



Volunteer Systems Handbook

*A guide for Catholic Charities team members
when using volunteer services.*

CREATED FEBRUARY 2022

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CATHOLIC CHARITIES OF CENTRAL & NORTHERN MISSOURI INTRODUCTION

THE PRAYER OF CATHOLIC CHARITIES

Loving God, source of all life, we thank you for your many blessings and for calling us to love and to serve. Your Son reminds us that whatever we do for the least of our brothers and sisters, we do for you. May Your Spirit guide our mission of serving those in need, improving social conditions for all, and calling others to do the same. We ask this trust in your loving care. Amen.

MISSION STATEMENT

Inspired by the Gospel of the Beatitudes as proclaimed by Jesus Christ, Catholic Charities of Central and Northern Missouri (CCCNMO) is committed to providing care and creating hope for the lives of the vulnerable through compassionate social services that respect the dignity of each person and engage the local community in our mission.

OUR CORE VALUES

- We believe in the message of Jesus that conveys love and hope.
- We affirm the sacredness and dignity of human life.
- We work in partnership with others who share in our mission.
- We pursue excellence and uphold integrity in all we do.
- We offer services to those in need regardless of background, belief or circumstance.

OUR HISTORY

Founded May 17th, 2011 Catholic Charities of Central and Northern Missouri is a 501(c)(3) social service agency that provides a range of programs and services to those in need in our 38 county service area regardless of faith, culture, or situation.

We believe in assisting the most basic and immediate needs of the poor and vulnerable and by giving them the help and resources needed for long-term change. We choose to focus on those areas of greatest need and avoid duplication of services whenever possible. We also belong to the nation's largest private social services network through our affiliation with Catholic Charities USA.

CATHOLIC SOCIAL TEACHINGS

Life and Dignity of the Human Person

The Catholic Church proclaims that human life is sacred and that the dignity of the human person is the foundation of a moral vision for society. This belief is the foundation of all the principles of our social teaching.

Call to Family, Community, and Participation

The person is not only sacred but also social. How we organize our society in economics and politics, in law and policy, directly affects human dignity and the capacity of individuals to grow in community. Marriage and the family are the central social institutions that must be supported and strengthened, not undermined. We believe people have a right and a duty to participate in society, seeking together the common good and well-being of all, especially the poor and vulnerable.

Rights and Responsibilities

The Catholic tradition teaches that human dignity can be protected and a healthy community can be achieved only if human rights are protected and responsibilities are met. Therefore every person has a fundamental right to life and a right to those things required for human decency.

Option for the Poor and Vulnerable

A basic moral test is how our most vulnerable members are faring. In a society marred by deepening divisions between rich and poor, our tradition recalls the story of the Last Judgment (Matthew 25:31-46) and instructs us to put the needs of the poor and vulnerable first.

The Dignity of Work and Right of Workers

The economy must serve people, not the other way around. Work is more than a way to make a living; it is a form of continuing participation in God's creation. If the dignity of work is to be protected, then the basic rights of workers must be protected—the right to productive work, to decent and fair wages, to the organization and joining of unions, to private property, and to economic initiative.

Solidarity

We are one human family whatever our national, racial, ethnic, economic, and ideological differences. We are our brothers' and sisters' keepers, wherever they may be. Loving our neighbor has global dimensions in a shrinking world. At the core of the virtue of solidarity is the pursuit of justice and peace. Our love for all our sisters and brothers demands that we promote peace in a world surrounded by violence and conflict.

Care for God's Creation

We show our respect for the Creator by our stewardship of creation. We are called to protect people and the planet, living our faith in relationship with all of God's creation.

CCCNMO ADMINISTRATIVE TEAM

DAN LESTER

Executive Director

Phone: (573) 658-0021

Email: dlester@cccnmo.org

DAN KEMPKER

Director of Finance

Phone: (573) 797-1366

Email: dkempker@cccnmo.org

LESLIE PRENGER

Director of Support Services

Phone: (573) 230-3743

Email: lprenger@cccnmo.org

ASHLEY WISKIRCHEN

Director of Communications

Phone: (573) 658-0094

Email: awiskirchen@cccnmo.org

SR. KATHLEEN WEGEMAN

Director of Mission Integration

Phone: (573) 694-0093

Email: kwegeman@cccnmo.org

CHELLE SMITH-VANDERGRIFF

Volunteer Services Coordinator

Phone: (573) 415-7173

Email: csmith-vandergriff@cccnmo.org

CCCNMO PROGRAMS

CATHOLIC CHARITIES COMMUNITY SERVICES

Disaster Relief

Our agency provides short-term and long-term recovery services to individuals and families dealing with the aftermath of natural disasters like tornadoes, floods, and other catastrophes. Catholic Charities responds both immediately and for the long haul, helping those affected get back on their feet.

Housing Counseling

This program offers education and counseling for those who struggle financially to help them achieve long-term prosperity. Our goals are to promote financial literacy and financial responsibility and increase responsible homeownership. Certified by the United States Department of Housing and Urban Development (HUD), our counselors cover topics such as budgeting, mortgage and banking information, credit scores, and savings strategies.

Immigrant Outreach and Case Management

Our Hispanic Resource program is our newest program in order to assist with a vulnerable population that is unfortunately often overlooked. With the assistance of a Bilingual Hispanic Resource Coordinator, families that have limited or no proficiency in English can be assisted with finding resources and gaining insight and access to information that they are unable to obtain due to their language barrier.

CATHOLIC CHARITIES COUNSELING SERVICES

Our agency offers mental health services that fully integrate the mind, body, and spirit using a combination of traditional therapy modalities and Christian-informed approaches. Current services include individual and family counseling, school-based counseling, Hope Emotional Support ChatBot, and Clinica para la Familia and Spanish counseling resources.

CATHOLIC CHARITIES HEALTH AND NUTRITION SERVICES

CCCNMO's Health and Nutrition Services is composed of several programs that promote a healthy lifestyle. We are proud partners of The Food Bank for Central and Northeast Missouri.

Buddy Packs

Thousands of children rely on free and reduced-price lunches at school, but what about their nutritional needs on weekends? Buddy Packs provide meals and snacks for elementary students to take home at the end of each school week, meeting that gap. Buddy Packs are pre-packaged bags with a variety of food each week, with items like easy-to-make meals, cereal and peanut butter.

Client Choice Food Pantry

Client choice pantries allow people seeking food assistance to choose for themselves what products they receive, rather than being presented with a preselected and packaged assortment of food. Following the client choice model is important to CCCNMO, because we care about the individuals and families who come to our pantry and believe that client choice is a way to show that we care enough to serve them in a dignified and personal matter.

Senior Food Boxes

The Commodity Supplemental Food Program (CSFP or Senior Food Boxes) works to improve the health of low-income persons at least 60 years of age by supplementing their diets with nutrition USDA Food. Through our partnership with The Food Bank for Central and Northeast Missouri and the United States Department of Agriculture (USDA) distributes Senior Boxes to qualifying

residents in Cole and Howard Counties.

