise)
   9. Ensuring volunteers agree to and complete waivers; OHS Orientation, and any other required documentation
   10. Provisioning site-specific OHS Volunteer Hazard Assessments forms
   11. Provisioning volunteers with any necessary training to perform the role
   12. Reviewing site-specific Hazard Assessments with volunteers and obtaining signatures on the Volunteer Hazard Assessments forms
   13. Ensuring all OHS requirements are met
   14. Retaining OHS documentation for audit/reporting

*Updated Jun 2020 KM*

Managing UC Volunteers – Legislative Components in Better Impact

*There are several legislative requirements governing the engagement of volunteers at the University of Calgary. Many of these requirements can be managed within the Better Impact system. It is important that department administrators are familiar with these requirements and the necessary steps to include in the volunteer management process.*

Note: The Better Impact system has a feature called *Document Library.* Updated versions of any documents referenced in this document can be found in the *Enterprise* *Document Library;* on the [Risk Management & Insurance Website](https://ucalgary.ca/risk/risk-management-insurance); or the governing department’s website.

Definition of a University of Calgary Volunteer

Individuals who, with or without special training, provide services or assistance to the University without payment of fees, wages or salary, and without any expectation of any kind of compensation (except travel costs or meal expenses).

*Volunteers must be:*

* *over 18 years old, and either:*
* *have Canadian Citizenship or Permanent Resident Status in Canada; or are*
* *a current international student enrolled full time at the University of Calgary and hold a Study Permit. In this case, the volunteer activities must be short-term and incidental to their student work.*

Freedom of Information and Protection of Privacy Act (FOIP)

The types of information that can be collected about individuals is determined by the FOIP Act, and governed at the University by the Privacy Office <http://www.ucalgary.ca/legalservices/foip/>.

To meet compliance in the engagement of volunteers at the University, the following requirements must be met:

* All Department Administrators and Volunteer Coordinators with access to Better Impact data must sign an ***Oath of Confidentiality*** (see sample at [Appendix D](#_Appendix_D:_Oath))
* A ***Privacy Statement***must be placed on all Better Impact applications – See [*Creating Applications in Better Impact*](#_Creating_Activities_in)for required placement and wording
* An ***opt-out disclaimer*** must be included in all electronic communications sent to volunteers. For disclaimer wording, refer to [Appendix H – FOIP Compliance Guidelines](#_Communicating_with_Volunteers)
* ***Photo Consent*** [Filming and Photography](https://ucalgary.ca/risk/risk-management-insurance/events/filming-and-photography-university-property) forms must be signed by volunteers as outlined in the University’s Privacy Policy <https://www.ucalgary.ca/policies/files/policies/privacy-policy-2011.pdf>
* Information collected from a volunteer must specifically align with the purpose of its collection as it applies to the volunteer opportunity. Guidelines for, and examples of, acceptable data collection can be found at [Appendix H: FOIP Compliance Guidelines](#_Appendix_H:_FOIP)
* **Email communications should be cc’d to the sender’s ucalgary.ca address and include the names of those the email was sent to.** Volunteers’ profiles and associated **data** must be retained within Better Impact system for a minimum of twelve (12) years as per the University’s Master Records Retention Rule [GV-610-Risk Management](https://asc.ucalgary.ca/uclass/gvblock/#gv610). See [*Archiving Inactive Volunteers*](#_Archiving_Inactive_Volunteers) for instructions on retaining these records.

Workers Compensation (WCB)

To meet the terms of the University’s WCB coverage, volunteers must be registered, and the dates of their activities and hours worked recorded. These requirements are facilitated through the VRM system and recorded in Better Impact. Specifics are included in the instructions for [*Volunteers’* *Hours: Logging, Approving, and Reporting*](#_Volunteer_Hours:_Logging,)

Legal Liability Compliance

***Release of Liability, Waiver of Claims and Assumption of Risks Agreement* (see sample at** [Appendix E](#_Appendix_E:_Release_1)**)** Volunteers are required to accept the agreement before engaging in volunteer activities at the University. This agreement is incorporated in two places in Better Impact. To insert these statements, they must be added into the *Policy Statement* section of the application form at the department level. Additionally, a Custom Field created at the Enterprise level is included automatically on every application. To ensure the volunteer has accepted the agreement, Administrator’s must approve the Custom Field before the applicant can be accepted as a University volunteer. This will remain displayed on the volunteer’s Better Impact profile until the volunteer is archived.

