RISK MANAGEMENT & INSURANCE

University of Calgary

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VRMS Handbook

*for Better Impact Administrators*

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## Introduction to the Volunteer Registration and Management System (VRMS)

To meet requirements, legislative elements are presented within the software or included through process – some are controlled by the Enterprise (overarching UCalgary account), while others must be managed by coordinators at the department level. Directions necessary to meet compliance when using volunteers to support UCalgary’s programs and events are provided in the following pages.

* **Training** is available through various sources. See below for types of training and available supports.
* Each Better Impact account requires a minimum of one, preferably two, **Dept Coordinator(s) who will serve as the primary contact** between the Enterprise (Risk Management & Insurance department) and the department. They are responsible for ensuring that anyone in their department that is using volunteers are made aware of, and are adhering to, legislative requirements. For specific responsibilities of the administrative roles, please see [VRMS Administrators’ Roles and Responsibilities](#_VRMS_Administrators’_Roles_1).
* The information contained here is targeted towards Dept Coordinators and should be passed along to Volunteer Coordinators, as applicable. See [VRMS Administrators’ Roles and Responsibilities](#_VRMS_Administrators’_Roles_1)
* When the Better Impact account was allocated to your department, some elements were pre-entered and should not be changed. Before working in your account, review the page [Minimum Legislative Requirements in Better Impact](#_VRMS_Administrators’_Roles) to become familiar with these elements, and to **ensure you are processing your volunteer registrations in accordance with legislation.**
* For details about legislation governing volunteer management, refer to: [Managing UC Volunteers – Legislative Components in Better Impact](#_Managing_UC_Volunteers)

### Coordinator Resources:

* VRMS Handbook
* Risk Management & Insurance website [Volunteer Registration & Management pages](https://www.ucalgary.ca/risk/risk-management-insurance/services/volunteer-registration-and-management/volunteer-coordinators)

### System Support:

* UC Enterprise Administrators:
  + [ucvolunt@ucalgary.ca](mailto:ucvolunt@ucalgary.ca)
* Better Impact Help (administrators):
  + <https://www.betterimpact.com/volunteerimpacthelp/>
* myImpactPage.com Help (volunteers):
  + <https://www.betterimpact.com/siteguide/>

## VRMS - Getting Started

### Better Impact (BI) Account Set-Up

To increase your success using the Better Impact system, planning is key. It is important to take the time to consider how your department is structured and how you would like it to be presented in the Better Impact system.

*You might consider the following:*

* *The type of programs/events you offer*
* *The specific types of tasks/roles that would be required to fulfill the needs of the programs/events*
* *Prerequisites to perform, or be assigned to, a particular task or role.*
* *Type of information needed to pre-screen the majority of your applicants*
* *The level of automation you want when scheduling opportunities, sign-ups, etc.*
* *The kind of data/reporting you will need about your programs/volunteer types*

***Administrator access to Better Impact:*** <https://app.betterimpact.com/Login/Admin>

1. **Identify Department (Dept) and/or Volunteer Coordinators** – See [VRMS Administrators’ Roles and Responsibilities](#_VRMS_Administrators’_Roles)
   1. Obtain a signed *Oath of Confidentiality* for each Dept and Volunteer Coordinator (VC) you wish to have admin access on your Better Impact account
   2. Advise all Department and Volunteer Coordinators to take the [Volunteer Coordinator OHS Orientation](https://learning.my.ucalgary.ca/psp/lmprd/EMPLOYEE/ELM/c/LM_SS_LEARNING.LM_LEARNING_ITEMS.GBL?Page=LM_SS_ITM_DTL&amp;LM_CI_ID=1327)training (**Course ID -1327**) in Enterprise Learning
   3. To add Dept or Volunteer Coordinators to the Better Impact account, contact the Enterprise Administrator at [ucvolunt@ucalgary.ca](mailto:ucvolunt@ucalgary.ca). Include with your request:
      1. Signed Oath of Confidentiality – this should be signed by the coordinator requiring access and their supervisor (form is available on the [Risk Management & Insurance website](https://www.ucalgary.ca/risk/sites/default/files/teams/16/oath-of-confidentiality.vjan2020.pdf) and the Enterprise Document Library in Better Impact).
      2. Volunteer Coordinator OHS Orientation Certificate of Completion

\*\* Coordinators will not be added to the Better Impact account without these accompanying documents

* 1. Arrange for all Department and Volunteer Coordinators to review this handbook.