CATHOLIC CHARITIES FAMILY IMMIGRATION SERVICES

CCCNMO provides immigration legal services as a way to reunite families and promote self-sufficiency for immigrants through low-fee legal assistance in immigration matters before the United States Citizenship and Immigration Service. Catholic Charities staff are DOJ Accredited Representatives and assist U.S. Citizens, Lawful Permanent Residents and immigrants with services including:

- Adjustment of Status
- Naturalization and Citizenship
- Legal Permanent Residency
- Deferred Action for Childhood Rivals

CATHOLIC CHARITIES REFUGEE SERVICES

Over the years, we have welcomed people from countries in Asia, Africa, Eastern Europe, and Latin America regardless of their color or creed. Our staff ensure culturally competent services to our clients, offering refugees initial housing; provision of furniture, clothing, household goods and food; orientation and initial needs assessments; education placement of children in the appropriate school; introduction to government and community service providers; and extensive case management services. Many families are also provided with a support network of individual volunteers.

PARISH SOCIAL MINISTRY

Parish Social Ministry works with parishes to empower parishioners to live out their baptismal call to serve the needs of those living right in their own communities. Catholic Charities assists in establishing or enhancing current parish ministries and programs to address unmet community needs, gather and train volunteers, and help obtain any additional funding needed to implement these services.

CCCNMO VOLUNTEER SERVICES & MANAGEMENT

VOLUNTEER RESOURCES

- **CCCNMO Home Page**
www.cccnmo.diojeffcity.org
- **CCCNMO CERVIS Website**
https://cccnmo.cervistech.com/acts/console.php?console_id=0268&console_type=event&ht=1
- **CERVIS Technologies YouTube Channel**
<https://www.youtube.com/channel/UCejjH0wyucvoXhWUXuFRQGA>
- **Volunteer Grid CCCNMO Master Copy Excel Spreadsheet**
Located in Teams (CCCNMO, General, Volunteer Management, Volunteer Information & Tracking)
- **Volunteer Handbook – Updated February 2022**
Located in Teams (CCCNMO, General, Volunteer Management, Volunteer Handbook)
- **Volunteer Agreements & Liability Waiver**
Located in Teams (CCCNMO, General, Volunteer Management, Volunteer Paperwork)
- **CCCNMO Driving Policy**
Located in Teams (CCCNMO, General, Volunteer Management, Volunteer Paperwork)
- **CCCNMO Media Authorization for Volunteers/Employees**
Located in Teams (CCCNMO, General, Volunteer Management, Volunteer Paperwork)
- **Volunteer Contributions Record and Volunteer Service Record**
Located in Teams (CCCNMO, General, Volunteer Management, Volunteer Information & Tracking)
- **Service Project Notes**
Located in Teams (CCCNMO, General, Volunteer Management, Volunteer Systems)

VOLUNTEER ONBOARDING PROCEDURE

Pre-Service Requirements

Prior to beginning service, the following is required for all volunteers serving for Catholic Charities programs in any capacity:

- Online Volunteer Application (CERVIS)
- Criminal Background Check
- Safe Environment/VIRTUS Compliance

Online Volunteer Application

Volunteers will complete an online application through the Catholic Charities of Central and Northern Missouri Community Event Registration & Volunteer Information System (CERVIS). Links for Catholic Charities custom volunteer portal can be found on our website at <https://cccnmo.diojeffcity.org/volunteer/>. Each person wishing to volunteer will complete a volunteer application. Volunteers under the age of 14 will need to be added to a parent/guardian's account; volunteers 14 and older are able to create and maintain their own account. The CCCNMO Volunteer Agreements and Liability Waiver is completed as part of the online application and an e-signature is required for all volunteers (an e-signature is required for all volunteers under the age of 18). Please refer to Appendix A for the most updated Volunteer Agreements and Liability Waiver. Additional volunteer forms such as the CCCNMO Driving Policy and CCCNMO Media Authorization for Volunteers/Employees (along with a copy of driver's license and insurance) can be uploaded

directly to a volunteer's profile in CERVIS by selecting "Upload File Attachments." Please refer to Appendix B and C for the most updated forms.

After completing the onboarding process, volunteers are welcome to begin signing up for any of the opportunities listed in CERVIS at their convenience. To register for an opportunity, volunteers will log in to their account via our website at <https://cccnmo.diojeffcity.org/volunteer/> or through our online portal directly. Volunteers will select their name from the list of participants on their profile, select the desired opportunity and/or time slot, then select "Register" at the bottom of the page. After successfully registering for an event, volunteers will receive an email confirmation with opportunity details. Volunteers will also receive an email reminder 1-2 days prior to the service opportunity. In addition to necessary details, both emails will contain a cancellation link and a mobile sign-in link.

Criminal Background Check

Volunteers are subject to a criminal record screening prior to service. If a volunteer serves more than one program only one screening is necessary. All information related to the screening is confidential and stored in a secure place.

Volunteers may still apply, even if they have a criminal record. Catholic Charities will review the content of their criminal history and determine if they meet our standards for work with the agency. Please disclose this information to the Volunteer Services Coordinator, so Catholic Charities can be aware of this history when processing the application. The following are guidelines that the agency follows:

- In general, persons with misdemeanor charges and/or convictions that were committed more than 5 years ago may be considered as a volunteer, based on the volunteer opportunity, the level of supervision available, and the charges and/or convictions shown.
- Misdemeanor charges and/or convictions committed less than 5 years ago may be considered if the crime was not of a sexual nature, or did not include violence, theft, or fraud. All felonies of a violent or sexual nature will disqualify an individual from working as a volunteer.
- Other felony charges that were reduced to misdemeanors may be considered if the crime was not of a sexual nature, or did not include violence, drugs, theft, or fraud.
- DUIs and other related charges and/or convictions involving unsafe or reckless driving will disqualify a volunteer from driving on behalf of Catholic Charities (transporting clients, driving agency vehicles, etc.), but may not disqualify them from volunteering if that is the only thing on their record.
- All background checks will be reviewed by the Volunteer Services Coordinator and/or Executive Director. Final approval of any volunteers with criminal histories will be at the discretion of Catholic Charities.

Safe Environment/VIRTUS Compliance

Catholic Charities of Central and Northern Missouri is considered the Social Services arm of the Diocese of Jefferson City. Requirements for Safe Environment/VIRTUS compliance includes completion of the Protecting God's Children program.

This education is intended to educate adults in the prevention of sexual abuse of children. VIRTUS training can be completed online or in person at a designated training site. The training takes approximately 2 hours to complete. If a volunteer has recently completed the VIRTUS training with another agency, job, or Parish, they will not need to do the training again. Please let the staff member in charge of your orientation know if this applies to you, so they can verify this information. In addition to the training, volunteers are also required to complete the Diocese of Jefferson City Code of Pastoral Conduct. Volunteers are asked to review this document

(particularly the Volunteers Code of Conduct) and sign receipt of this form.

Additional Paperwork

Other paperwork such as the CCCNMO Driving Policy and CCCNMO Media Authorization for Volunteers/Employees will not necessarily prevent someone from volunteering, however these forms should be completed as soon as possible. Paperwork can be uploaded into a volunteer's CERVIS account or shared directly with the Catholic Charities Volunteer Services Coordinator.

Other Requirements

Depending on the nature of their work, some programs have additional requirements before a volunteer may begin to serve.

