# Volunteers

## 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.



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.

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



# 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.

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.



# 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.



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.

To **Download** an existing file, click its **filename** in the Files list. This will automatically download the file to your computer, where you can view it.

To **Delete** a file, click the **Trash** button next to its name.

# Volunteer Notes

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



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.
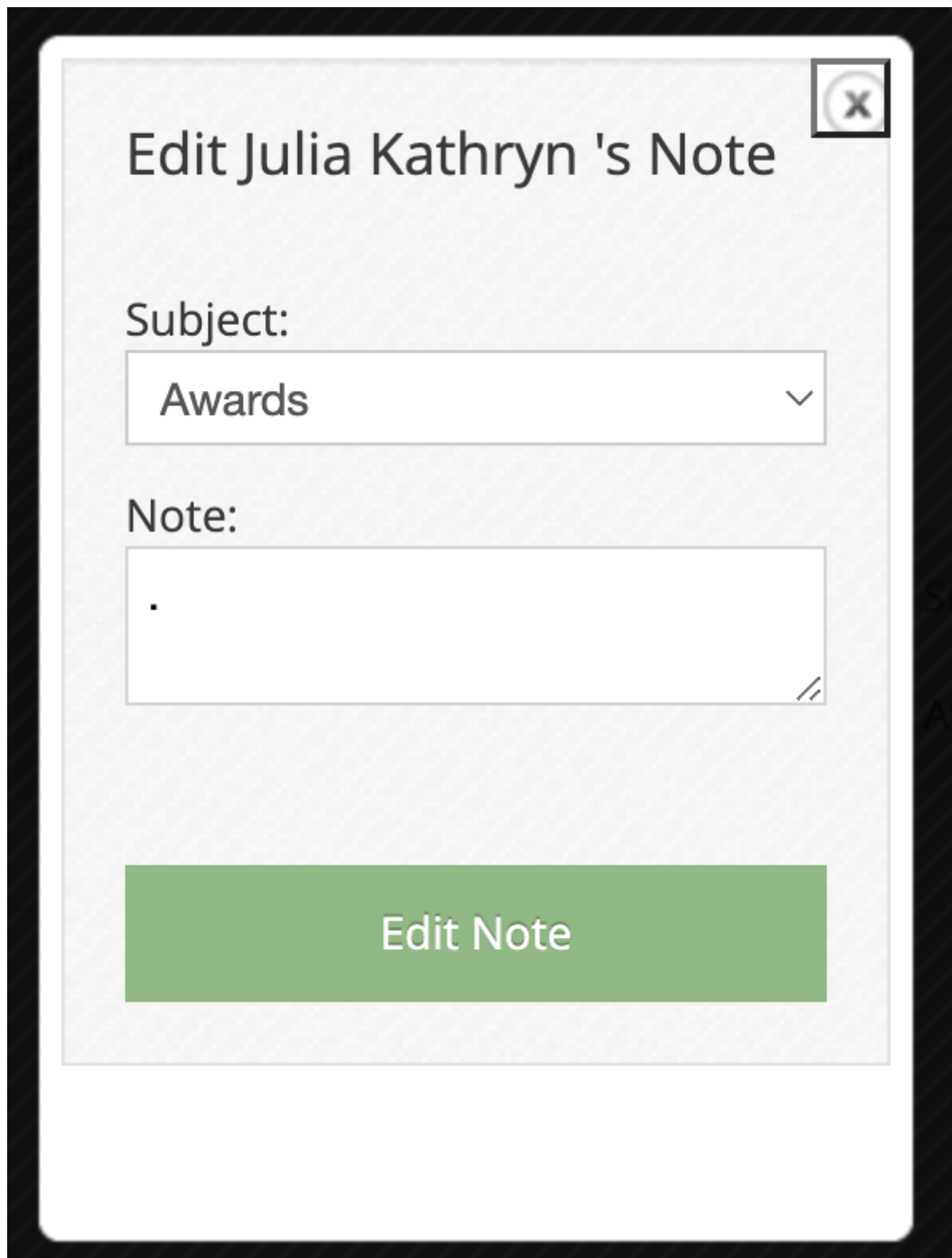
## Add Note For Julia Kathryn

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.



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 | 🗑 |
|---|---|---|---|---|---|---|---|

✎ 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 Session For Julia Kathryn

Title:

Date:

Category:

Blue Card QLD

Duration:

External Training: ☐
Training Complete: ☐

Notes:

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.

To **Delete** a training note, click the **Trash** button next to it.

| | Date | Title | Category | Duration | Notes | Complete | 🗑 |
|---|---|---|---|---|---|---|---|
| ℹ | 08/09/2022 | test | Certificates | | | Yes | 🗑 |

Volunteer Training History — New Training

# Volunteer Job History

To view a Volunteer's job history, navigate to the volunteer's **Volunteer Page** and click the **Job History** tab.

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.



# 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.



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:

dd/mm/yyyy

End:

dd/mm/yyyy

Notes:

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:

08/09/2022

End:

29/09/2022

Notes:

test

Edit Suspension

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

## 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.



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.



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.

# **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.



# **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 | Role name |
|---|---|

**✎ Create New Role**