

# Volunteers

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## Add a Volunteer

To add a new **Volunteer** to Polixen, click the **Administration** link in the menu and select **Volunteers**. Then click the **New Volunteer** button.

<a href="#">Home</a> > Volunteer Admin				
<a href="#">Availability Roster</a> <a href="#">Advanced Search</a> <a href="#">Bulk Suspensions</a> <input type="text" value="Volunteer Search ..."/>				
<b>Volunteers</b> > List Volunteers				
<input type="text" value="Select Some Options"/>		<input type="text" value="Active Only"/>		<input type="button" value="New Volunteer"/>
	Name	Phone	Email	All Roles
	, Julia Kathryn			
	Ahearn, Judith			
	Allen, Bill			

On the New Volunteer page, you'll have to enter the volunteer's **First and Last Name**, **Date of birth** and **Address**. If you have the rest of their information, you can enter it here as well - if not, you can update it later on.

[Home](#) > [Volunteers](#) > New Volunteer

\* Required Fields

## New Volunteer

Volunteer Details

* First Name:	<input type="text" value="First name..."/>	* Last Name:	<input type="text" value="Last name..."/>	* Date of Birth:	<input type="text" value="Date of birth..."/>
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Contact Information

Email:	<input type="text"/>	Mobile Number:	<input type="text"/>
Work Number:	<input type="text"/>	Home Number:	<input type="text"/>

Address Information

* Address Line 1:	<input type="text"/>	* State:	<input type="text" value="Please S"/>	* Suburb:	<input type="text" value="Please Select"/>
Address Line 2:	<input type="text"/>	* Postcode:	<input type="text"/>		

Once you've entered their information, click the **Create Volunteer** button.

Additional Information

Usual delivery role/position:	<input type="text" value="None"/>
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Services:

Comments & Notes:

Volunteer State:

\* Commencement Date:

Termination Date:

Create New Volunteer

## View and Update Volunteers

To **View** and **Update** a volunteer, click the **Administration** link in the menu and select **Volunteers**. On this Volunteer page, you'll see a list of all the volunteers in your system.



You can search for a particular volunteer, or filter the visible volunteers, by using the **Volunteer Search Fields** up the top. You can use the volunteer's **name**, the **service** they're part of, their **status** (active/inactive), or the **job roles** they've been assigned to as filters.

Availability Roster

Advanced Search

Bulk Suspensions

Volunteer Search ...

Select Some Options

Active Only

New Volunteer

To view the details of a particular volunteer, click the blue **Information** button next to their name. This will take you to their Volunteer Page.

On this page, you can update their information. Once you've entered all the information, click the **Save Changes** button to apply your changes.

[Home](#) > [Volunteers](#) > [Julia Kathryn](#) > Edit Details
 

Save Changes

Julia Kathryn (#144)

Volunteer Information

Job History

Training

Documents & Files

Notes

Actions

Volunteer Information

<div>* First Name:</div> <div>Julia Kathryn</div>	<div>* Last Name:</div> <div></div>	<div>* Date of Birth:</div> <div>30/01/2014</div>
<div>Preferred Name</div> <div>Preferred Name...</div>		

## Volunteer Files

When you're on a volunteer's **Volunteer Page**, click the **Documents & Files** tab to view their Files Page. On this page, you can **upload** files to Polixen for this volunteer (eg: forms they've filled in). You can **download** the files again to view them, and you can **delete** any uploaded files.

Julia Kathryn (#144)

Volunteer Information

Job History

Training

Documents & Files

Notes

Actions

Documents & Files

New File

☐ View Archived

Category	Description	Filename	Date	Archive	
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Save Changes

Delete Volunteer

To **Upload** a new file, click the **New File** button. On the New File Popup, select the **file** on your computer you'd like to upload. Enter a **description** so you can find the file later, and click the **Upload** button to finish the process.



## Volunteer Notes

When you're on a volunteer's **Volunteer Page**, click the **Notes** tab to view their Volunteer Notes page.

Julia Kathryn (#144)

Volunteer Information	Job History	Training	Documents & Files	Notes	Actions ▾
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Notes

New Note

ⓘ	User	Date	Subject	Note	🗑
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✎ Save Changes

🗑 Delete Volunteer

On the **Notes Page**, you can **Add**, **Update** and **Delete** volunteer Notes.

To **Add** a new note, click the **New Note** button on the top right side. Enter your note details and click the **Add Note** button to save it.