1. **Add account Contact information** (dept/program address, email, phone, website URL, etc.)
   1. Go to:
      1. Configuration ( icon)
      2. Organization Settings
      3. Contact information
   2. Optional: Add program Mission Statement and/or Social Media links
2. **Create Applications** (default application) as directed in the document: [**C**reating Applications in Better Impact](#_Creating_Application_Forms)
3. **Create Activities** as directed in the document: [Create an Activity](#_Creating_Activities_in)
4. Include a **link to connect your applicants to your application forms** on your recruiting interface (see Better Impact instructions [Links for Website and Email](https://support.betterimpact.com/volunteerimpacthelp/en/help-articles/recruitment-and-application-links-for-your-website-social-media-and-email-2/))

## Minimum Volunteers’ Legislative Requirements in Better Impact

**IMPORTANT: No applicant should be moved to an ACCEPTED status and assigned to volunteer before fulfilling the following requirements:**

**Potential volunteers must APPLY through the Better Impact system to legally agree to our waiver and age requirements. See *Manual Entry Process* if volunteer cannot submit the application themselves.**

1. Agree to the liability waiver – presented in two places
   1. To new applicants at the **myImpactPage login screen:**
      1. Agreement to the terms of the waiver is required to proceed with the application form **AND**
   2. As a statement **(custom field)** on new application forms.
      1. This is included by the Enterprise as a **requirement of acceptance** and **cannot be changed or removed** from the application forms.
      2. Application submission will be rejected by the system if applicant does not accept the waiver terms.
2. Applicants must attest to being 18 years of age or older as presented in the custom field “***Are you age 18 or older?”***
   * 1. This is included by the Enterprise as a **requirement of acceptance** and **cannot be changed or removed** from the application forms.
     2. Application submission will be rejected by the system if applicant does not attest to being age 18+
   1. Applicants under age 18 CANNOT apply through Better Impact
      1. Contact [ucvolunt@ucalgary.ca](mailto:ucvolunt@ucalgary.ca) for more information about managing volunteers who are not yet age 18.

***\*\*Step-by-step instructions for approving/accepting a volunteer are below - see*** [***Approving Applicants***](#_Approving_Applicants_and_1)

1. Complete the OHS Orientation.v2021
   1. For directions on how to communicate this to your volunteers, and to verify the course has been completed, refer to the page [**Volunteer OHS Orientation Process 2021**](#_Volunteer_OHS_Orientation)
      1. **NO** new or existing volunteers should be permitted to volunteer without confirming this training has been completed.
2. Privacy Policymust be displayed on the application forms. Please refer to the page [**Creating Application Forms**](#_Creating_Application_Forms) for its placement – this may be pre-filled, so do not change if it already matches what is contained in these directions.
3. PreparedHazard Assessmentsshould be made available for review on Better Impact if using the self-scheduling feature for activities. Please refer to the page [**Creating Activities in Better Impact**](#_Creating_Activities_in)
4. ***Logging Volunteers’ Hours*** should be done regularly, preferably as performed. They can be logged by either the volunteer, or by the coordinator, but must be coordinator-approved. See the page [**Volunteer Hours: Logging, Approving, Reporting**](#_Volunteer_Hours:_Logging,_1)

## Connecting volunteer applicants to your Better Impact application forms:

*For a potential volunteer to be managed in your Better Impact account AND have access to YOUR volunteer opportunities from the volunteer portal (myImpactPage.com), they need to* ***complete and submit an online application*** *form.*

