Our Future: Built Better Together

Volunteer Management System (VMS) User Guide
About this User Guide

Each line in the Table of Contents is hyperlinked to that specific topic within the User Guide. Screenshots are provided for each step. See Additional Resources for VMS tutorial video links and other helpful resources.

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FIRST is a global robotics community that prepares young people for the future.
Log In

Volunteer Management System

The Volunteer Management System (VMS) supports all of the FIRST programs. The Volunteer Management System is designed to assist in management of event volunteers.

If you are an authorized user, please log in using your FIRST Portal User account e-mail and password.

If you would like to volunteer for an event, please visit the Volunteer Information Matching System website.

• Login with your email and password, which are the same credentials as your account on firstinspires.org.

• Each season users are prompted to sign the VMS Terms & Conditions. This is required to use the system for the current season.

• If you manage more than one event, you will be taken to My Dashboard. If you are managing just one event, you will go directly into the Event Detail page of that event.

Note: Access to VMS for Volunteer Coordinators is seasonal, and expires at the end of each FIRST season (Typically May of each year). Volunteer Coordinators must be assigned to an event each season by FIRST HQ or a Program Delivery Partner in order to regain access.
VMS Page Overviews

The Dashboard provides high level information on the status of staffing events with volunteers.

- **Start Date** – First day of competition.
- **Days** – Length of competition.
- **Program** – FIRST program.
- **Event Target Assignments** – The # of volunteers for this event suggested by Headquarters. Some roles may show a target of “0”. You can change the target to adjust to the needs of your event.
- **Volunteers Assigned** – Total # of volunteers assigned to the event.
- **Tentatively Assigned** - # of volunteers that are “Tentatively” scheduled for a role. These individuals have not been notified and are not assigned within the system.
- **Unassigned Applicants** - # of Applicants who have applied to this event.
- **( # new)** – an applicant is designated as “new” for 10 days from the time they have submitted their application.
- **Registered Teams** – this number is pulled if the event registers this data with HQ. If this is not collected, this number will remain “0”.

From the Dashboard, click on the event name to begin making assignments.
### Event Details

**NH FTC Meet 2 - FTC**

Manchester, NH  September 4, 2020  Season: 2020 - TBD (FTC)

<table>
<thead>
<tr>
<th>Event Role</th>
<th>Role Target</th>
<th>Total Volunteer Assignments</th>
<th>Tentatively Assigned</th>
<th>Unassigned Applicants</th>
<th>Daily Target Reached</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Technical Advisor</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>F</td>
</tr>
<tr>
<td>Head Referee</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>1 (1 new)</td>
<td>F</td>
</tr>
<tr>
<td>Lead Robot Inspector</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>F</td>
</tr>
<tr>
<td>Lead Scorekeeper</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>F</td>
</tr>
<tr>
<td>Volunteer Coordinator</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>F</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Event Role</th>
<th>Role Target</th>
<th>Total Volunteer Assignments</th>
<th>Tentatively Assigned</th>
<th>Unassigned Applicants</th>
<th>Daily Target Reached</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign Me As Needed</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>F</td>
</tr>
<tr>
<td>Concession Stand</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>F</td>
</tr>
</tbody>
</table>

### Event Volunteer Roles

Each event type is populated with a set of volunteer roles as determined by each program at FIRST Headquarters. The roles are divided into Key Roles and Non-Key Roles. The purpose of this is to ensure that you fill the most critical roles for the event.

- **Manage Custom Roles** – See [How to Make a Custom Role](#)
- **Manage Volunteer Coordinators**
  - This button is grayed out unless you have Partner or Manager Permissions.
  - As a Partner, you can assign Volunteer Coordinators for all events in your region.
- **Role Target** – Total # of volunteers needed for this role.
- **Daily Target Reached** (*Hint: The letters stand for days of the week*)
  - Yellow – Suggests that more volunteers may be needed.
  - Green – Target number of volunteers have been met.
All Reports Tab
- Location of all reports that can be pulled for the event.
- You may view reports in VMS and export to excel (follow all FIRST Data Privacy rules).