For a current version of the **Release of Liability, Waiver of Claims and Assumption of Risks Agreement** go to the *Enterprise* *Document Library* in Better Impact, or the [Risk Management & Insurance website](https://ucalgary.ca/risk/risk-management-insurance/services/volunteer-registration-and-management)

Human Resources

Occasionally, a role is better filled as a paid position rather than a volunteer position. If in doubt, departments should check with their HR representative for clarity.

Occupational Health and Safety (OHS)

Under the *OHS Act, Regulations and Code, v*olunteers are considered to be *workers.* At the University of Calgary volunteers are regarded as employees and, as the volunteers’ *employer*, the University is required to ensure their safety. These processes are governed by the University’s *Occupational Health and Safety Management System (OHSMS)*. The VRM system includes processes to help track the OHS requirements for volunteers and Volunteer Coordinators; and to facilitate volunteers’/applicants’ access to prepared Hazard Assessments.

Review the page [Occupational Health & Safety Process](#_Occupational_Health_and) for more information about the responsibilities of Volunteer Coordinators for incorporating OHS elements into the VRM processes, including:

* completing the [Volunteer Coordinator OHS Orientation](https://learning.my.ucalgary.ca/psp/lmprd/EMPLOYEE/ELM/c/LM_SS_LEARNING.LM_LEARNING_ITEMS.GBL?Page=LM_SS_ITM_DTL&amp;LM_CI_ID=1327);
* directing volunteers to complete the **Volunteer OHS Orientation** **hosted as an eLearning module in Better Impact**;
* and, specific to each activity, the preparation and retention of **Volunteer Hazard Assessments**

## Creating Application Forms in Better Impact

Planning is essential. The more thought given to what you need to know about your volunteer applicants (application forms), and what your volunteers need to know about your opportunities (general interests and activities), the more successful you will be in matching volunteers to the appropriate opportunities. For ideas, refer to [Appendix L – Sample Application Forms for Different Volunteer Types](#_Appendix_L_–)

There are three possible application forms in Better Impact. *Volunteer Form 1* is automatically set as the *Default Application,* and is used in most cases. The following instructions apply to **ALL** versions of applications.. Those items identified with  **Required Practice** must be included**.**

*Note: Department = Organization*

1. Go to the *Configuration* tab (top bar menu).
2. Select *Organization* Settings; then *Application Form Settings.*

Note: Standard **Contact information** is included on all applications; is **not** **displayed** in the *Application Form Settings;* and does **not** need to be selected. These include:

* First and Last Names
* Legal First Name
* Address
* Email Address
* Phone

**Additional Information** – collected on all applications to the University of Calgary

* Emergency Contact Name & Phone Numbers
* University Affiliation – Choices include: Student; staff/faculty, public, degree grads
* **Required Practices**

***\* Items marked with an asterisk*** *have already been included on all forms by the Enterprise Administrator at the time the department account was set up. Should these elements be inadvertently deleted or modified, please update as per the following instructions. Any* ***items not identified by an asterisk*** *must be performed by the Dept Admin.*

1. \*Under General Settings select *New volunteers require approval*
2. Select *Automatically send an email to new volunteers after the volunteer application form is filled out*
3. In *New Volunteer Email Message* field **include the following statements** along with any other information you would like your volunteers to know in advance of being approved:
   1. “**As part of the application you were asked to accept our *Waiver of Liability.* This document can be reviewed in detail by going to the Risk Management & Insurance website at:** <https://ucalgary.ca/risk/sites/default/files/teams/16/volunteer-waiver-of-liability-electronic.pdf> “
   2. “**Should your application be accepted, you will be required to complete the** Volunteer OHS Orientation**, if you have not already. It can be accessed at** [*Volunteer OHS Orientation*](http://bttr.im/8a460)
4. Ensure a relevant message is included in the *Disabled Form Message* field.

