

Volunteering Management System

CERVIS User Guide

For Volunteers, Group Leaders, Staff (Leadership Team) and Administrators



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TERMINOLOGY AND LOGGING IN

This is how to use the CERVIS Volunteer Management System. **CERVIS** stands for Community Event Registration and Volunteer Information System! The language used in Volunteer Management Systems varies, even though the underlying ideas are similar – here are some key terms for CERVIS.

Previous WHC terminology	CERVIS terminology
Volunteers when applying say at which venue or venues they want to work.	Volunteers when applying join a group or groups. (No mystery - we will have seven shelter groups, and one each for the other services. Shifts are attached to groups.)
Activities for each venue are managed by a coordinator .	Activities (“ opportunities ” or “ events ”) for each group are managed by a group leader .
Certain WHC volunteer activities are ongoing, such as helping with donations of goods.	CERVIS refers to these opportunities as service projects .
Most WHC activities occur on a specific schedule. A shift might be Support Centre Tuesday, 9.45am-1pm.	CERVIS refers to this type of opportunity as an event . On a particular date, for a particular role (eg Host or Shift Assistant), it’s called a slot .
Scheduling works as follows. A volunteer indicates shift preferences, desired service frequency and dates of specific unavailability. The system works out who is available for a specific shift and date and coordinators assign from that list.	A volunteer joins a group and straightforwardly offers to do events on specific dates. Group Leaders choose from those offers to form a team for each shift. This places responsibility for frequency and availability on the volunteer.
A volunteer is assigned to a shift and date.	In the end, a volunteer is registered to a slot.
	But first, a volunteer offers a shift by requesting to be registered to a specific slot (this is a registration request). Until it is approved, the request is pending .
	The Group Leader approves or declines pending requests to create the team.

Understanding the instructions below

“Select” means tick the square box beside the item to be selected. “Select all” means tick the square box at the top of the list of items to be selected – this will tick all the individual boxes beside each item in the list. If you are using a phone or other touchscreen, read “click” as tap.

Navigation note: your home page lists all menu items. They are also accessible from drop-down lists from the black navigation bar at the top of most pages. NB, there are functions we don’t use. Avoid them. If you get lost, find your way back to the home page using the house icon on the black bar. Tapping or hovering over the person icon at the right of this black bar shows clickable commands including Update my Profile and Sign Out. Use buttons at the foot of most pages (eg < Main Dashboard) rather than your browser back button. If you end up nowhere, try reloading the page.

Your session will end after 30 minutes' inactivity. Shortly beforehand, the screen will turn pink and give you the option to stave off the timeout.

Acknowledgment messages: most actions result in a green success message. In many cases these only appear at the top of the page, so make it a habit to check there, as that is also where error messages will appear indicating that the desired action has failed.

Making sure CERVIS emails reach you: they will come from wyhoc@cervistech.com; if need be, you may wish to whitelist that address. Note: any reply to a CERVIS email about an event will reach the organiser (group leader) of that event.

Note to author: Service Projects need to be added for Volunteers (how to offer) and GLs at least (Workflow file has GL info)

Getting started: how to create an account and log in

- If your data was already imported to CERVIS, proceed below.
- Otherwise, skip to the section “Applying to WHC using the CERVIS application form”.

Logging in if your data was imported

- Find the Volunteer CERVIS portal page on the WHC website, Volunteer section.
- If you are a staff member or group leader, follow the Administrator’s link, otherwise use the Volunteer’s link.
- For everyone: now log in. For Username, enter your email address. Click Don’t know password/Reset password.
- Enter your email address and first name and click Email temporary password.
- You’ll get an email with a temporary password; copy it.
- Back on the login page, paste in the temporary password and click Login with email.
- Choose your own password, and enter it twice, noting the requirements for length and characters.
- Click Change Password.
- Remember your new password!

Applying to WHC using the CERVIS application form

- If your data has not already been imported to CERVIS, click [here](#).
- Complete the application form. Use your mouse, tab or arrow keys to move around and note the format guidance at the top of the page.
- In the Volunteer Group section, choose the group you will work in or manage. Scroll the box to see all the possibilities. (An Administrator should select Help with Admin or Events etc.)
- Enter ALL the relevant roles you are willing to undertake (eg Host as well as Cook etc).
- Indicate if you would like occasional Supporter Emails about WHC and not directly related to volunteering. Enter Yes and the date.
- It is helpful for us to know if you are associated with any place of worship so that we can build a relationship there.
- Click the **Submit** button to submit the application. You will receive an **acknowledgment** email. (Continues below.)

- Wait for an **approval** email from WHC. On receipt click the link in the email to take you to the CERVIS portal on the WHC website.
- If you are a staff member or group leader, follow the Administrator's link, otherwise use the Volunteer's link.
- For everyone: now log in. For Username, enter your email address. Click Don't know password/Reset password.
- Enter your email address and first name and click Email temporary password.
- You'll get an email with a temporary password; copy it.
- Back on the login page, paste in the temporary password and click Login with email.
- Choose your own password, and enter it twice, noting the requirements for length and characters.
- Click Change Password.
- Remember your new password!

CERVIS for VOLUNTEERS

Log in on the WHC website at the CERVIS volunteer **portal** page using your email and password. (First time login instructions are above.)