## Add Note For Julia Kathryn

Subject:

Awards



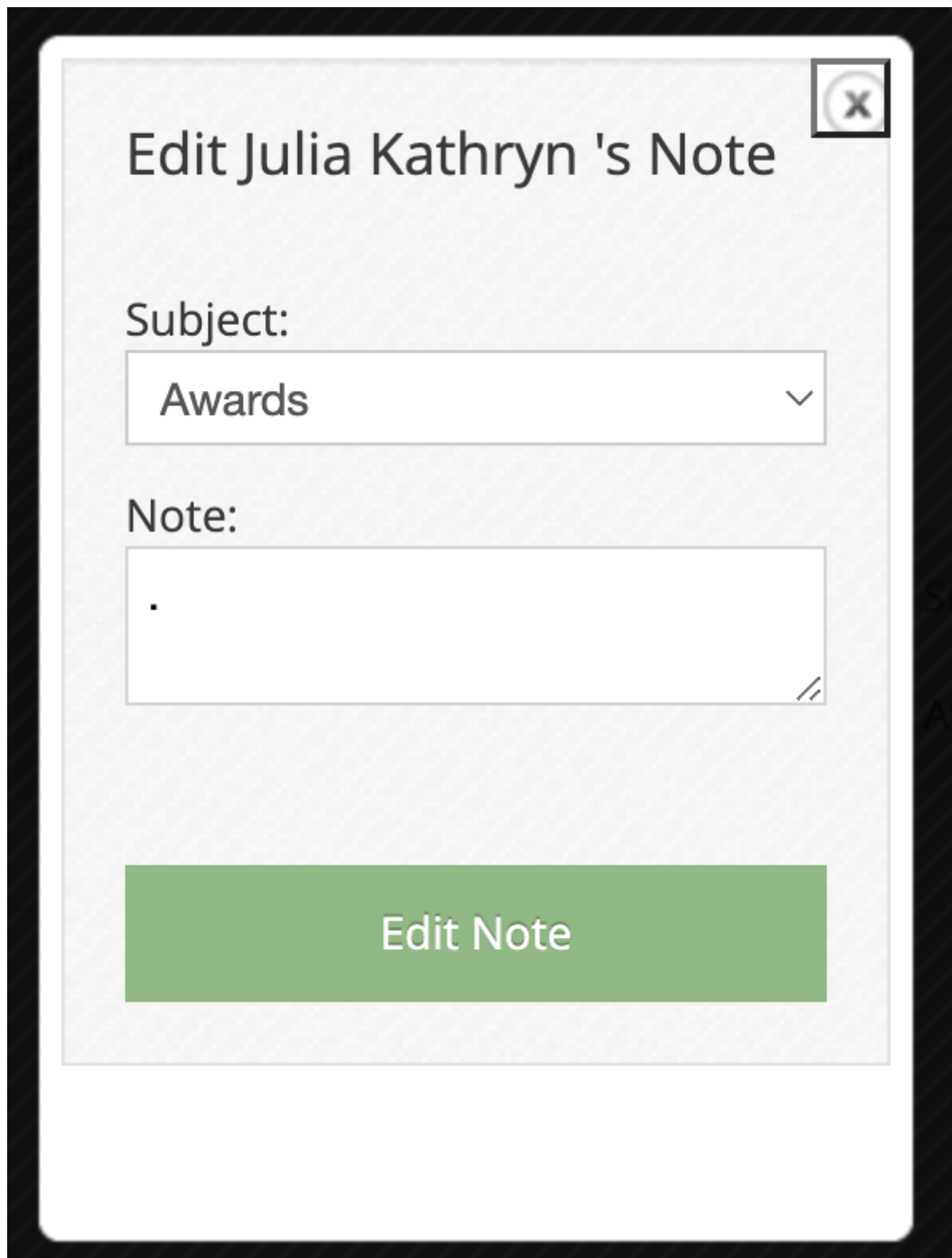
Note:

Add Note



Add Note & Notify

To **Edit** a note, click the blue **Information** button on the left side. Update the note and click the **Edit Note** button to save it.







The screenshot shows a mobile application interface for editing a note. At the top, the title 'Edit Julia Kathryn 's Note' is displayed in a large, dark font. To the right of the title is a small square button with a white 'X' on a dark background. Below the title, there is a 'Subject:' label followed by a white dropdown menu with a grey border. The dropdown menu currently shows the word 'Awards' and a small downward-pointing chevron icon on the right. Below the subject field is a 'Note:' label followed by a large white text area with a grey border. The text area contains a single bullet point and a small icon of two overlapping lines in the bottom right corner. At the bottom of the form is a large, solid green rectangular button with the text 'Edit Note' in white, centered.

To **Delete** a note, click the **Trash** button on the right side.

## Notes

[New Note](#)

	User	Date	Subject	Note	
	Admin User	07/09/2022 01:42 PM	Awards	.	

## Volunteer Training

On the **Training Page**, you can **Add**, **Update** and **Delete** records of a volunteer's training session. You can use these to track mandatory training volunteers have to take, or induction periods.

Julia Kathryn (#144)

Volunteer Information

Job History

Training



Documents & Files


Notes


Actions

Volunteer Training History

New Training

	Date	Title	Category	Duration	Notes	Complete	
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 Save Changes

 Delete Volunteer

To **Add** a new training note, click the **New Training** button. Enter the date and name of the training session, and click the **Add Training** button to save it.



## Add Training

To **Edit** a training note, click the blue **Information** button next to it. Update the date or name of the training session, and click the **Edit Training** button to save it.