As the University of Calgary volunteer opportunities are not generally publicly accessible, **YOU** must **provide new applicants with a** **link to your application form**(s) either as:

* a link on your website (recruitment platform), OR
* an email invitation, OR
* any other electronic communication method you are using (i.e., text, social media, etc.)
  + Steps to *GENERATE LINKS* to application forms are detailed here [*Generating Links to Application Forms*](https://support.betterimpact.com/volunteerimpacthelp/en/help-articles/recruitment-and-application-links-for-your-website-social-media-and-email/)
* Once an applicant **submits the application**, they:
  + **will have access to Better Impact’s myImpactPage.com volunteer portal**
    - they CANNOT access the volunteer portal (myImpactPage.com) without creating a Better Impact login, which is part of the application process
  + **can be managed in your Better Impact account**
    - they CANNOT access **your** volunteer opportunities without submitting an online application form specifically to **YOUR** department/program

The process workflow is:

1. Potential applicant is provided with a link to the department’s application form;
2. the link opens the Better Impact volunteer login page;
3. the applicant will either create a new login OR sign in (if they have volunteered with other organizations that use Better Impact, they can use the same login);
4. the application form displays
5. the applicant completes the form and selects “submit”
   1. a pop-up confirms the application has been submitted
   2. a “New Applicant” email is auto-generated as per settings previously determined
   3. the Better Impact coordinator(s) is alerted to the new application
6. the volunteer coordinator:
   1. ensures requirements are met, approves the application, and notifies the volunteer
7. now the volunteer can see your account and relevant opportunities on myImpactPage.com, as applicable

**\*\*Refer to the following pages for step-by-step instructions and their respective screenshots for generating links to your application forms.**

### Generating links to Application Forms from the *Links for Website* page:

1. Go to: *Configuration* –  icon (Fig. 1a)
2. Click on *“Links for Website”* found in the sidebar under *Recruitment*
3. Choose the: (Fig. 1b)
   * ***Application Form***: Direct link to your application form, OR
   * ***Mobile Application Form***: Direct link to your ***mobile*** application form
4. Select the application form to generate – typically, *Volunteer 1* form
5. Click *Generate Link* (green button lower right of page)

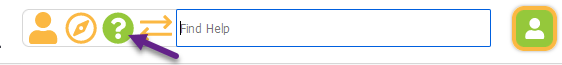
**OR:**

### Generating links to Application Forms from the *Application Form Settings* page:

1. Go to: *Configuration* –  icon (Fig. 2)
2. Click on “*Application Form Settings*” found in the sidebar under *Recruitment*
3. Select the application form to generate – typically, *Volunteer 1* form
4. Click *Generate Link* (green button top or bottom of page)