If your data is imported or periodically you'll be asked to verify your data is still valid before you get to your home page. You'll be presented with an application form full of your existing data. Fill any gaps and update as required (eg date of birth, emergency contact). It may ask you to consent to Ts&Cs - these are WHC's volunteer conditions. Finally, click Verify Data.

Timing overview for events with scheduled slots, such as the night shelter

- Shifts will usually become visible a month at a time, typically two months ahead.
- You'll be asked to make offers for those new shifts by a certain deadline.
- Your group leader will then turn all the offers into a rota plan.
- You'll be told when the rota is complete and confirmation emails have been sent.
- You will not be needed for any shift that has not been confirmed.

To offer to take on shifts or a service project

- You will see the home page of the volunteer portal.
- Click Register / Apply for an Upcoming Opportunity.
- If need be, select your own name under "Step 1".
- In the list of events below "Step 2", click on your desired event and click on the green "Step 3" bar.
- *A step only for events with scheduled slots, such as the night shelter:* you'll see a list of the available dates for that event. Note, there may be multiple slots at the same time/date referring to different roles (eg host, cook, shift leader, reserve). You should request to register for all the roles and dates for which you are willing and qualified. Your group leader will know how often you prefer to volunteer and will assign you in the way that makes most sense. Choose your desired slots by clicking in the checkboxes. You can choose several at once across multiple dates. Click Register at the foot of the page. Opposite each slot you will see the number of people still to be registered for that slot, or "Full" if none; AND if you have submitted a request to be registered then "Pending" or if you have actually been registered then "Registered".
- You will immediately receive a confirmation email that your request(s) have been received. But your offer(s) have not yet been assessed yet.



The screenshot shows a dark grey navigation bar at the top with a home icon, the text "Volunteer Portal Menu", and a user profile icon. Below the bar, the page content is organized into sections separated by horizontal lines. The sections are: "Volunteer Portal Home", "Registration Management" (with three items: Register / Apply for an Upcoming Opportunity, View or Cancel Registration for an Upcoming Opportunity, and Record or Update Service Project Activity), "Profile Management" (with three items: Add Additional Volunteer to my Profile, View or Update Volunteer Profile Information, and Add Additional Group Member to my Group Profile), "Report Management" (with one item: View or Print Volunteer Activity History), and "Account Management" (with one item: Change Password).

- You can choose further events or service projects to register for if you wish.
- To finish, tap the person icon on the right of the black bar (if using a mouse, hover over it) and click Sign out.
- Note: once you have made a registration request on a slot, it will no longer be selectable on the slot list in order to request again.

Later, you will receive:

- a confirmation email that you have been accepted for that service project, or slot and date. It will indicate the role you have been registered for, which may be reserve.
- You may or may not receive a “thank you, but you will not be required for this particular date” email (if enough volunteers have signed up).
- Some days before the session you will receive a reminder email.
- If you are registered as a reserve, then if you are in fact needed, you will receive another confirmation email with the role you are now needed for.

If you are confirmed as a reserve

- If you are needed to replace a dropout, you’ll get a second confirmation email specifying the actual role you are needed for.
- If you don’t get one of these, then usually if you haven’t heard by 24 hours before the shift you can assume you are not needed.
- If there is a dropout within 24 hours of the shift, your group leader will resort to phoning you or using an emergency list instead.

To see what activities you are registered for; or to log hours for a service project

- From the volunteer portal home page (click the house at the left of the black bar), click View or Cancel Registration...
- You’ll see what you have offered for, either Pending or Registered.
- To log hours spent on a service project (an ongoing WHC role that has no specific shifts), select the service project and click Add Hours.
Step 1: if need be select your own name; step 2: select the relevant project; step 3: enter the date, hours and any note; step 4: click Record Service Project Activity

To cancel a shift offer

- If you need to **cancel on the day of your shift** (eg if you are unwell), please **get in touch with your group leader ASAP**. They will call the reserves or emergency list. (Note, if you have D&V we need 48 clear hours before you volunteer, to protect our guests and other volunteers.)
- To **cancel any time before the day of your shift**, please use the system so that a reserve can be called up, as follows.
- **Within CERVIS:** from the volunteer portal home page (click the house at the left of the black bar), click View or Cancel Registration...
- Select a service project or shift(s), optionally add a reason at the foot of the page, click Cancel Selected Event Registration(s). If your request had previously been accepted you will receive a cancellation confirmation email. (If your request was still pending, you won’t.)

- **Alternatively, from email:** if you made a shift offer but you need to pull out before the shift has been planned and **before you have received any confirmation email**, then in the **acknowledgment** email click on the cancellation links **for all roles you offered for that time**. If you need to cancel a shift **after it has been confirmed**, then click on the cancellation link in the **confirmation** email **for that shift**.

To update your details

- From the volunteer portal home page (click the house at the left of the black bar), click View or Update Volunteer Profile Information
- Update as desired; click Update Volunteer Information; click the < Portal Home button
- To sign out, tap the person icon (if using a mouse, hover over it); click Sign out

To contact WHC

- Emails you receive in connection with specific activities can simply be replied to.
- For general enquires you can tap the person icon on the right of the black bar (if using a mouse, hover over it) and click Need Help? Etc
- Follow the instructions