Messaging Tab
- Send email messages to groups of volunteers (Judges, Referees, Game Announcers, etc.).
- This is a one-way messaging system. Messages are sent from donotreply@firstinspires.org.

Invitation Tab
- Send email invitations for people to apply to volunteer at the event.

Role Details
The Role Details page provides information on the status of volunteers for this specific role. High level details are displayed at the top, and details will update as applicants are assigned and notified.

How to Edit the Role Target Number
- Select the “edit” link.
- Type desired number and click on the checkmark.

Unassigned Applicants
- Role Applicants – All applicants who have applied to this role.
- **Applicant** – List of volunteers who applied to the role through Volunteer Registration on firstinspires.org.
  - Sort alphabetically by clicking on “Applicant” header.
  - Click on the volunteer’s name to view more information on the volunteer
- **Screened** – Displays screening status. Hover over the symbol to see the current screening status explanation.

<table>
<thead>
<tr>
<th>Passed</th>
<th>Incomplete (Volunteer has not gone into the screening site.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>Not Applicable (Individuals with this status can be assigned. These individuals include Minors and/or those with a legal residence outside of the US/Canada.)</td>
</tr>
</tbody>
</table>
|                 | This person needs to log into their Dashboard and Proceed to the screening vendor (Volunteers with this status have started the screening process, but have not completed.) *
|                 | *In rare cases, this symbol may also display Do Not Assign. This status is for individual’s HQ has determined should not be assigned to any event role. |

- **Preference**- Volunteer’s preference for this role as chosen by the Volunteer (1 = First Choice, 2 = Second Choice, etc.).
- **# of Times in Role** - How many events this volunteer has served in this role. This goes by event, not by year.
- **FIRST Years of Service** – How many years the applicant has volunteered with FIRST (self-reported).
- **Days Available** – Days Applicant has listed as being available to volunteer.
- **Email** – volunteer’s email address.
- **Age** – Age of volunteer. This is useful if this role has age requirements.

**Assign as Needed** – Applicants who have applied to the role “Assign as Needed”.

**Applied but Assigned Another Role** – Applicants who listed this role in their application, but are currently assigned to another role. Volunteers can be assigned to multiple roles on the same day, so this tab may be helpful if you have a volunteer who applied to multiple roles that needs to be assigned.

**Volunteers in Role Previous Season** – Volunteers who were assigned this role in the previous season.
**Unassigned Applicants** – Applicants who have not applied to this role, but have applied to other roles for the event and are currently unassigned.

**Hidden Applicants** – Applicants who have been hidden from this role or this event.

**Volunteer Details**

- All contact information that the volunteer enters in Volunteer Registration can be seen on this page.
- This page can be accessed by 2 methods:
  - Volunteer Search bar
  - Clicking on a volunteer’s name within the Role Details page.
- Organization/Share with Employer
  - Organization will only be shown for volunteers who select that it is ok to share that information.
  - Volunteer information should not be shared. See the [FIRST Privacy Policy](#) for more information.
Volunteer Detail Tab Descriptions

Current Assignments
- Lists all events and roles in all programs this volunteer has been assigned to in this current season.
- If you are not managing an event that this volunteer has applied to, you cannot access this event (The name of the event and role will be grayed out).
- Use the **Place into Event** button to assign the volunteer to a specific event.

Assignment History
- All previous volunteer assignments.

VC Comments
- Volunteer Coordinators can enter comments about the volunteer.
- Comments are viewable by everyone who has access to this volunteer.

Other Events Applied — Lists all events and roles volunteer has applied for in the current season.

Team Associations
- List of teams this volunteer entered as an affiliation.
  - Affiliation refers to an official role on a team, either Lead Coach or Mentor, or if the volunteer has entered a team association (parent/guardian, etc).
  - Affiliations should be used to determine if there is conflict of interest in placing a volunteer in specific roles.