DETERMINING PROGRAM NEEDS

Occasional Volunteers

Individuals and groups who donate time periodically to the works of Catholic Charities are valued members of our team. These volunteers will complete service opportunities based on interest and availability. Those who help on occasion are well suited for specific service projects, community engagement efforts, and opportunities that require basic orientation and minimal supervision/management.

Routine Volunteers

Individuals and groups who donate time routinely become well-known by our team. These volunteers will continue to register for service opportunities that fit specific interests and availability. Duration of service can vary by season/semester, or it may be ongoing. Those who help on routinely are well suited for more advanced service projects, ongoing program opportunities, and opportunities that require supplemental training/orientation and more regular supervision/management.

Specialized Volunteers/Contracted Professionals/Interns

Individuals and groups who volunteer for service opportunities that fit specialized interests typically will offer services for a predetermined amount of time. Those who help in this way are well suited for advanced service projects, sponsor group programs, and opportunities that require intensive training/orientation. These volunteers have training and experience that leads them to excel at their service but require a higher level of supervision/management to ensure they are upholding the mission, policies, and procedures of Catholic Charities.

CREATING VOLUNTEER OPPORTUNITIES

Procedure and Timeline for CERVIS Opportunities

All Catholic Charities staff and Sponsor Group Program Leads should be trained in creating CERVIS opportunities. Until team members are fully trained, opportunities must be approved by the Catholic Charities Volunteer Services Coordinator prior to posting. Team members ability to post independently will be determined on a case-by-case basis. Opportunities must follow the instructions below; failure to do so may result in the opportunity being removed from publication.

While there is no limit on how early a request can be entered into CERVIS, it is recommended that opportunities be posted according to the following schedule:

- 2-6 weeks in advance for specific service projects or volunteer requests
- 6-8 weeks in advance for routine program needs

Opportunities that are more fluid can be entered into CERVIS within the same week as the scheduled event, though this is not good practice. The deadline to enter an opportunity is 2 business days before the scheduled event to allow adequate response time.

PREPARING FOR VOLUNTEER OPPORTUNITIES

Leading up to the service opportunity the team member organizing the opportunity, the secondary organizer, the organizer's immediate supervisor, and other relevant staff member will touch base regarding event details. Meeting notes with a clear action plan/timeline should be taken and sent to necessary parties. This may include but is not limited to creating a shared calendar event or itinerary with necessary details, reserving a fleet vehicle, gathering event supplies, and reaching out directly to volunteers to communicate event details.

WELCOMING & ENGAGING VOLUNTEERS

The Catholic Charities team member organizing the opportunity, their immediate supervisor, or another predetermined staff member will be present when a volunteer arrives on site. New volunteers should be given a tour of the location and introduced to other members of the CCCNMO team. If promotional items (shirts, pens, stickers, coasters, etc.) are available, consider offering them to new volunteers. Volunteers will use CERVIS to sign-in and sign-out of their opportunity, which will allow Catholic Charities to properly track volunteer hours and impacts.

DELEGATING VOLUNTEER TASKS & PROVIDING SUPPORT

The Catholic Charities team member organizing the opportunity, their immediate supervisor, or another predetermined staff member will be onsite to oversee volunteers through the duration of their service opportunity. Volunteers will need varying degrees of supervision/management, but every effort will be made to help empower volunteers to work independently.

TRACKING VOLUNTEER HOURS

Volunteers will use CERVIS to track volunteer hours and impacts. It is the responsibility of the event organizer to properly tag funding/grant allocation for the opportunity and verify accurate time reports.

RECEIVING VOLUNTEER FEEDBACK

CERVIS opportunities will be programmed to automatically generate a thank you email after a volunteer serves with Catholic Charities. This email will include a link for a survey in which volunteers can provide feedback about their service experience. This information will be used to improve volunteer systems and management strategies, as well as determine which staff would benefit from additional administrative support.

ONGOING VOLUNTEER RECRUITMENT & INVOLVEMENT

Ongoing recruitment and community engagement is essential in developing a robust volunteer and intern program. It is crucial that as Catholic Charities continues to grow and expand that we adhere to standardized procedures for volunteer recruitment. All "mass" communication with external audiences, including volunteers, should be approved by the Director of Communications before sending. Mass communications for volunteers should be sent through CERVIS to allow us to measure and improve our communication techniques. This includes immediate volunteer needs (such as a cancellation, urgent request, etc.), and team members should allow at least one hour for communication approval by the Catholic Charities Director of Communications.

CCCNMO COMMUNITY EVENT REGISTRATION & VOLUNTEER INFORMATION SYSTEM (CERVIS)

CREATING/ACCESSING A CERVIS ACCOUNT

- To create an account in our online volunteer portal (CERVIS), team members can visit the volunteer page of the CCCNMO website at <https://cccnmo.diojeffcity.org/volunteer/> or visit the CCCNMO CERVIS portal directly at https://cccnmo.cervistech.com/acts/console.php?console_id=0268&console_type=event&ht=1.
- Account creation will require a phone number and an email address. After arriving at the sign-in page, team members will be prompted to type their email address and first name, then select “Next.”

CCCNMO CERVIS Sign in

 To proceed with the CERVIS Volunteer registration process, we need to determine whether or not you have a Volunteer profile in our system. To create a new Volunteer profile or to login to your existing profile, please enter your E-mail address and first name below. If you do not have an E-mail address, press the "Back to Event Listing" button below, select the event you wish to register for and then contact the event organizer.

E-mail Address
First Name
Next

- If the email address and first name are not already associated with an account, team members will be prompted to create a volunteer profile by completing an application form.

Create Volunteer Profile

 Based on the information provided, our records indicate that you do not have a volunteer profile in the CERVIS system. Please enter your information below to create a new profile or [CLICK HERE](#) to check for a profile under different E-mail address.

Thank you for creating your CCCNMO Volunteer Profile! We appreciate your patience as we verify your information. All adult volunteers (over 18 and no longer a high school student) must be Safe Environment/VIRTUS compliant. If you have not already completed this process with the Diocese of Jefferson City, please visit [VIRTUS Online](#). As part of this process, adult volunteers will be asked to consent to a criminal background check. A dedicated member of the CCCNMO team will be in touch soon to assist with the onboarding process. We look forward to serving with you!

* Indicates a required field

- If the email address and first name are already associated with an account, team members will be prompted to sign-in with a password. If the password is unknown, then select “Don’t Know Password/Reset Password.” This will initiate a temporary password to be emailed to the address on file. Volunteers who are still unable to access their account can

contact the CCCNMO Volunteer Services Coordinator directly at csmith-vandergriff@cccnmo.org to request assistance.

CCCNMO CERVIS Sign in

 Contact Us

 Based on the information provided, our records indicate that you already have a Volunteer profile in the CERVIS system. Please sign in below. If you don't know your CERVIS password or if you have not previously established a password for your CERVIS profile, please click the "Don't Know Password / Reset Password" link to proceed.

Remember my profile

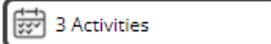
 Sign in with E-mail

[Don't Know Password / Reset Password !\[\]\(5f28a2d569b771723776e9894f2b7a55_img.jpg\)](#)

- Team members can access their CERVIS accounts by visiting the CCCNMO website or by visiting the CCCNMO CERVIS portal directly. It is recommended that volunteers save the link to their favorites/bookmarking the link in their preferred browser for quick accessibility.

