Process Described: **Onboarding**

Volunteer Management System	Staff	Volunteer	Other Party

Volunteer fills out application online

VMS produces Thank You prompt on screen → Sees Thank You prompt on screen

Generates Thank You email for submitted applciation → Receives Thank You email for submitting application

Creates volunteer profile.

Initial Status: New Web Applicant

Review applications

Approve application? — Yes / No

Changes volunteer **active status** to Rejected, sets **application status** to Rejected

Generates rejected application notification

Receives rejected application notification

Changes volunteer **Active Status**: Prospect, sets **Application Status**: Approved

Status Change: 2. Prospect

Sends email inviting volunteer to sign up for an interview → Receives email to signup for interview

Volunteer calls to set up interview

Emails volunteer interview confirmation with connection information → Receives confirmation notification about interview; contains details for virtual interview

Attends interviews? — Yes / Need to cancel / Did not show

Cancels via communications with staff

Update interview record **Status:** Missed by Interviewee

Host virtual interview; documents Interview questions

Sign up for a new interview date/time if slots available

Interview results? — Acceptable / Unacceptable

Updates interview record **Status:** Completed, **Result:** Unacceptable

Generate notification email to volunteers with **Completed/Unacceptable** interview record that team is not moving forward → Volunteer receives email indicating they are not moving forward

Changes volunteer **Active Status:** Rejected → Volunteer receives email indicating they are not moving forward

Updates interview record **Status:** Completed, **Result:** Acceptable

Changes volunteer **Active Status:** Interview Complete

Generates a weekly scheduled task report with list of Prospects with no interviews selected → Receives report of volunteers who have not selected an interview

Evaluate report to determine any accomodations; Changes volunteer **Active Status:** Never Started; **Inactive Reason:** No activity

Generates notification email to onboarding candidates that were changed to Never Started in the

changed to Never Started in the last 5 days

Status Change: 3. Interview Complete

Generate email to volunteers **Completed/Acceptable** interview record inviting them to signup for an Orientation training

Receives notification email with instructions to sign-up for Orientation training

Completes trainings through training system

Training system confirms to volunteer and staff about training completion

Receives acknowledgement Orientation training

Receives acknowledgement Orientation training

Completed orientation?

No — Yes

Generates a weekly scheduled task report with list of **Interview Completed** with no orientation completed

Receives report of volunteers who have not completed orientation

Sends email to onboarding candidates who have not completed training in 21 days

Receives notification email about profile being close due to no activity

Generate notification email with post-orientation instructions based on completed training records status of **"Eligible Prospect"**

Change volunteer active status to **"Eligible Prospect"**

Receives notification email with post-orientation instructions

Sumbits Eligible Prospects to Employee Health for scheduling of health appointment (internal process)

Creates certification **"Health Clearance"** for attached file

Reviews **Employee Health** document, sets status to **"Approved"**

Calls Employee Health Services to schedule appointment; attends appointment.

Adds background check request to begin background check vendor process

Generates notification email to volunteer about background check process

Receives notification email informing them to expect an email from vendor with background check instructions

Sends background check requests on selected records to vendor for processing

Vendor: Receives information from VMS regarding volunteers ready to have background check processed

Receives email from vendor with instructions to fill out background check information request

Vendor: Sends email to volunteer requesting them to complete background check information

Receive email notification from vendor informing that volunteer has filled out their information

Vendor: Receives and processes background check on volunteer based on provided information

Updates **Background Check** certification with results **Green: Unrestricted** and current date in volunteer profile

Staff recevies update. Staff retrieves Background Check Results from vendor to VMS regarding cleared volunteers

Vendor: Sends weekly report to staff with background check results

Passed Background Check?

No — Yes

Volunteer Manager escalates background results

Manually generates "Ready to start" letter template and sends email to volunteer

Receives email with **"Ready to start"** instructions