* **All steps in *Step One Settings* are Required Practices and should be in place when the account was issued**

1. \*Under the *Step One Settings*section:
   1. \*Deselect “Show the birthdate field…”
   2. \*Select “Only show required contact information…”

**\*All steps in *Policy Settings* are**  **Required Practices**

1. \*Under *Policy Setting*s
   1. \*Select “*Require volunteers to accept your volunteer policies as the first step in filling out the volunteer application form”*
   2. \*Do **NOT** select *“Display Acceptance Policy in page”* as this will unnecessarily display the waiver text in its entirety, on the login page.
   3. \*Under *Policy Title* include the text: **RELEASE OF LIABILITY, WAIVER OF CLAIMS AND ASSUMPTION OF RISKS AGREEMENT**
   4. \*Under *“Policy Acceptance Checkbox Label”* include the text (including the information about the waiver button: “**I have read and understood the waiver below (click on Waiver button)”**
   5. \*Under *Policy Button Text* enter: **WAIVER**
   6. \*Under *Volunteer Policies Text* include the **“RELEASE OF LIABILITY, WAIVER OF CLAIMS AND ASSUMPTION OF RISKS AGREEMENT”** text

Note: Better Impact does not always correctly display Word formatting when copy/pasted, it is recommended that you remove formatting before copying, then format to match the original using the tools in the Better Impact edit window.

* **Recommended Practices for *Step Two Settings***

1. Under *Step Two Settings* section:
   1. Do NOT select *Show General Interests or Show General Availability* as applications become unduly long. It is better to collect this information through the volunteer’s profile once they have been accepted as a volunteer for your department.
   2. Select only those *Classifications* crucial to screening applicants, if at all. Additional classifications can be collected later.
   3. As *General Availability & General Interests* have not been selected previously, there is no need for any entries under these respective *Form Headers.*
   4. As most applications will require some *Qualifications and/or Custom Fields*, entries under their *Form Headers* may be desired (optional).

* **Required Practice:** 
  1. \*Under *Override notice to complete application form text* include the ***Privacy Statement*** as shown in the **box on the following page** – ensure that links in the statement are working
  2. \*Select *Put this message inside a “notice” container****.***
  3. \*Do **NOT** select ***Also include this message at the bottom of the application form****.*

*NOTE*: Link to Privacy Policy: <https://www.ucalgary.ca/policies/files/policies/privacy-policy-2011.pdf>

***Privacy Statement***

*This information is collected under the authority of section 33(c) of the Freedom of Information and Protection of Privacy Act. It is required for the recruitment, scheduling, and associated reporting of volunteers and volunteer activities at the University of Calgary. For questions, please contact the FOIP Office at 403-210-8405 or at* [*foip@ucalgary.ca*](mailto:foip@ucalgary.ca) *or refer to the* [*University of Calgary Privacy Policy*](https://www.ucalgary.ca/policies/files/policies/privacy-policy-2011.pdf)*.*

1. Under the *Application Complete Settings* section*:*
   1. Enter a customized messaging acknowledging receipt of the application and any information the applicant should know:
      1. if there are not activities/opportunities available
      2. if there are activities/opportunities available
2. *Save* the form
3. Review the form by selecting one of the green buttons at the bottom of the screen to get the same view a volunteer applicant would see
4. *Generate Link* button will create a link to be used on a website or other recruitment digital mediums to automatically connect users to this application form

* **Recommended Practice:** Use *Volunteer Form 1* as your general default application**.** Use Application Forms 2 and/or 3 for opportunities that require more extensive screening, past experience, or specialized skills.

**Agreements & Acknowledgements – Volunteers**

The following are required custom fields that appear once on all application versions. These fields are created at the Enterprise level and cannot be removed by the department. They require an affirmative (yes) response and administrators must provide approval before accepting the applicant as a volunteer. The responses to these fields are retained on the volunteer’s profile for reference.