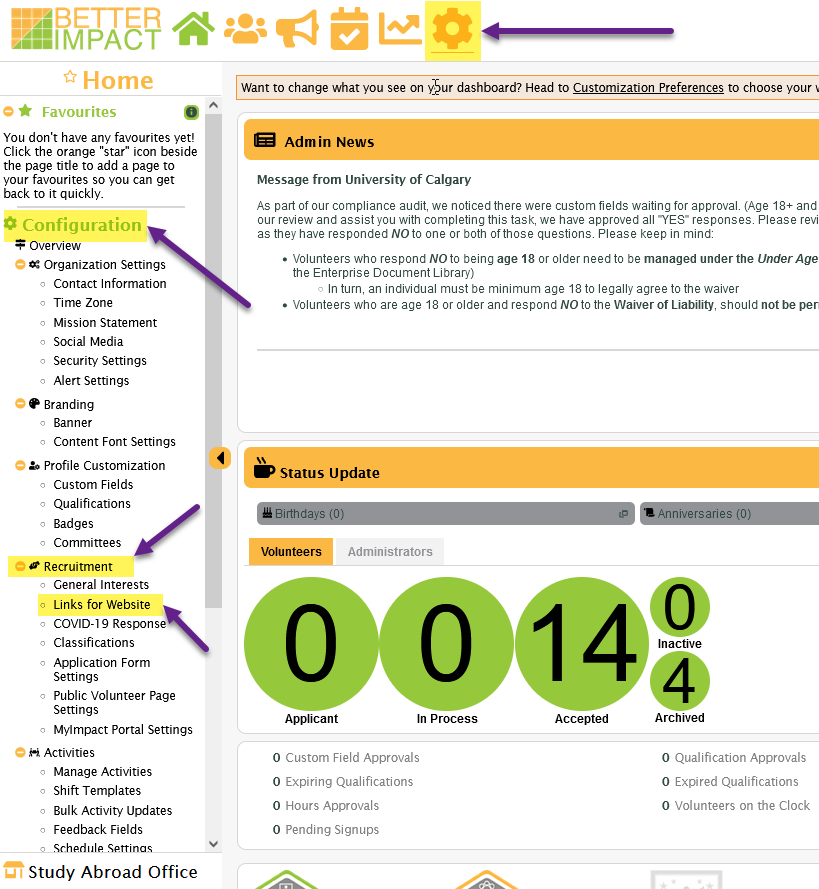
**Note:** When a volunteer clicks on your application form link, they can create a new profile (“I am new to MyImpactPage.com”) or re-use an existing profile (“I already have a username”).

For other Better Impact how-to articles and video demonstrations go to: <https://support.betterimpact.com/volunteerimpacthelp/en/help-articles/> **OR** search from your Better Impact account using the Help (?) icon in the search bar at top right corner of the page



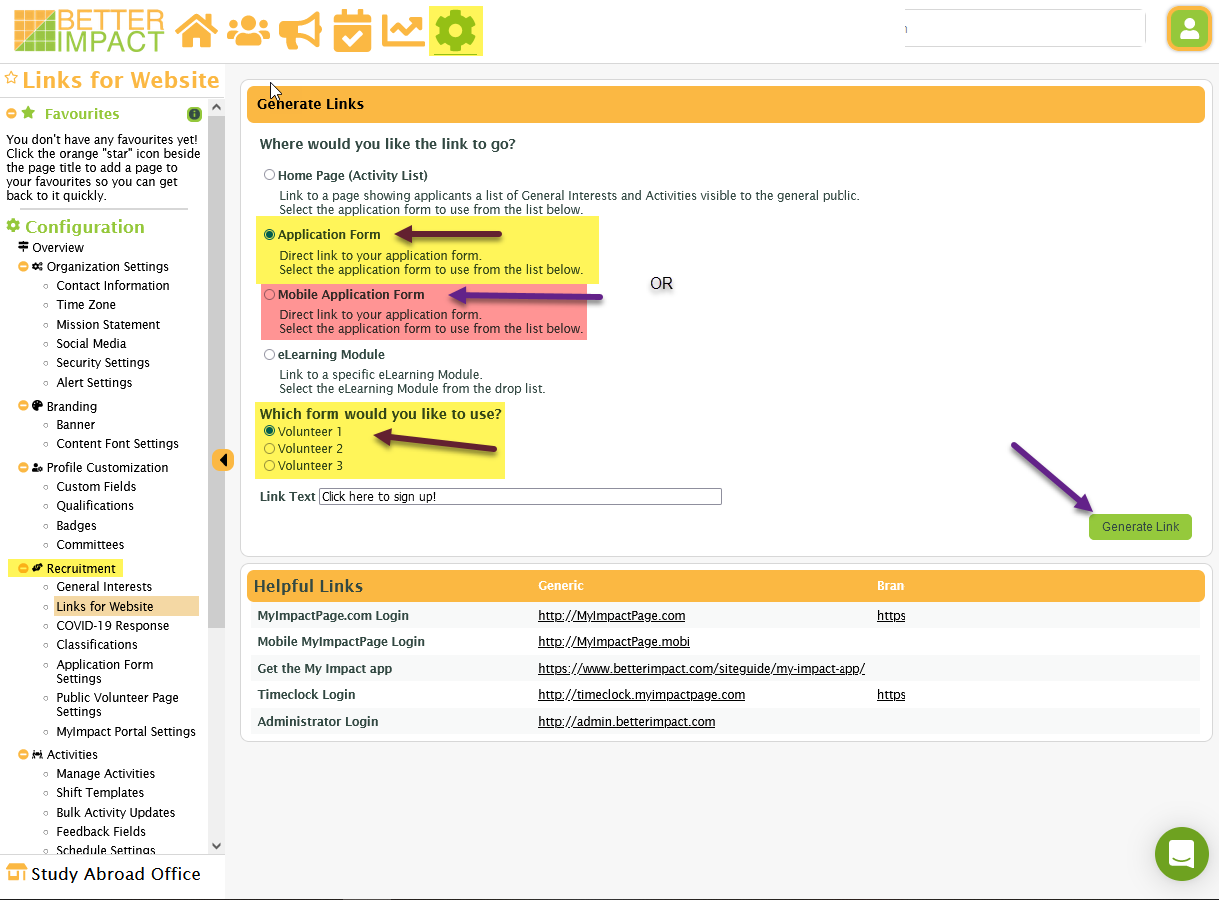
#### Fig. 1a - Generating links to application forms from the *Links for Website* page:

1. Go to: Configuration
2. Click on “Links for Website” found in the sidebar under Recruitment



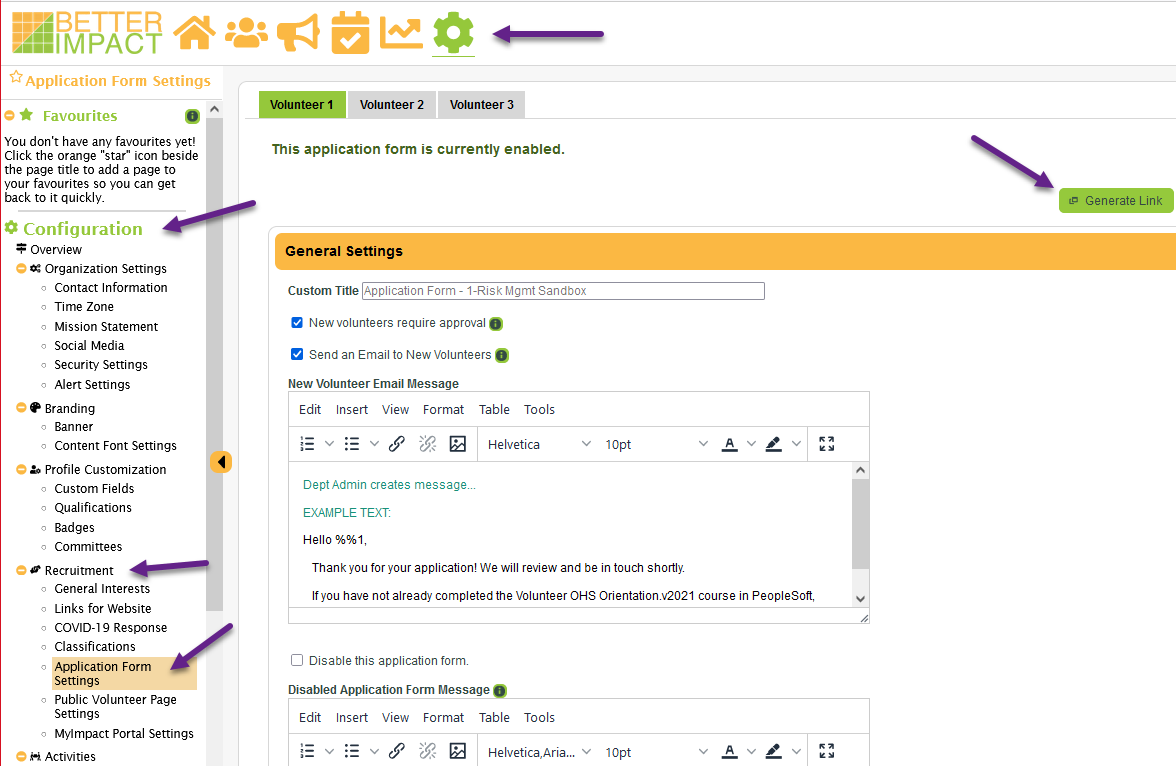
#### Fig. 1b - *Links for Website* page selections:

1. Choose the:
   * **Application Form**: Direct link to your application form, OR
   * **Mobile Application Form**: Direct link to your ***mobile*** application form
2. Select the application form to generate – typically, *Volunteer 1* form
3. Click *Generate Link* (green button lower right of page)



#### Fig. 2 - Generating links to application forms from the *Application Form Settings*:

1. Go to: *Configuration* –  icon
2. Click on *“Application Form Settings”* - found in the sidebar under *Recruitment*
3. Select the application form to generate – typically, *Volunteer 1* form
4. Click *Generate Link* (green button top or bottom of page)



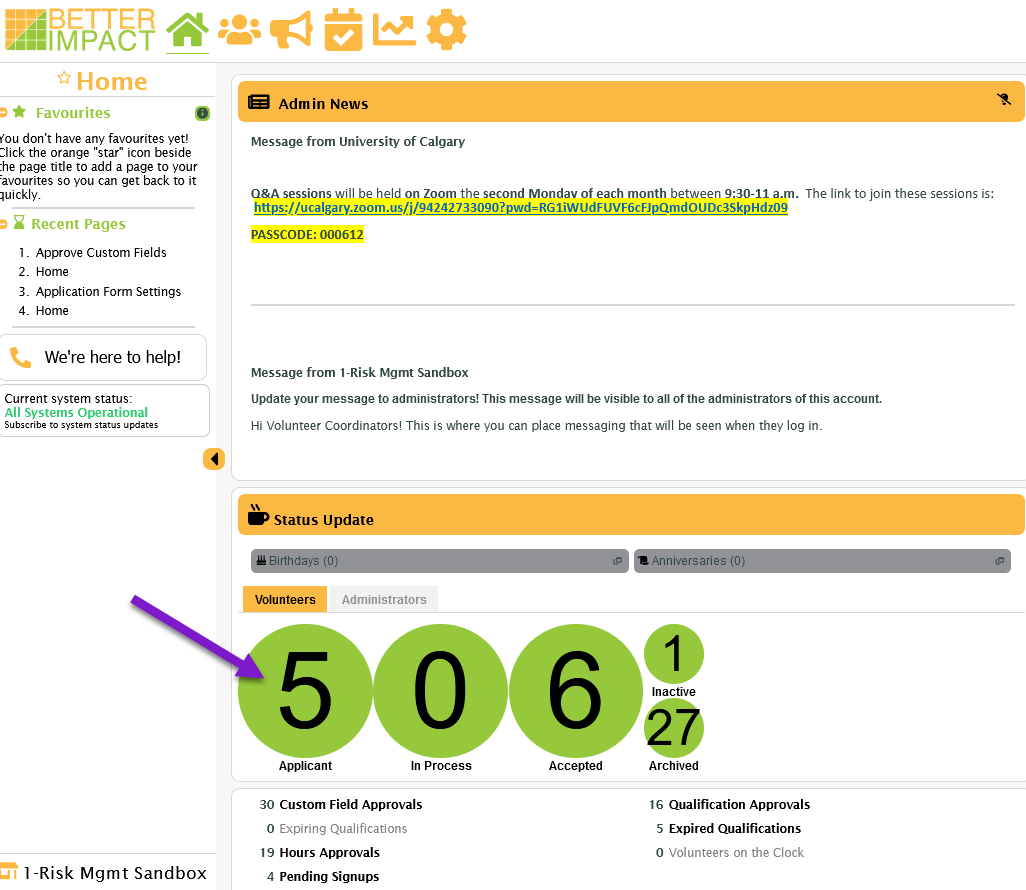
## **Approving Applicants and Updating Volunteers’ Status**

