

# Volunteer Applications

## Contents

## Overview

The **Volunteer Application Management** window allows an **Operator** to view, search, approve or reject those **Applications** that have been submitted but are still pending or that have been rejected. The window consists of two panes. The left side is a list of people who have submitted applications. The right side contains all the applicable information associated with the person selected, including tabs to provide greater detail and additional tools.

Also, from this screen, the Operator has the ability to either **Reject Application** or **Approve Application**. For more information, please see [Approve](#) or [Reject Application](#).

The screenshot shows the 'Volunteer Application Management' interface. On the left, a list of people is displayed under the 'Full Name' header. The list includes 'Phelps, Vivian', 'Simon, Fred', and 'Smith, Joshua'. The right pane shows the details for the selected person, 'Smith, Joshua'. It includes fields for 'Person ID' (JS5990), 'Prefix/Suffix', 'First Name' (Joshua), 'Last Name' (Smith), 'Birthdate' (01/11/1965), 'Sex' (Male), and 'Ethnicity' (Caucasian). There is also a 'Sign-In Message' field. Below these fields, the status information is displayed: 'Status: New', 'Security Group: Person', 'Facility: Adams Middle School', 'Classifications: Visitor, Volunteer', 'Primary Phone #:', and 'Emergency Contact:'. At the bottom, there are two buttons: 'Reject Application' (red) and 'Approve Application' (green).

### Actions

Click the Actions menu for the following options:

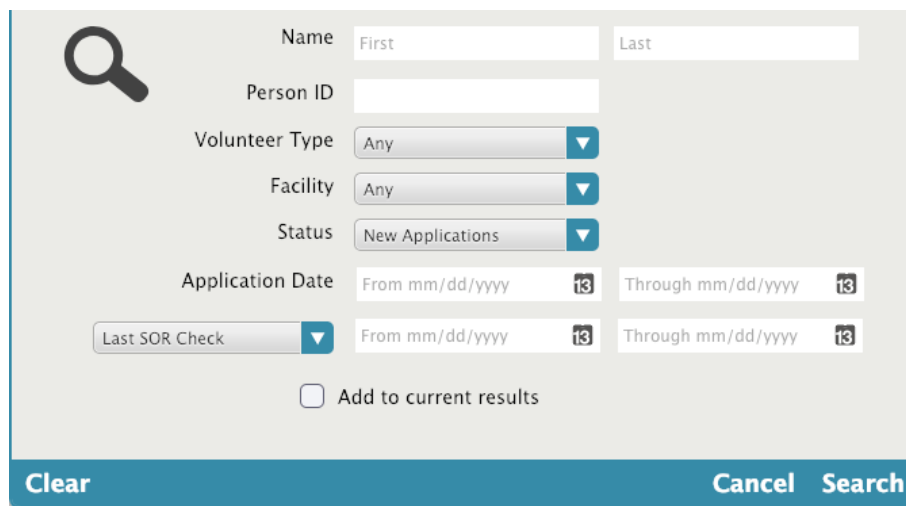
- [Approve Application](#)
- [Reject Application](#)
- [Resolve Duplicates](#)
- [Resolve Duplicates by ID](#)
- Add Picture
- Remove Pictures



Notifications will be sent when an application is approved or rejected, if configured in [Volunteer Notifications](#).

## Search

The KeepnTrack People Search utility allows an operator to enter specific parameters to perform a search for a single person or a group of people that fit the criteria.



Search form fields:

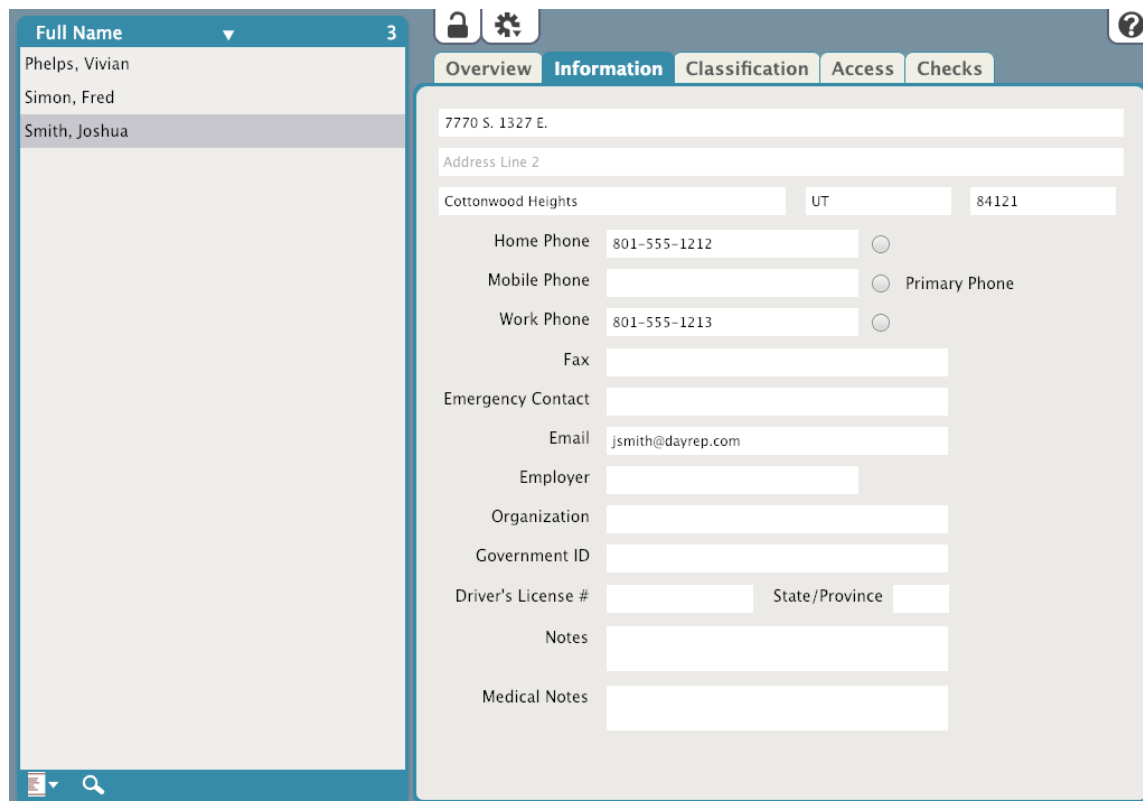
- Name: First, Last
- Person ID
- Volunteer Type: Any
- Facility: Any
- Status: New Applications
- Application Date: From mm/dd/yyyy, Through mm/dd/yyyy
- Last SOR Check: From mm/dd/yyyy, Through mm/dd/yyyy
- ☐ Add to current results
- Buttons: Clear, Cancel, Search

All fields are optional, but at least one field must be filled out before a Search can be attempted.

- **Name.** Enter the person's first and/or last name.
- **Person ID.** This is a drop down field that provides a list of currently used ID's within the KeepnTrack system.
- **Facility.** This drop down allows the Operator to select which Facilities the Applicant has access to, or all Facilities.
- **Status.** This is a drop down field from which an Operator can choose: Any, Active, Inactive, Access Denied or Pending.
- **Application Dates.** This provides the Operator a range of time in which to search.
- **Last SOR Check/Last CBC.** This provides the Operator a range in which to search for when the last Sex Offender Registry or CBC was performed.
- **Add to Current Results.** When this box is checked, all results will be added to an ongoing list, allowing an Operator to build a set of results with multiple criteria.

## Information

The **Information** tab provides additional information about the person.



Information tab details:

- Full Name: Phelps, Vivian, Simon, Fred, Smith, Joshua
- Address: 7770 S. 1327 E., Address Line 2, Cottonwood Heights, UT, 84121
- Home Phone: 801-555-1212
- Mobile Phone: (Radio button for Primary Phone)
- Work Phone: 801-555-1213
- Fax:
- Emergency Contact:
- Email: jsmith@dayrep.com
- Employer:
- Organization:
- Government ID:
- Driver's License #: , State/Province:
- Notes:
- Medical Notes:

**Address:** home address of the person

**Address Line 2:** for additional address information

**Emergency Contact:** this field lists the name and phone number for an emergency contact for the selected person

**City:** the city in which the person resides

**State/Province:** state or province in which the person resides

**Postal Code:** zip code or postal code where the person resides

**Home Phone:** home number for the person selected

**Mobile Phone:** cell/mobile number for the person selected

**Work Phone:** work phone for person selected



There is a radio button labeled **Primary Phone** next to the three phone number fields (home, mobile, and work). Whichever number is selected is the one that will be listed under the **Overview** tab as the **Primary Phone #**.

**Email:** the person's primary email

**Employer:** current employer of the person

**Organization:** this text field will contain the organization the person is affiliated with (e.g. Alexandria Elementary School)

**Government ID:** if the person has a government ID, the number will be listed here

**Driver's License #:** the person's driver's license number

**State/Province:** the state or province who issued the driver's license

**Notes:** open, editable text field that contains additional information about the person

**Medical Notes:** open, editable text field that contains important medical information about the person (e.g. "Allergic to penicillin.")

## Classification

In the **Classification** tab, you will find all the Classifications the person belongs to listed across the top. After selecting one, their time spent in Activities for that Classification will appear to the right as "Current Activities/Hours" or "Lifetime Activities/Hours".