This page lists the times a volunteer has been assigned to a Job in the **Job Roster**. It lists the **name** of the job, the **service type** of the job, and the **date** of the job.

You can **filter** the jobs that are displayed by using the **Date Filter** at the top of the page.

Julia Kathryn (#144)

Volunteer Information	Job History	Training	Documents & Files	Notes	Actions ▼
Jobs History		Start : 08/08/2022	END : 07/09/2022	Update	
Job Name	Service Type(s)	Date	Duration		
No Jobs Found Within Date Range Specified					

 Save Changes

 Delete Volunteer

## Volunteer Suspensions

There are two kinds of volunteer suspensions: **Individual Suspensions** and **Bulk Suspensions**.

### Individual Suspensions

For individual suspensions, navigate to the volunteer's **Volunteer Page**. Scroll down and click the **Suspensions** button. This will take you to a list of suspensions for that volunteer.

Volunteer Details

Services: Select Some Options	Volunteer State: ACTIVE ▼	Suspensions	
* Commencement Date: <input type="text"/>	Termination Date: <input type="text"/>	Last Review Date: <input type="text"/>	Next Review Date: <input type="text"/>
Comments & Notes: <input type="text"/>		Medical Information: <input type="text"/>	

To **Add** a new suspension, click the **New Suspension** button. Fill in the **start** and **end** dates of the suspension, enter some **notes** for the suspension, and click the **Create New Suspension** button to save it.

## New Volunteer Suspension: Julia Kathryn

Start:	<input type="text" value="dd/mm/yyyy"/>
End:	<input type="text" value="dd/mm/yyyy"/>
Notes:	<div><div></div></div>

Create New Suspension

To **Edit** an existing suspension, click the blue **Information** button next to the suspension. Change the dates, and click the **Edit Suspension** button to save it.



 [Home](#) > [Volunteers](#) > [Julia Kathryn](#) > Edit Suspension

## Edit Volunteer Suspensions

Start:	<input type="text" value="08/09/2022"/>
End:	<input type="text" value="29/09/2022"/>
Notes:	<div><div>test</div></div>

Edit Suspension

To **Delete** a suspension, click the red **Trash** button on the right-hand side.

	Start	End	Notes	
	Thursday 8th of September 2022	Thursday 29th of September 2022	test	

## Bulk Suspensions

To get to the **Bulk Volunteer Suspensions** page, navigate to the main Volunteers page, then click the blue **Bulk Suspensions** button at the top of the page.

[Home](#) > Volunteer Admin

[Availability Roster](#)
[Advanced Search](#)
[Bulk Suspensions](#)

[Volunteers](#) » List Volunteers

To **Add** a new bulk suspension, click the **New Suspension** button. Fill in the **name** of the suspension, the **start** and **end** dates, and any optional **notes**, and click the **Create Suspension** button to save it.

Please note: this suspension will affect all staff and volunteers.

<b>Name:</b> <input type="text" value="Suspension Name"/>	<b>Start Date:</b> <input type="text" value="dd/mm/yyyy"/>	<b>End Date: (Optional)</b> <input type="text" value="dd/mm/yyyy"/>
<b>Notes:</b> <div></div>		

To **Edit** a suspension, click the blue **Information** button next to it to view and update it. Here you can also add Volunteers to be exempted from the suspension.

Once you've changed the information, click the **Edit Suspension** button to save your changes.

Name: <input type="text" value="test1"/>	Start Date: <input type="text" value="08/09/2022"/>	End Date: <i>(Optional)</i> <input type="text" value="29/09/2022"/>
Notes: <div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div>		

## Exemptions

Staff or Volunteer <input type="text" value="Adam White"/>	<input type="button" value="Add Exemption"/>
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## Volunteer Delivery Roles

On the volunteer's page, you can add in their **Default Delivery Role**, as well as other Roles they may be assigned. To do this, go to the **Volunteer Information** tab and scroll down to **Additional Information**. There you can select their Default Delivery Role.

These are used on the **Run Roster** – when assigning a volunteer to a run, their default role will be automatically selected.

## Additional Information

Default delivery role/position: <input type="text" value="Driver"/>	Registered Driver: <i>Only registered drivers will have their drivers licence and car insurance appear in the Document Expiry report.</i> <input type="text" value="NO"/>	Delivery roles: <input type="text" value="Assistant"/>
Primary Language <input type="text" value="Please Select"/>	Additional Languages <input type="text" value="Select Some Options"/>	Country of birth <input type="text" value="Please Select"/>
Profile <input type="text"/>	Referral: <input type="text"/>	

## Create new roles

To create new **Roles**, click on **Administration** in the Main Menu, then select **Polixen Data**, then **Roles** to be taken to the Roles Page. On the Roles Page, click the **New Role** button to create a new delivery role, or click the **Information** button next to an existing role to update or delete it.



## New Role

Role Name	<input type="text" value="Role name"/>
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 Create New Role