### Approving New Applicants:

**Applicants can be moved to an ACCEPTED** (approved) **status once the *OHS Orientation.v2021* is confirmed as completed.**

* **From the Better Impact dashboard (home page) see Fig. 1:**
  + Under *Status Update*
    - * *Applicant* (green circle) – represents the number of new applications waiting for processing
      * Clicking on this will display the names of the new applicants
      * Volunteers’ profiles can be reviewed by selecting the menu option to the left of each name
      * Applicants should not be moved to an ACCEPTED (approved) status until the following is confirmed

**Fig. 1**



##### **OHS Orientation completion**

The **OHS process is automated** so does not require specific admin approval. Once the training is successfully completed, the system will automatically update the respective *qualification* on the volunteer’s profile. However, it is **important that it is verified as completed** before changing the applicant’s status to ACCEPTED.

Due to the nature of the software, once an individual completes this training, regardless of where they volunteered at UCalgary, they are not required or permitted to complete it again. For more details, refer to the page [*Volunteer OHS Orientation Process 2021*](#_Volunteer_OHS_Orientation)*.*

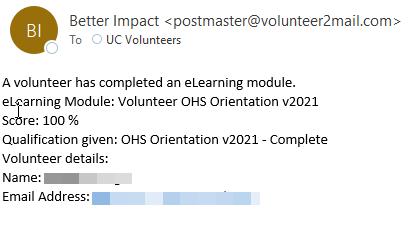
**Confirming completion:**

* **New applicants to UCalgary completing the OHS training for the first time**
  + An **email notification is sent** to the administrator confirming completion - **Fig. 2**
    - AND the qualification status is updated to ***Complete***

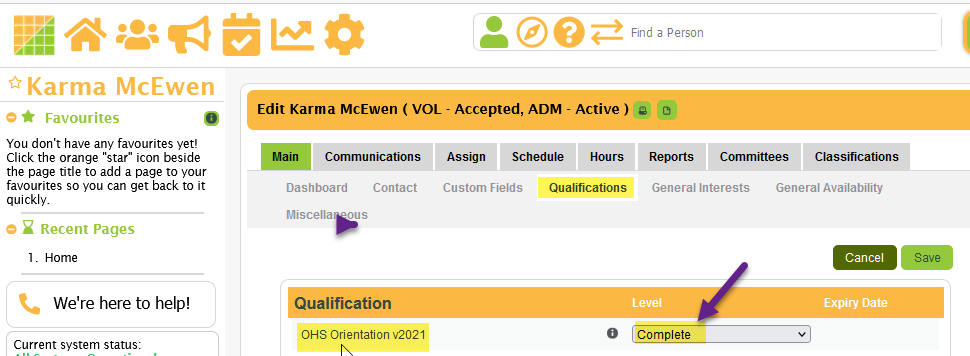
***OR****…*

* + **Existing or returning UCalgary volunteers who completed the training previously - Fig. 3**
    - From the individual’s profile:
      * Under *Qualifications* tab
        + OHS Orientation 2021 = **COMPLETE**