VOLUNTEER PORTAL HOME

- After creating/accessing their CERVIS account, team members will be directed to the Volunteer Portal Home. This page contains links directing team members to a variety of volunteer options.
- The Volunteer Dashboard is located at the top of the page and displays the total number of hours served to date, the total number of activities registered for to date, and the total amount of time served with CCCNMO

 7 Hours  3 Activities  3 Months

 Volunteer Portal Menu 

Volunteer Portal Home

- Volunteers can return to the Volunteer Portal Home from any of the links listed below by selecting the Home icon at the top of the page or by selecting the Portal Home button.



< Portal Home

- Under the Volunteer Dashboard information is Registration Management. These links are used to register or apply for an opportunity, view or cancel an upcoming opportunity, record or update service project activity, and/or record or update a volunteer impact.

Registration Management

-  [Register / Apply for an Upcoming Opportunity](#)
-  [View or Cancel Registration for an Upcoming Opportunity](#)
-  [Record or Update Service Project Activity](#)
-  [Record or Update Volunteer Impact](#)

- Register/Apply for an Upcoming Opportunity – This link allows volunteers to select the name of the person they wish to register, select the event and/or time slot they wish to register for, then select “Register” at the bottom of the page. After successfully registering for an event, volunteers will receive an email confirmation with opportunity details. Volunteers will also receive an email reminder 1-2 days prior to the service opportunity. In addition to necessary details, both emails will contain a cancellation link and a mobile sign-in link. Options to cancel or sign-in to opportunities can also be found on your CERVIS Volunteer Portal Home Page by selecting “View or Cancel Registration for an Upcoming Opportunity.”

Step 1: Select a Volunteer Below 

Please select a volunteer: 

-  Show Opportunity Calendar
-  Use Private Registration Code
-  Search Opportunities by Interest, Location, Date or Keyword



- Step 2: Select an Available Opportunity Below 
- Front Desk & Office Assistance - Feb. 2022** 8 Needed
 Feb 21 - Feb 28, 2022 (Multiple Times Available)
 Catholic Charities of Central & Northern Missouri
- Housing & Donations Assistance - Feb. 2022** 12 Needed
 Feb 21 - Feb 28, 2022 (Multiple Times Available)
 Catholic Charities of Central & Northern Missouri

Select an Available Slot Below

<u>Date/Time & Details</u>	<u>Volunteers Needed</u>
<input checked="" type="checkbox"/> Mon, Feb 21, 2022 - 3:30 PM to 7:30 PM	3
<input type="checkbox"/> Wed, Feb 23, 2022 - 3:00 PM to 5:00 PM	3
<input type="checkbox"/> Fri, Feb 25, 2022 - 9:30 AM to 1:30 PM	3
<input type="checkbox"/> Sat, Feb 26, 2022 - 9:30 AM to 1:30 PM	4
<input type="checkbox"/> Mon, Feb 28, 2022 - 3:30 PM to 7:30 PM	4

Thank you for volunteering to serve with Catholic Charities of Central and Northern Missouri (CCCNMO). You have successfully registered for the event listed below. If you have any questions about this event please contact the event organizer using the contact information provided at the bottom of this message. You can also contact the CCCNMO Volunteer Services Coordinator by email at csmith-vandergriff@cccnmo.org.

Event Name: Food Pantry Client Assistance - Feb. 2022

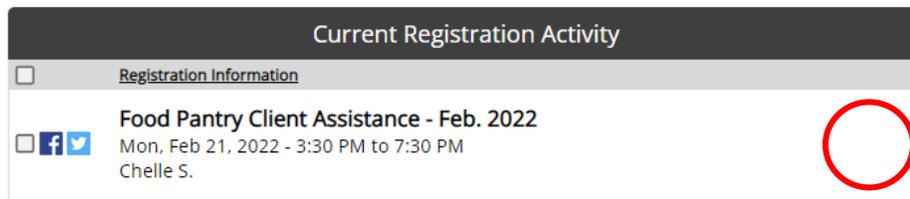
Event Date/Time: Mon, Feb 21, 2022 - 3:30 PM to 7:30 PM

Add to Calendar: [Google Calendar](#) / [iCal](#) / [Outlook](#)

Cancellation: If you are no longer able to participate in this slot, please click here to cancel your registration: [Cancel Registration](#)

Mobile Sign-in: You can use your mobile device to sign-in when you arrive and sign-out when you leave by clicking here: [Mobile Sign-in](#)

- View or Cancel Registration for an Upcoming Opportunity – This link allows volunteers to view all upcoming events they are registered for. To cancel a registration, select the box next to the desired opportunity and select “Cancel selected registration(s).” On the day of the event, volunteers will see a blue box containing the words “Sign-In” on the right-hand side of the opportunity. After the opportunity, volunteers will select the red box containing the words “Sign-Out” on the right-hand side of the opportunity. By selecting the blue and red boxes (or by using the mobile sign-in link from the email), volunteers will sign in and sign out of their service opportunity to record hours. If a volunteer does not sign in for an opportunity, CERVIS will automatically assign the full amount of hours scheduled for the opportunity. If adjustments need to be made volunteer hours, please contact the event organizer or the CCCNMO Volunteer Services Coordinator.



- Record or Update Service Project Activity – This allows volunteers to record hours for a service project (an ongoing volunteer opportunity without scheduled or regular shifts). Volunteers will be prompted to enter the date of service, total number of hours served, and a description of the services provided.
 - Volunteers will be prompted to select the name of volunteer who provided the service and the specific service project (volunteers may be enrolled in several). Volunteers will be required to record the service date and total number of hours attributed to the service project on that service date. The following information is required in the Notes field so that volunteer hours can be properly tracked/allocated:
 - CCCNMO Team Member Name
 - CCCNMO Supervisor Name
 - Assignment/Project Name
 - Brief Assignment/Project Description
 - Grant Allocation
- If the assignment involves direct client services, include the following additional information:
- Case/Client Number
 - Client Name (first/last names of all clients involved)

Step 1: Select a Volunteer Below

Chelle Smith-Vandergriff

Step 2: Select a Service Project Below

No Available Service Projects

Step 3: Enter your Activity Details Below

Service Date:*

Service Hours:*

Notes (1000 character max):

- Record or Update Volunteer Impact – This link allows volunteers to record specific trackable impacts associated with their service. These impacts will vary by program, organizer, and opportunity. One common impact that will need to be recorded is mileage driven.

Impact Logging Opportunities

Registration Information

Test Client Transportation - Case #00000
PSS - PC22 (AN#000000000)
 Fri, Feb 11, 2022 - 3:00 PM to 6:30 PM
 Catholic Charities of Central & Northern Missouri / Catholic Charities Refugee Services
 Samantha M.



- If the opportunity prompts a volunteer to log Client Attendance, enter 0 for the value. No additional documentation is required. This value will be only be entered by CCCNMO team members.
- When logging Boxes Delivered, no additional documentation is required.
- When logging Miles Driven, use the Notes section to provide a brief description of the transportation services provided (Example - Transported Mom and 6 children from residence to Battle Health Clinic, then back to residence).
- When logging Language Link Usage, use the Notes section to provide record of the Language Link Operator ID#, language selected, and the time the phone call was placed (Example - ID#0000, Pashto, 8:06am)
- Before leaving the Log Activity Impact screen, select Log Impact to save changes. Volunteers are able to enter or update Impacts at any time by following these steps.