The screenshot shows the 'Classification' tab for an 'Authorized Visitor'. The left sidebar lists three names: Phelps, Vivian; Simon, Fred; and Smith, Joshua. The main content area displays the 'Authorized Visitor' form. It includes fields for 'License Plate #', 'Vehicle Description', and 'Vehicle Registration'. Below these is a 'Has Felony Conviction' section with radio buttons for 'Undeclared', 'No', and 'Yes'. At the bottom, there is a paragraph of text explaining the classification process and a link to 'Click here to learn more'. On the right, activity statistics are shown: 'Current Activities/Hours: 0 / 0.00' and 'Lifetime Activities/Hours: 0 / 0.00'.



Unknown macro: 'multiexcerpt-include-macro'

The screenshot shows the 'Classification' tab for an 'Authorized Volunteer'. The left sidebar lists the same three names. The main content area displays the 'Authorized Volunteer' form. It includes a checkbox for 'Authorized Volunteer' which is checked. Below this is an 'Effective/Expiration' section with date pickers. The 'Volunteer Type' is set to 'Parent'. There is an 'Application Notes' text area and a 'View Preferred Activities' button. At the bottom, 'Preferred Times' are listed as 'I prefer mornings, Wednesday through Friday.' and a 'View Custom Fields' button is present. On the right, activity statistics are shown: 'Current Activities/Hours: 0 / 0.00' and 'Lifetime Activities/Hours: 0 / 0.00'. At the bottom of the form, it says 'Last Application Date: 08/07/2015' and 'Review Date: 01/30/2019'.



Unknown macro: 'multiexcerpt-include-macro'

## Access



The KeepnTrack Background Check window allows Operators to run both Sexual Offenders Registry and Criminal Background Checks checks from one location. Operators are often required to perform more in-depth and complete background checks than KeepnTrack's integrated Sex Offender Check currently allows. Using systems outside of KeepnTrack for criminal background checks wastes precious time and costs you additional money. Not only does KeepnTrack easily coordinate and manage such checks, they're generally of a higher quality than nearly all other third-party systems—covering the entire United States and not just your current state.

The data for these checks is aggregated directly from court-reporting agencies, departments of corrections, state and local sex offender registries, as well as national security websites. Some of our sources include:

- Department of Corrections
- Arrest records
- Warrant records
- Administrative Office of the Courts
- Sex Offender records with images for the entire United States

COMPanion sells “tokens” for this service; as long as your account has tokens available, you can perform criminal background checks.

Every time a background check is performed, KeepnTrack will immediately deduct one token, create a history record for the selected person, and record the transaction information and results for each check. KeepnTrack also provides detailed transaction reports so you can see how your resources have been spent.

## Perform Sex Offender (SOR) Check

Use of Sex Offender Checks are subject to the obligations and protections of your state laws and the [Fair Credit Reporting Act](#).

### Last SOR Check

Date of most recent Offender Registry Check.

### Operator

Name of the operator who ran the Offender Registry Check.

### Last Check Status

This field shows the results of the Last Check Status. One of three results will be displayed if an Offender Registry Check was run:

- Offender Identified
- Access Allowed Offender Identified
- Access Denied No Offender Records Matched, False Positives Recorded

### Reset

Resets all displayed data.

## Criminal Background Check Settings

By clicking *Perform Background Check*, you agree to the terms defined in the **Background Check Disclaimer**. Use of Criminal Background checks are subject to the obligations and protections of your state laws and the [Fair Credit Reporting Act](#).

### Tokens Remaining

This counter is used to display how many tokens you have remaining; it can't be modified by any level of account operator. When the Tokens Remaining number gets low, it's time to order more tokens. If you attempt a criminal background check and have none remaining, you'll receive an error message that reads: “A background check cannot be performed at this time because you have no available checks remaining; please call COMPanion's sales department for information on how to purchase more tokens.”

### Notes

This is a text field that allows the Operator to enter a note that will be displayed at

### Last Background Check

This field displays the date the last time a Background Check was performed.

### Operator

Name of the operator who last performed a Background Check.

### Results

Displays the result of the most recently run Background Check. The three possible designations are; Passed, Failed or Needs Review.

## **FCRA Status**

Applicants are protected by the Federal Fair Credit Reporting Act (FCRA) when third-party information is used in the evaluation of their volunteer application. Applicants may either accept or deny consent for the use of background checks. If they deny consent, their application may be rejected based on that decision. If they accept, the information obtained is subject to the protections of the FCRA and any applicable state laws. This non-editable field shows if they have given or denied consent.

## **Background Check History**

All previous background checks are displayed in the Background Check History section at the bottom of the Criminal Background Check utility. Meaningful columns include Date (showing most recent first), followed by Operator name, and the Results of the criminal background check (e.g. "Match" if a selected record is saved or "No Match" or "Needs Review"). Individual criminal background checks can be selected and, with the tertiary Actions menu, the following functions performed:

### **Print Selected Background Check**

This selection displays a ".pdf" report for the selected criminal background check; reports are also available for criminal background checks where no matching data was retrieved.

### **View Selected Background Check**

This selection will re-open the Background Check Results dialog and display the criminal background check as it was originally viewed during the check process.