Current Applications
- This Tab only appears when you view the Volunteer Details through the Role Details page.
- The application details for this event are listed.
- From this screen, you can place the volunteer in a role, hide the volunteer from a role, or hide a volunteer from this specific event.

Volunteer Assignments

How to Assign Volunteers
Assign volunteers by role and notify them via VMS of their assignment details using the following steps:
- Select an event.
- Select a volunteer role.
- Select one or more volunteers by clicking on the checkbox next to their name.
- Click on the ADD TO SCHEDULE button to move the volunteer to the Role Schedule.
- View volunteer details by clicking on their name, and view volunteer comments by clicking on the speech bubble.

- Click into the calendar day you wish to assign a volunteer. This action will create a pop-up window to enter the assignment details.

  - The pop-up window contains a few options to make the assignment. It includes the role type, assignment date and hours, and the ability to apply the same assignment to multiple volunteers.
  - To assign a volunteer all day, select the check box for All Day Assignment and confirm the Start and End dates. The start date is pre-populated with the date box you clicked on the calendar. You can make a single or multi day assignment by making a calendar selection to populate the End Date.
To assign a volunteer to a specific time slot, enter a start and end time. Include AM or PM for the time selected.

To save your volunteer assignment, click on the Save button at the bottom of the pop up. This will add a Tentative schedule to the calendar in Blue for the volunteer selected.

Use the "Save Assignment and Notify" button to finalize your schedule and email the volunteer(s).

A pop-up window will appear, and you can select which volunteers you want to finalize assignments for and send an assignment email. You may use the additional checkbox options and add a custom message to this email. Click Send Email when complete.
Once you click Send Email, a Green bar will appear to indicate the message has been successfully sent.

Please note: The scheduling Type Legend lists all the possible scheduling types available.

<table>
<thead>
<tr>
<th>Scheduling Type Legend</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tentative</strong></td>
<td>Until the volunteer has been notified, this assignment is tentative.</td>
</tr>
<tr>
<td><strong>Shadow/Trainee</strong></td>
<td>A volunteer can be assigned to shadow or train with more experienced volunteers in the role.</td>
</tr>
<tr>
<td><strong>Hourly</strong></td>
<td>A tentative assignment in the Hourly view has been made.</td>
</tr>
<tr>
<td><strong>Unavailable</strong></td>
<td>The volunteer has indicated they are “Unavailable” for this day. However, if the volunteer indicates to you personally that they are available during this time, you can schedule on this day.</td>
</tr>
<tr>
<td><strong>Staffed</strong></td>
<td>This volunteer has been either “Tentatively” scheduled or officially assigned to another role on this day.</td>
</tr>
</tbody>
</table>
Duplicating assignment to multiple volunteers

To duplicate the same assignment to multiple volunteers, follow these steps:

- Click into the calendar day to start scheduling. Enter the desired date and time details.
- Click "Add/Remove Volunteers". This will show a list of volunteers that are available to apply the same assignment to. Use the check boxes to select the volunteers and then click save.
- Confirm the names you selected appear on the assignment pop up and then click save.

- After the volunteers have been assigned, any changes to individual volunteer schedules can be made per person and will not be duplicated to others.

How to Edit or Remove a Volunteer Assignment

- To remove an entire assignment – click on the x adjacent to the Volunteer’s name.
  - The volunteer will be removed from the role assignment and be moved back to the “Unassigned Applicants” section.
- To edit an assignment, click into the calendar assignment for the volunteer.
  - Adjust the date and time settings and select save.
  - Select Save Assignments and Notify to send an email to the volunteer with their new assignment details.

How to assign a volunteer from the Volunteer Details page

To navigate to the Volunteer Details page, click into your event and select a role. Then, click on a Volunteer’s name.