Log Activity Impact
✕

Volunteer Name: Chelle Smith-Vandergriff
Event Name: Test Client Transportation - Case #00000

Miles Driven 15.00
 Enter the total number of miles driven. Use the Notes field to provide a brief description of the transportation services provided (who or what was transported, where, etc.).

Notes: (Optional)
Transported Mom and 6 children from residence to Battle Health

Language Link Usage 1.00
 Enter 0 if no interpreter was used. If interpretation services were used, enter the number of interpreters used. Use the Notes field to document the Language Link Operator ID#, language used, and time the call was placed.

Notes: (Optional)
ID#0000, Pashto, 8:06am

Log Impact
Cancel

- Under Registration Management, is Profile Management. These links are used to add additional family members to the volunteer’s profile (if a child is under the age of 14, a separate account will not need to be created), view or update profile information, and/or view their volunteer checklist.

Profile Management

- [Add Additional Volunteer to my Profile](#)
- [View or Update Volunteer Profile Information](#)
- [View Volunteer Checklist](#)

- Add Additional Volunteer to my Profile – This link allows volunteers to create a new volunteer profile associated with their account. While families can have multiple accounts linked (done automatically by a shared phone number or email address), volunteers can also choose to maintain separate accounts. Volunteers under 14 will not be able to set up an account, but rather will be required to serve with a parent/guardian.
- View or Update Volunteer Profile Information – This link allows volunteers to modify profile information and/or add a profile picture to personalize their account.
- View Volunteer Checklist – This link displays all completed, assigned, overdue, or expired checklist items for the volunteer, such as required trainings and documents.
- Under Profile Management, is Report Management. This link is used to view or print volunteer activity history. This will not be required by CCCNMO but may be helpful in the event that volunteers need to verify service hours to fulfill a work or school requirement.

Report Management

[View or Print Volunteer Activity History](#)

- This link allows volunteers to view their service hours for any desired period of time. Volunteers will select the desired time frame and then select Filter to display service opportunities and hours served.

Activity History for Chelle Smith-Vandergriff	
<input type="checkbox"/> Event Registration Information	<u>Service Hours</u>
Test Client Transportation - Case #00000	
<input type="checkbox"/> Wardrobe Visit - APA Thu, Feb 3, 2022 - 3:00 PM to 4:15 PM Catholic Charities of Central & Northern Missouri / Catholic Charities Refugee Services	1.25
Test Client Transportation - Case #00000	
<input type="checkbox"/> Vaccination Clinic - APA Fri, Feb 4, 2022 - 8:00 AM to 12:00 PM Catholic Charities of Central & Northern Missouri / Catholic Charities Refugee Services	4.00
Test Client Transportation - Case #00000	
<input type="checkbox"/> Food Bank Visit - RSS22 Mon, Feb 7, 2022 - 10:00 AM to 12:00 PM Catholic Charities of Central & Northern Missouri / Catholic Charities Refugee Services	2.00
Food Pantry Client Assistance - Feb. 2022	
<input type="checkbox"/> Sat, Feb 19, 2022 - 9:30 AM to 1:30 PM Catholic Charities of Central & Northern Missouri / Catholic Charities Health & Nutrition	4.00

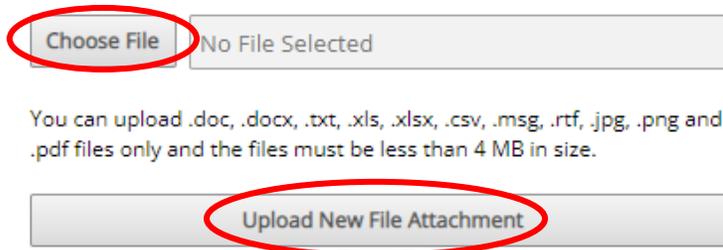
- Under Report Management, is Account Management. These links are used to change the account password or upload file attachments.

Account Management

[Change Password](#)

[Upload File Attachments](#)

- Change Password – This link allows volunteers to reset the password on their account. Volunteers will not be required to periodically reset their CERVIS password, but this can be done at any time. Passwords must contain between 10 and 30 characters and must contain at least 1 uppercase character, 1 lowercase character, and 1 number.
- Upload File Attachments – This link allows volunteers to upload files from their device directly into CERVIS. Accepted file types include .doc, .docx, .txt, .xls, .xlsx, .csv, .msg, .rtf, .jpg, .png and .pdf files. Files must be less than 4 MB in size.
 - Select Choose Files to access files saved on their device. After selecting the desired file, select Upload New File Attachment.



LEADERSHIP TEAM ACCESS LEVEL

- To switch to Leadership Team access level, which provides team members the ability to manage volunteers and create/manage opportunities, select the person icon at the top right of the CERVIS page. From the drop down menu, select to “Switch to Leadership Team Access Level.”
- After switching to the Leadership Team page of their CERVIS account, team members will see the Main Dashboard at the top of the page.
- Under the Main Dashboard are 4 management sections. Leadership Team access level allows team members full access to all components of the CERVIS portal and its data. Leadership Team does not have the ability to remove or delete information, but this access level will allow changes to be made to existing information. TEAM MEMBERS WILL NOT USE LINKS OR MAKE CHANGES TO ATTRIBUTE MANAGEMENT OR SYSTEM MANAGEMENT.

VOLUNTEER MANAGEMENT

- Under the Main Dashboard, is Volunteer Management. These links allow team members to add a new volunteer, search or manage the volunteer database, conduct an advanced search, and run data reports. The link for viewing/managing background checks is disabled as this is an add-on feature that CCCNMO is not currently utilizing. The link for volunteer follow-up will only be used by the CCCNMO Volunteer Services Coordinator and will not contain relevant information for team members.

Volunteer Management

-  [Add New Volunteer](#)
-  [Search / Manage Volunteer Database](#)
-  [Advanced Volunteer Search](#)
-  [View / Manage Background Checks](#)
-  [View / Manage Volunteer Follow-up](#)
-  [Report Management](#)

- Add New Volunteer – Team members will not typically use this link, but rather should instruct volunteers to create their own account by accessing the CCCNMO CERVIS portal. This will ensure all volunteers are properly onboarded prior to service.
- Search/Manage Volunteer Database – This link allows team members to search for volunteers by first or last name in the CERVIS database. After locating a volunteer, team members will be able to view/manage a variety of tasks by selecting Volunteer

Management icons. This includes managing and viewing profile information (including updating/editing options), registering a volunteer for opportunities, managing volunteer checklist, and sending an email.

