Volunteer Management System (VMS)
User Guide

https://my.firstinspires.org/VMS/Login.aspx

For Questions, Comments, or Concerns:
Volunteer Registration Questions- volunteer@firstinspires.org
Volunteer System Questions- volunteersystems@firstinspires.org
YPP Youth Protection Screening- safety@firstinspires.org
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How to use 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 links to other helpful resources.

Please note, the Volunteer Management System will be referred to as VMS throughout this guide.

Log In

- Login with your FIRST email and password
- 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 is established when a role, such as Volunteer Coordinator, is assigned. Access expires at the end of each FIRST season. Volunteer Coordinators need to be reassigned in the new season for continued access.
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

Each event type is populated with a set of 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 to make the event happen.

- **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.

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**

**Activities Assistant**

- The Role Details page provides information on the status of volunteers for this specific role.
- High level details are displayed at the top.
- Details will update as applicants are assigned and notified.
- Change “Role Target Number”
  - Press the “edit” link.
  - Type desired number and click on the checkmark.

- **Role Applicants** – All applicants who have applied to this role. (NOTE: Below are brief descriptions of the columns on these tabs.)
- **Applicant** – List of volunteers who applied to the role in VIMS.
  - 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>
</tr>
</thead>
<tbody>
<tr>
<td>Incomplete. Volunteer has not gone into the screening site.</td>
</tr>
</tbody>
</table>
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

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 it.

*In rare cases, this symbol may also display “Do Not Assign”. This status is for individual’s HQ has determined should be not 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 (Note: This number is currently being pulled from assignments made via a FIRST system).
- **FIRST Years of Service**: Applicants reports the year they started volunteering for FIRST. The Volunteer Management system calculates the number of years in this column.
- **Days Available**: Days Applicant has listed as being available to volunteer.
- **Email**: Applicant/volunteer’s emails.
- **Age**: Age of volunteer. This is useful if this role has age requirements and/or physical limitations.

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

**Applied but Assigned Another Role** – Applicants who listed this role in their application, but are currently assigned to another role. Multiple same-day assignments are possible, so this tab may be helpful if you have a volunteer who applied to multiple roles that need 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:
  - Clicking on a volunteer’s name after searching under volunteer search.
  - 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.

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.
- The Date, Comments, and the name of the individuals posting the comment will be listed.

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.

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
A Volunteer is not officially assigned until they have been notified via VMS within the tab “Step 2: Complete Assignment”.

How to assign a volunteer from the Role Details page.
- Select an event.
- Select a listed Role to access the Role Details page.
- Select Applicant (By selecting the box adjacent to their name or directly grabbing their name).
- Select “Schedule Applicant” or Drag and Drop to the “Scheduling for: Role” section.
- Hover over speech bubble to view volunteer application comments
- The “Scheduling for: Role” will populate with the applicant’s name and availability.
### Scheduling options:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tentative</td>
<td>Until the volunteer has been notified, this assignment is tentative.</td>
</tr>
<tr>
<td>Shadow/Trainee</td>
<td>A volunteer can be assigned to shadow or train with more experienced volunteers in the role.</td>
</tr>
<tr>
<td>Hourly</td>
<td>A tentative assignment in the Hourly view has been made.</td>
</tr>
<tr>
<td>Unavailable</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>Staffed</td>
<td>This volunteer has been either “Tentatively” scheduled or officially assigned to another role on this day.</td>
</tr>
</tbody>
</table>

- For more details, click on the volunteer’s name to go to their Volunteer Details page.
- Staffed Volunteers can be assigned to multiple roles on the same day if they are scheduled hourly, and not in overlapping time periods.

- Drag the “Tentative” bar to the day you would like the volunteer to be assigned.

- Assignments can be all day (Daily) or Hourly. Select the toggle button for Hourly to assign specific times to the volunteer.