- Click on “Place into Event” button to select the event and role. The Volunteer will be placed into the schedule for the role. Proceed to schedule, assign, and notify the volunteer.

- Alternately, you may place a volunteer into the schedule by clicking “Place” in the Current Applications Tab for the Volunteer Detail screen.
You may search for a Volunteer under volunteer search from any page in VMS.

- Search for name of volunteer.
- Select volunteer name.
- Look at “Current Assignments” Tab.

How to Make a Custom Role

- From the Dashboard, Select an event.
- On the Event Detail page, click on the “Manage Custom Roles” Button.
Add the following details to the custom role:

- **Target Number** - How many individuals will you need for this role?
- **Name** – Title of this role.
- **Description** – What are the expectations of this role?
- **Allow Applications** – Would you like volunteers to apply for this role, or keep it hidden?

Click Add to complete.

A green “Success” pop-up will appear to indicate the role has been added.

If you need to edit a role after adding, click into the field and make the changes directly.

**Clone Custom Roles to Multiple Events**

If you manage more than one event and the events have the same list of custom roles, you can save time by using “Clone” feature to populate custom roles in all your other events.

- Select the roles from the Custom Roles list, and then roles.
- Select which events you would like the custom roles
- Click the “Clone” button, and all custom roles and target quantities will appear in the events you selected.
How to View Volunteer Training & Certification Results

Volunteer training & certification results can be viewed in the volunteer details page and in the Training & Certification report.

- Navigate to the Volunteer Detail page by using the Volunteer Search or by selecting a volunteer in the Unassigned Applicants/Role Scheduling area.
- Completed training and certification courses for the current season have a green checkmark, and the date of completion. Courses that are incomplete are have a gray checkmark.
- The certification tab on the bottom of the Volunteer Details page displays courses that are not tied to the current season (most applicable for FIRST LEGO Challenge League judge roles).
- Training and certification courses are role specific, as well as program specific.
- Volunteers access the courses via a link to the learning management system in their Volunteer Dashboard on firstinspires.org.
Messaging Volunteers

Messaging Tab

- Select an Event.
- Click on “Messaging” Tab
  - Select the volunteer roles and add to the Recipient Role(s) box.
  - Select if the message should be sent to volunteers who have applied or been assigned.
  - Enter a Subject Line and Message.
    - Include your name and email address, as these are not automatically included.
  - Once you click Send, a green bar will appear to indicate the message has been successfully sent.
Invite Volunteers to Apply to Your Event

Volunteers can be sent an invitation to apply to a specific event in VMS. Invitations will be sent to the emails entered, and an invitation is also sent to their firstinspires.org account. This includes a link that will bring the volunteer directly to the application page for that event.

To send an invitation, select an event, and then click on the tab Invitations.
Next, enter the email addresses for one or more people you would like to volunteer. A personal message may be added to the invitation. Include your contact details, or use the checkboxes below the message to include your email address.

Here is a sample of the emailed invitation:
Hello,

You are invited to be a FIRST event volunteer at the following event:
Event Program: FRC
Event Name: Arkansas Regional
Event Dates: 03/04/2020 - 03/07/2020
Event Location: Little Rock, AR, USA
Volunteer Coordinator: Peter Pan
Volunteer Coordinator Email: volunteertesting1+10@gmail.com

Please click here to login or create an account to access your FIRST Dashboard. Then, click on the notification in your profile. This will bring you to the volunteer invitation, which has a link to the event application.

An example of the notification volunteers will see in their FIRST account:

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**Search for a Volunteer**

A volunteer must have a FIRST account and have applied to the event/program you are managing in order for their name to be found in your search. Volunteer Coordinators cannot search for volunteers from last season. To view last season volunteers, you can view the Previous Season Volunteers report, as well as in the Volunteer Finder tab.