Standard Options:

- Search by Volunteer First OR Last Name
- Search by Volunteer E-mail Address
- Search by Volunteer Tag
- Add New Volunteer

Advanced Options:

- Advanced Search
- Show All Active Volunteer Profiles
- Show Duplicate Volunteer Profiles
- Show Volunteers with File Attachments
- Show Volunteers with a Profile Photo

Volunteer Search Result Listing

<input type="checkbox"/> Actions	Name	E-mail Address	Phone
1.	Smith-Vandergriff, Chelle	csmith-vandergriff@cccnmo.org	573-415-7173

Send E-mail

Address Labels

Name Tags

PDF

Spreadsheet

Bulk Update

Bulk Register

- Manage Profile – This icon opens the volunteer profile and provides full access to managing a volunteer. Most of these options will not be used by team members on a regular basis. Several of these links also have corresponding quick access icons. The links that are only found on Manage Profile that will be used regularly by team members are:
 - Add/View Service Project Hours – This link opens the Service Project Participation Log. When this link is selected, team members will be instructed to select the specific service project (volunteers may be enrolled in several). Team members will be prompted to record the service date and total number of hours attributed to the service project on that service date. The following information is required in the Notes field so that volunteer hours can be properly tracked/allocated:
 - CCCNMO Team Member Name
 - CCCNMO Supervisor Name
 - Assignment/Project Name
 - Brief Assignment/Project Description
 - Grant Allocation
 If the assignment involves direct client services, include the following additional information:
 - Case/Client Number
 - Client Name (first/last names of all clients involved)

Service Project Participation Log -- Chelle Smith-Vandergriff

Volunteer Name: Chelle Smith-Vandergriff

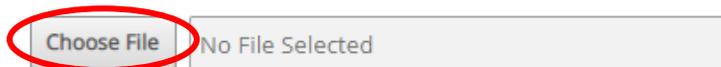
Service Project Name - Start Date: Please select a service project

Service Date:

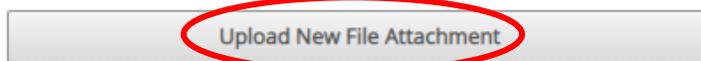
Service Hours:

Notes (1000 character max):

- View/Update File Attachments – This link allows team members to view and/or upload file attachments. Possible documents include VIRTUS training certificate, signed Code of Pastoral Conduct (signature page only), CCCNMO Driving Policy, CCCNMO Media Authorization, and/or copies of driver’s license and car insurance. Accepted file types include .doc, .docx, .txt, .xls, .xlsx, .csv, .msg, .rtf, .jpg, .png and .pdf files. Files must be less than 4 MB in size. Team members will select Choose Files to access files saved on their device. After selecting the desired file, select Upload New File Attachment. Team members should notify Volunteer Services Coordinator to file uploads so that Volunteer Profile and Checklist can be updated.



You can upload .doc, .docx, .txt, .xls, .xlsx, .csv, .msg, .rtf, .jpg, .png and .pdf files only and the files must be less than 4 MB in size.



- View Profile Details – This icon opens a read-only version of the Volunteer Profile Details. This option allows team members to quickly check volunteer information such as background check status, CCCNMO Driving Policy status, CCCNMO Media Authorization status, and more.
- Update/Edit Profile – This icon opens an editable version of the Volunteer Profile. Team members will not typically use this icon, but rather should instruct volunteers to make changes to their own account.
- Register for an Opportunity – This icon opens volunteer registration information, including options to register a volunteer for an opportunity and volunteer registration history, including past and upcoming events and hours served.

Register Chelle Smith-Vandergriff for Opportunity

Volunteer Name: Chelle Smith-Vandergriff

Opportunity Date - Name: Please select an opportunity below:

Reservation Code:

Registration Note:

Display activity between these dates: Start Date: 02/20/2021 End Date: 02/20/2023

Display Impact Type: Registrations / Hours

Registration History for Chelle Smith-Vandergriff (02/20/2021 - 02/20/2023)			
Date & Time	Opportunity	Service Hours	Notes
<input type="checkbox"/> Feb 21, 2022 3:00 PM	Food Pantry Client Assistance - Feb. 2022	4.00	
<input type="checkbox"/> Feb 19, 2022 9:30 AM	Food Pantry Client Assistance - Feb. 2022	4.00	
<input type="checkbox"/> Feb 7, 2022 10:00 AM	Test Client Transportation - Case #00000	2.00	
<input type="checkbox"/> Feb 4, 2022 8:00 AM	Test Client Transportation - Case #00000	4.00	
<input type="checkbox"/> Feb 3, 2022 3:00 PM	Test Client Transportation - Case #00000	1.25	
Total Service Hours:		15.25	

- Manage Checklist** – This icon allows team members to view volunteer checklist information. This includes assignment/completion of Safe/Environment/VIRTUS compliance, the CCCNMO Driving Policy, the CCCNMO Media Authorization, and Copy of Driver’s License and Car Insurance. Expiration dates will be assigned to the Copy of Driver’s License and Car Insurance so that CERVIS will prompt the volunteer when it is expired.

Checklist Items					
Item Status	Checklist Item	Due Date	Date Completed	Exp Date	Notes
Complete	Safe Environment/VIRTUS Compliant	01/08/2022 <input type="text"/>	01/07/2022 <input type="text"/>	(Optional) <input type="text"/>	(Optional) <input type="text"/>
Not Assigned	CCCNMO Driving Policy	<input type="text"/>	<input type="text"/>	(Optional) <input type="text"/>	(Optional) <input type="text"/>
Not Assigned	CCCNMO Media Authorization	<input type="text"/>	<input type="text"/>	(Optional) <input type="text"/>	(Optional) <input type="text"/>
Not Assigned	Copy of Car Insurance	<input type="text"/>	<input type="text"/>	(Optional) <input type="text"/>	(Optional) <input type="text"/>
Not Assigned	Copy of Driver's License	<input type="text"/>	<input type="text"/>	(Optional) <input type="text"/>	(Optional) <input type="text"/>

- Send Email Message** – This icon redirects team members to the Send Volunteer Email page in CERVIS.
- Advanced Volunteer Search** – This link allows team members to search for volunteers by selecting various parameters/measures and selecting Search Volunteer Database at the bottom of the page. If desired results do not display, consider widening search parameters.

- Report Management – This link allows team members to run a detailed report of volunteer hours and activity. Select desired dates of activity and desired report parameters. While there are many possible custom selections, it is recommended that team members use the option to Load Saved Report Parameters and select “Standard.” Once parameters have been set, select Run Report. The report will open in Excel as a .csv file.

CERVIS Report Dashboard

Reports will include activity between these dates: 01/20/2022 AND 02/20/2022 Format: Document

1. Custom Participation Report (Spreadsheet Only):

Query: All Volunteers All Opportunities Hide Group Activity All Registrations

Detail: High Group By: Volunteer

Report Field Selection:

- Volunteer Primary Phone
- Volunteer Alternate Phone
- Volunteer T-Shirt Size
- Volunteer Age Group
- Volunteer Birth Date
- Volunteer Age
- Volunteer Gender

Run Report

Load Saved Report Parameters

Please select the saved report parameters below to load:

Clear All Selected

Standard

= Public Saved Parameters

Load Selected Parameters Cancel

OPPORTUNITY MANAGEMENT

- Next to Volunteer Management, is Opportunity Management. These links allow team members to add a new opportunity and search or manage existing opportunities. The other links displayed will only be used by the CCCNMO Volunteer Services Coordinator and will not contain relevant information for team members.