- **Editing Assignments**
  - By clicking on the circle icon next to the tentative assignment, you can edit the assignment.
Step 2: Complete Assignment

To assign this volunteer, click on the “Step 2: Complete Assignment” Tab.

- Select the check box next to each volunteer you would like to Assign and Notify.
- Select “Assign and Notify Selected”.
- After Clicking “Assign and Notify Selected”, a pop-up window with a customizable email will display. In the fields provided, you can add further instructions for the volunteer about training, how to contact you, day of event instructions, etc.
- Please add your contact information so the volunteer can email you directly.
Once you click send, a Green bar will appear to indicate the message has been successfully sent.

- You can Assign and Notify multiple volunteers at the same time.
- When you return to the “Step 1: Beginning Scheduling” the icons for the volunteer will have changed to green, indicating that they have been notified.

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.

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

2. Alternately, you may place a volunteer into the schedule by clicking “Place” in the Current Applications Tab for the Volunteer Detail screen.
3. You may search for a Volunteer under volunteer search from any page in VMS.
   a. Search for name of volunteer.
   b. Select volunteer name.
   c. Look at “Current Assignments” Tab.

How to Remove a Volunteer Assignment

- Navigate to the volunteer role and Scheduling grid.
- To remove an entire assignment – click on the adjacent to the Volunteer’s name
  - The volunteer will be removed from the “Scheduling for: Role” and be moved back to the “Unassigned Applicants”
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 League judge roles).
- Training and certification courses are role specific, and include event roles for FIRST LEGO League, FIRST Tech Challenge, and FIRST Robotics Competition.
- Volunteers access the courses via a link to the learning management system in their Volunteer Dashboard on firstinspires.org.
Volunteer Coordinators may try the updated VMS scheduling process during the 2019-2020 season. To use this updated functionality, click on the button “try our new scheduling page”.

How to assign a volunteer from the new Role Details page.

- 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.

| Scheduling Type Legend: | 〇 Tentative | 〇 Shadow/Trainee | 〇 Assigned | 〇 Hourly Assignment | 〇 Unavailable | 〇 Staffed |

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.

Contacting 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.
  - 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.

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:

![Volunteer Invitation]

**Search for a Volunteer**

A volunteer must have a FIRST account and have applied to the event/program you are managing. 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.
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.

**How to Assign a Volunteer Coordinator – Partner Permission required**

Note: Volunteer Coordinators for the FRC program can only be assigned by FIRST Headquarters. For all other programs, 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**
o From Dashboard, Select an Event.

o On the Event Details Page, click “Manage Volunteer Coordinators”.

![Manage Volunteer Coordinators](image)

o Search for the individual by email address

![Search Volunteer Coordinator](image)

o Click “Add”.

o A green bar indicating your Volunteer Coordinator has been successfully added will appear.

```
Success - Volunteer, Dorores Umbridge, successfully assigned.
```

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

**After you have assigned your Volunteer Coordinator**

o 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](https://my.firstinspires.org/VMS/Login.aspx)

o The Volunteer Coordinator will be able to access this system with the same Email/Password they use for Volunteer Registration.

o Please direct your Volunteer Coordinator to contact volunteer@firstinspires.org with any questions or concerns.

**If Volunteer Coordinators need to Assign Other Volunteer Coordinators**

o 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.

- 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 resources are available in the Resource Library of our website:

[http://www.firstinspires.org/resource-library/volunteer/general-volunteer-resources](http://www.firstinspires.org/resource-library/volunteer/general-volunteer-resources)

- General Resources
  - *FIRST* Volunteer Handbook
  - The Volunteer Registration User Guide
- Event Volunteers – Position Descriptions and Recognition
- Forms
  - Conflict of Interest and Disclosure Statement
  - Consent and Release Form
  - *FIRST* Walk-On Event Volunteer Policy and Application Form
  - Medical Incident Report Form
  - Non-Medical Incident Report Form
- *FIRST* Privacy Policy