* I have read and understood the Waiver v2-Nov 2018 found in the description box (red icon) beside this field.
* I am age 18 or older.
* I previously completed the Volunteer OHS Orientation course (EHS037) in PeopleSoft.

For additional video instructions for setting up applications in Better Impact go to: <https://www.betterimpact.com/volunteer-impact-help/help-application-form/>

### Updated Jun 2020

Create an Activity

Refer to the document [Creating Activities in Better Impact](#_Creating_Activities_in) for guidance and explanation of terms in the following instructions.

1. Go to: *Activities* tab(top menu bar)
2. Select *Manage Activities*
3. First create (or select) a Category:
   1. Select *New Category* (green button at bottom of screen)
   2. Enter *Category* name
   3. Enter *Description*. This can include information about your event/program, images, links to more information, etc.
   4. Select *Save*
4. Select *New Activity* (green button at bottom of screen)
   1. Select *Basic Info* (default)tab (top menu bar)
      1. Enter *Activity* name
      2. Select *Category* from drop-down menu
      3. Select *Activity Report Group* (these are created at the Enterprise level and align with our reporting categories for WCB purposes – see document [*Appendix B – Activity Report Group Examples*](#_Appendix_B:_Activity)to determine which reporting Group best corresponds to your activity
      4. Select *Application Form* version (Default Application Form = Application 1)
      5. Select or deselect *Active,* as applicable
      6. Select or deselect *Allow Hours Logging,* as applicable
      7. Select or deselect *Auto Log Hours*, as applicable (this setting should only be selected for large volume recruitment activities that require little oversight of attendance)
      8. Select or deselect *Backup List*, as applicable
      9. Enter in *Description - pre-assigned* a brief description of the required duties and expectations of the Activity – refer to [Occupational Health and Safety Process](#_Occupational_Health_and) for specifics
      10. If desired, enter in *Description – post-assigned* any information a volunteer should know once they have been assigned to the activity
      11. If desired, enter in *Internal Notes* information necessary for other administrators – this is not a volunteer-viewable field
      12. Select *Next* (green button at bottom of page)
   2. *Schedule* tab
      1. As applicable, select *Recurring Pattern, Disjointed, One Time, Seasonal, No Schedule* (green buttons at top of page)
      2. If previously created, select from *Choose a Template* drop-down an applicable schedule OR
      3. Enter schedule *Pattern* as per proffered fields based on the previously selected schedule pattern
      4. These parameters can be saved as a template for future use by selecting *Save this as a template* (green button)
      5. Enter *Pattern Range* (dates/time period) as per proffered fields based on the previously selected schedule pattern
      6. Select *Check Shifts* (green button) for a total number of shifts created
      7. Select *Next* (green button at bottom of page)
   3. *Visibility and Automation* tab – these selections will determine who can see the activity and will automate shift assignment and scheduling
      1. Select parameters as applicable to your needs (self-explanatory) – refer to BI tutorial Step 3 for descriptions of settings <https://www.betterimpact.com/volunteer-impact-help/activities-add-new/>
      2. Select *Next* (green button at bottom of page)
   4. *Qualifications* tab
      1. Select displayed *Qualifications* as applicable to this Activity

\*\*Note: *Qualifications* required by ALL University of Calgary volunteers do not need to be selected/specified

* + 1. Select *Next* (green button at bottom of page)
  1. *Feedback Fields* tab –
     1. Include the ***Feedback Field*** *“Employee Volunteer Hours”* on **ALL** activities where UofC staff might volunteer during their regular working hours
     2. Select the box beside any other *Feedback Field* applicable to this activity.

\*\*When hours are logged for the activity, volunteers will be asked the question posed in the “Display to volunteers as” column.

* 1. *\*\*Classifications* tab – these selections are optional. They are search criteria for volunteers to filter opportunities based on their particular interests and availability

1. Select displayed *Classifications* under each tab (*Activity, Suitability, Time Commitment, Duration Commitment, Schedule*) as applicable to this Activity.
2. Select *Next* between tabs(green button at bottom of page)

\*\*These criteria have not yet been optimized so may not result as expected.

1. Select *Save* (green button at bottom of page)

*Updated Jun 2020*