Opportunity Management



Add New Opportunity



Search / Manage Existing Opportunities



Reservation Management



Impact Tracking Management



Sign-in Console / Kiosk

- Add New Opportunity – This link allows team members to create a new opportunity. This may be necessary in some cases but should be avoided if there is an existing opportunity that can be duplicated (copied) and reworked. Duplicating an existing opportunity reduces the amount of work and creates consistency.
 - Opportunity Type – There are three types of opportunities:
 - Normal Event – A Normal Event should be used for one-time, scheduled opportunities. Because there is a scheduled start and end time, as well as a total number of hours allowed for the opportunity, CERVIS will track service hours even if a registered volunteer forgets to sign-in for the opportunity.
 - Time Slot Event – A Time Slot Event should be used for recurrent, scheduled opportunities. Because there is a scheduled start and end time, as well as a total number of hours allowed for the opportunity, CERVIS will track service hours even if a registered volunteer forgets to sign-in for the opportunity. Team members will select the total number of slots for each opportunity when scheduling opportunity details. The Notes section for each time slot will be used to include event specific details.
 - Service Project – A Service Project should be used to track sporadic, unscheduled opportunities that are subject to change both in time frame and task. Because there is no scheduled start and end time, no total hours, and no event description, volunteers or team members must log service project details and applicable impacts every time hours are served.
 - Opportunity Name – The name of the opportunity should reflect the specific task so that volunteers have a clear idea of what is being requested.
 - Opportunity Description – The description of the opportunity should provide an explanation or overview of the service opportunity and volunteer role and include specific task instructions or known details.
 - Start Time – The start time of the event is the time that volunteers need to arrive onsite to begin their service. If additional preparation or orientation is needed, this should be built into the service start time. It is good practice to add an additional 15 min. (at least initially) to allow time for delays and introductions. This selection is only available for Normal Events; details will be entered differently for Time Slot Events and Service Projects.
 - End Time – The end time of the event is the time that volunteers can expect to sign-out and leave the service site. If additional cleanup, paperwork, or debriefing is needed, this should be built into the service end time. It is good

practice to add an additional 15 min. (at least initially) to allow time for delays. This selection is only available for Normal Events; details will be entered differently for Time Slot Events and Service Projects.

- Service Credit Hours – The service credit hours are the total hours between the start and end time. This selection is only available for Normal Events; details will be entered differently for Time Slot Events and Service Projects.
- Log Service Project Hours – This selection is only available for Service Projects. The default selection for this option is Admin Only. Selecting other options allows volunteers to enter their own service hours. The preferred selection for most opportunities is Admin Only unless volunteers have been trained on logging service project hours.
- Number of Volunteers Needed – The number of volunteers needed can be entered as 0 if the number of volunteers requested is unlimited, however most opportunities should have a number other than 0 listed. This number should reflect the maximum number of volunteers needed to complete the task. This selection is only available for Normal Events and Service Projects; details will be entered differently for Time Slot Events.
- Allow Waitlist When Registration is Full – The default selection for this option is No. Selecting Yes enables a waitlist in the event the maximum number of volunteers is filled and one of registered volunteers is unable to fulfill their duties.
- Organizer – The primary organizer will be responsible for managing the opportunity start to finish.
- Secondary Organizer – Each primary organizer will elect a secondary organizer who will take over in the event the primary organizer is ill, out of the office, is unavailable, etc. Sometimes this will be the primary organizer's direct supervisor and sometimes it will be another team member.
- Meeting Location – The meeting location is the name of the business or agency location.
- Meeting Location Address – The meeting location address should include the street number and street name, office/apt./suite number, city, state, and zip code. A volunteer should be able to enter this information directly into a navigation app or GPS device to get directions. Selecting the yellow navigation pin (Load Location) icon will allow team member to load a previously saved location.
- Allow Mobile Volunteer Sign-In – The default selection for this option is No. Selecting another option allows volunteers to sign-in via their mobile device. The preferred selection for most opportunities is Yes – Any Location.
- Send Automatic Reminder Email – The default selection for this option is No. Selecting another option enables CERVIS to send registered volunteers an automated email prior to the service opportunity. The required selection for all opportunities is 2 Days Prior.
- Send Automatic Thank You Email – The default selection for this option is No. Selecting another option enables CERVIS to send volunteers an automated email thanking them for their service and providing the link for the Volunteer Feedback Survey. The required selection for all opportunities is Yes – Signed In.
- Interest Category – The default selection for this option is Catholic Charities of Central & Northern Missouri. This selection should not be changed.
- Secondary Interest Category – Options for the secondary interest category are the five main Catholic Charities programs. Select the most appropriate program to correctly categorize opportunities.

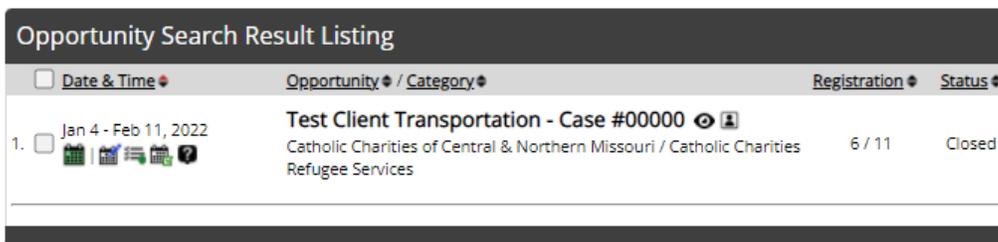
- Enable CERVIS Quick-Reg – The default selection for this option is No. This selection should not be changed due to the CCCNMO onboarding requirements.
- Opportunity Status – The default selection for this option is Open. This selection should not be changed unless an opportunity is being created after the event start and end time.
- Publish Online – The default selection for this option is No. Selecting another option makes the opportunity visible to volunteers on the CCCNMO CERVIS portal. The recommended selection is Yes – Open.
- Assign Managing Group – Modification is typically not needed for this option.
- Display Opportunity Contact Information – The default selection for this option is Event Organizer. This selection should not be changed.
- Allow Organizer(s) to Modify Opportunity Details – The default selection for this option is No. This selection does not need to be changed because all team members have Leadership Team access level, which allows them the ability to modify opportunity details.
- Notify Organizer(s) of Completed Registrations – The default selection for this option is No. Selecting another option enables CERVIS to send the organizer(s) an automated email when a volunteer registers for a service opportunity. The required selection for all opportunities is Yes.
- Notify Organizer(s) of Canceled Registrations – The default selection for this option is No. Selecting another option enables CERVIS to send the organizer(s) an automated email when a volunteer cancels registration for a service opportunity. The recommended selection for all opportunities is Yes.
- Send Reminder E-mail to Organizer(s) – The default selection for this option is No. Selecting another option enables CERVIS to send the organizer(s) an automated email prior to the service opportunity. The required selection for all opportunities is 2 Days Prior.
- Display the following items on the sign-in sheet for this opportunity – The default selection for this option is volunteer name, phone, and email. Selecting other options customizes the sign-in sheet. Unless a sign-in sheet will be printed and utilized for the event, selecting additional options is unnecessary.
- Gender Restriction – The default selection for this option is No Restriction. Selecting another option will restrict the ability of some volunteers from registering for the opportunity. Unless the service opportunity is restricted to a specific gender, selecting another option is unnecessary.
- Age Restriction – The default selection for this option is no restriction. Selecting a minimum age requirement will restrict the ability of some volunteers from registering for the opportunity. The selection will vary by program, department, and opportunity.
- Custom Field Restriction(s) – The default selection for this option is no restriction. Selecting other options will restrict the ability of some volunteers from registering for the opportunity. The required selection for all opportunities is Background Check Status (Completed, N/A (waived), N/A (not required for minors)).
- Require [Any/All] of the Custom Field Selections – The default selection for this option is Any. Selecting Any will allow volunteers with any of the selected restrictions register for the opportunity. Selecting All will only allow

volunteers who have all the requirements register for the opportunity. The required selection for all opportunities is Any.