- The volunteer search field can be accessed at any time. You can search for any volunteer who has applied to your events.
- Enter the name (First, Last, or both) or email of the volunteer.
- The name you enter will automatically populate the “Search by Phrase” Field. Names matching this search will populate in the Search Results.
- Click on the volunteer name to view their details.
Volunteers who Apply to Program/Region

Volunteers have the option to “Apply to Program” in Volunteer Registration. Volunteers can select any programs they are interested in volunteering for, which places their name in a list of volunteers available in your area. These volunteers can then be contacted if you need roles filled for your event.

Volunteer Coordinators will only see names of those volunteers in the programs and region of their events. Each column can be sorted and clicking on the volunteer name will bring you to their volunteer details page.

If no volunteers have applied to the program and region you are overseeing, you will see this message:
Volunteer Finder
The Volunteer Finder is intended to help find volunteers from previous seasons' events. Access to this information will vary depending on the role of the user.

- Select Volunteer Finder
- Select a region, season, and event name.
- Click Search after you make your selections to view a list of volunteers.
- Past Volunteer assignment information may not be available for all programs and years.

Reports
- Select an Event.
- Select the “All Reports” Tab.
- Select the Report you would like to view.

FIRST® is a global robotics community that prepares young people for the future.
The Report you choose will populate on the screen.

Select “Export” to download the report as an Excel file.

Follow all FIRST Privacy Policy standards when downloading event reports to ensure data protection.

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How to Assign a Volunteer Coordinator

Note: Volunteer Coordinators for FIRST Robotics Competition events can only be assigned by FIRST Headquarters. For all other programs, Program Delivery Partners will make the Volunteer Coordinator assignments in VMS. Volunteer Coordinators must be assigned to each event individually.

Prior to Assigning the Volunteer Coordinator

- The Volunteer Coordinator must have an active FIRST account and have valid youth protection screening.
- The Volunteer Coordinator must have applied to the event (or any event that you are managing).
NOTE: Volunteer Coordinators are any designated individuals the Program Delivery Partner indicates should have access to VMS. This includes, but is not limited to, regional program managers, event managers, tournament directors, etc.

Assigning the Volunteer Coordinator

- From Dashboard, Select an Event.
- On the Event Details Page, click “Manage Volunteer Coordinators”.

- Search for the individual by email address

- Click “Add”.
- A green bar indicating your Volunteer Coordinator has been successfully added will appear.

- The First Name, Last Name and email will appear in the Volunteer Coordinator list.

After you have assigned your Volunteer Coordinator

- Email your Volunteer Coordinator stating they now have access to the Volunteer Management system.
  - Include the link to login: https://my.firstinspires.org/VMS/Login.aspx
- The Volunteer Coordinator will be able to access this system with the same Email/Password they use for Volunteer Registration.
Please direct your Volunteer Coordinator to contact volunteer@firstinspires.org with any questions or concerns.

If Volunteer Coordinators need to Assign Other Volunteer Coordinators
- Only Partners and HQ staff can assign Volunteer Coordinators. Please contact your local area partner or program director for further assistance.

How to Report a Bug
There are two ways to report a bug in VMS.
- Complete the online form: http://www.firstinspires.org/vims-and-vms-issue-reporting-form
- The form is also located on the VMS Landing Page under “Report an Issue”
- Email volunteersystems@firstinspires.org
  - Please add all details and include screenshots if appropriate.

Additional Resources
Additional volunteer resources are available in the Resource Library on the FIRST website.
- VMS Tutorial videos
- General Volunteer Resources
  - FIRST Volunteer Handbook
  - The Volunteer Registration User Guide
  - Event Volunteers – Position Descriptions
- Forms
  - Conflict of Interest and Disclosure Statement
  - Consent and Release Form- Electronic version in your FIRST account
  - Consent and Release Forms- PDF version available in HELP menu of VMS to download for walk-on volunteers
  - FIRST Walk-On Event Volunteer Policy and Application Form
  - Medical Incident Report Form
  - Non-Medical Incident Report Form
- FIRST Privacy Policy