- Limit Visibility using Custom Field Restriction(s) – The default selection for this option is No. Selecting Yes will restrict visibility of this opportunity from anyone who does not have the designated custom field selections. The required selection for all opportunities that contain client information (including case number) is Yes.
- Checklist Item Restriction(s) – The default selection for this option is no restriction. Selecting other options will restrict the ability of some volunteers from registering for the opportunity. The required selection for all opportunities is Safe Environment/VIRTUS Compliant.
- Require [Any/All] of the selected Checklist Items – The default selection for this option is Any. Selecting Any will allow volunteers with any of the selected restrictions register for the opportunity. Selecting All will only allow volunteers who have all the requirements register for the opportunity. The required selection for all opportunities is Any.
- Limit Visibility using Checklist Item Restriction(s) – The default selection for this option is No. Selecting Yes will restrict visibility of this opportunity from anyone who does not have the designated checklist item selections. The required selection for all opportunities that contain client information (including case number) is Yes.
- Group Membership Restriction(s) – The default selection for this option is no restriction. Selected groups will appear in this field after adding the allowed group.
- Add Allowed Group – Selecting a group or groups will restrict the ability of some volunteers from registering for the opportunity. Use of group restrictions is recommended for all opportunities that have program specific training requirements.
- Require [Any/All] of the selected Groups – The default selection for this option is Any. Selecting Any will allow volunteers with any of the selected restrictions register for the opportunity. Selecting All will only allow volunteers who have all the requirements register for the opportunity. The required selection for all opportunities that have group restrictions is Any.
- Limit Visibility using Group Membership Restriction(s) – The default selection for this option is No. Selecting Yes will restrict visibility of this opportunity from anyone who is not a member of the selected group(s). The required selection for all opportunities that have group restrictions is Yes.
- Registration Restriction Failure Message (Optional) – Entering text in this field will customize the restriction failure message. The following custom failure messages are required:
 - Opportunities that do not involve transportation – Thank you for your willingness to serve with CCCNMO! All volunteers must be Safe Environment/VIRTUS compliant in order to register for a service opportunity. For adults (18+ and no longer a high school student), this includes completion of a criminal background check. If you have recently created a Volunteer Profile, please be patient while we verify your information.
 - Opportunities that involve transportation – Thank you for your willingness to serve with CCCNMO! All volunteers must be Safe Environment/VIRTUS compliant in order to register for a service opportunity. For adults (18+ and no longer a high school student),

this includes completion of a criminal background check. As a reminder, all drivers must be 18+ and in compliance with the CCCNMO Driving Policy. If you have recently created a Volunteer Profile, please be patient while we verify your information.

- Allow Registration Restriction Override – The default selection for this option is No. Selecting Yes will allow volunteers with a registration code to bypass registration restrictions. This selection should not be changed due to the CCCNMO onboarding requirements.
 - Additional Information for Confirmation/Reminder E-mail Message – Entering information in this field will customize the information sent to volunteers when they register for an event. This information may include the organizer’s preferred means of contact, regular hours, etc.
 - Private Notes – This information is not sent to volunteers, but rather can be used internally to annotate opportunity specific details that are needed for internal coordination or communication purposes. Use of this section is strongly recommended, especially for transportation appointments.
 - Log Opportunity Impact – The default selection for this option is Admin Only. Selecting other options will change the ability of volunteers to log selected impacts. The required selection for all opportunities is Both.
 - Impact tracking items associated with this opportunity – The default selection for this option is none. Selecting other options will allow volunteers to log relevant opportunities, which can be included when running a report. Impact selection will vary by program, department, and opportunity.
 - The remaining opportunity settings will not typically be manipulated by team members.
 - When all selections have been entered and double-checked, select Create Opportunity at the bottom of the page.
- Search/Manage Existing Opportunities – This link allows team members to search and manage existing opportunities. To locate an existing opportunity, type a keyword into the search bar and select Enter. Select the title of the desired opportunity from the list displayed. After selecting the opportunity, team members will have the option to add opportunity tags, update opportunity information, manage time slots (if the opportunity is a Time-Slot Event), view/update opportunity photo, register volunteers/group, view registered volunteers or groups, send email to registered volunteers, print sign-in sheets, nametags, and mailing labels, view/update file attachments, and duplicate the opportunity.



- Opportunity Tags – The default selection for this option is No Tags Assigned. Selecting Add Opportunity Tag allows team members to tag the opportunity with specific information. CCCNMO will use opportunity tags to track grant/funding sources. Multiple tags can be added to each opportunity.

- Update Opportunity Information – Team members can edit/update opportunity information. After making changes, select Update Opportunity at the top or bottom of the page.
- Manage Time Slots – Team members can edit/update time slot details (if the opportunity is a Time-Slot Event). Options including adding or deleting time slots. After making changes, select Update Time Slot Information at the top of the page.
- Manage Custom Registration Questions – The link for custom registration questions will only be used at the direction of the CCCNMO Volunteer Services Coordinator.
- View/Update Opportunity Photo – This link allows team members to upload a photo to the opportunity. Because this image will be viewed by the larger public, please consult the Catholic Charities Director of Communications prior to selecting an image. Accepted file types include .jpg, .jpeg, .gif, or .png file only and the image file must be less than 5MB in size.
- Register Volunteers/Groups – This link allows team members to register a volunteer or group for an opportunity.
 - To register a volunteer – Search and select the name of the desired volunteer, then select Register Volunteer or Group. For Time Slot Events, additional selections will apply. Select Complete Registration to finalize registration.
 - To register a group – Search and select the name of the desired group, then select the number of desired participants to register. This selection is ideal for church, school, or corporate groups where individual volunteer names are not required. For Time Slot Events, additional selections will apply. Select Complete Registration to finalize registration.
- View Registered Volunteers/Groups – This link allows team members to view and manage registered participants. Options include unregistering, signing-in, and signing out volunteers, as well as marking volunteers as no shows and logging impacts.
- Send Email to Registered Volunteers – This link allows team members to send automated or manual emails to registered volunteers.
- Print Sign-In Sheet – This link allows team members to print a sign-in sheet based on registered volunteers.
- Print Name Tags – This link allows team members to print name tags based on registered volunteers.
- Print Name Tags – This link allows team members to print mailing labels based on registered volunteers.
- Print Summary – This link allows team members to print opportunity summary based on registered volunteers and volunteer details.
- View/Update File Attachments – This link allows team members to upload file to an opportunity. Attachments could include policies, procedures, directions, parking details, etc.
- Duplicate Opportunity in CERVIS – This link creates a copy of an existing opportunity. Team members can edit/update opportunities instead of creating new opportunities. Many setting selections will transfer, but team members should always double-check DMV before posting:
 - Date/time
 - Mobile Sign-In
 - Visibility Restrictions

Catholic  Charities
of Central and Northern Missouri
Providing Care...Creating Hope