**Fig. 2 – Notification Email**



**Fig. 3 – View profile**



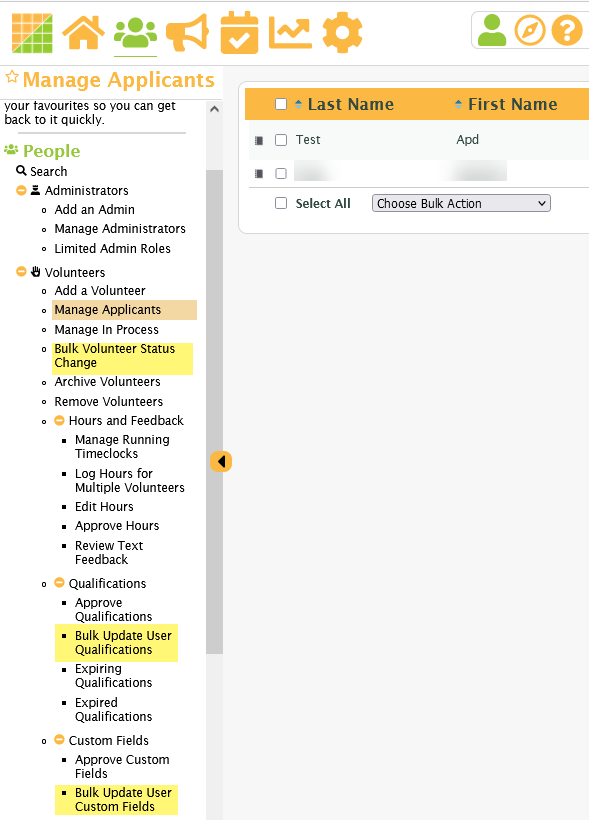
### Updating Volunteers’ Status

After the applicant has fulfilled the abovementioned requirements, and any others that you require to meet your program requirements, their **status must be manually changed to ACCEPTED**. This can be done from the dashboard, their personal profile, or in bulk.

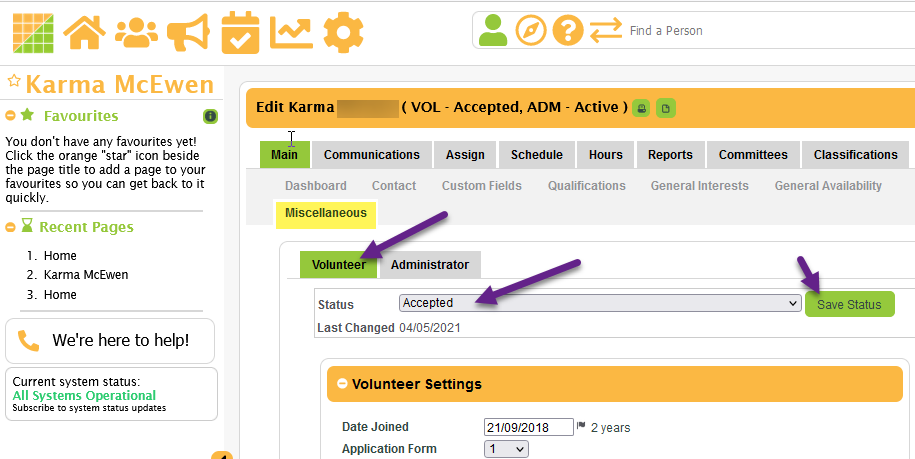
***TIP****: To help manage your applicants, Better Impact provides a status category of* ***In Process*** *– which can delineate those whose applications have been reviewed but still have requirements outstanding. This is an optional feature and must also be changed manually.*

* **From the Better Impact dashboard (home page) - Fig. 1:**
  + Under *Status Update*
    - “Applicant” or “In Process”
* **In Bulk - Fig. 4:**
  + Under the *People* tab
    - Volunteers
      * Manage Applicants, **OR**
      * Bulk Volunteer Status Change - can be filtered as applicable
* **From the individual’s profile – see Fig 5:**
  + Miscellaneous
    - Volunteer
      * Status
        + SAVE

Fig. 4



**Fig. 5**



## Creating Application Forms in Better Impact

Planning is essential. The more thought given to what you need to know about your volunteer applicants (application forms), and what your volunteers need to know about your opportunities (general interests and activities), the more successful you will be in matching volunteers to the appropriate opportunities.

Application Forms can only be edited by Dept Coordinators.

There are three possible application forms in Better Impact. *Volunteer Form 1* is automatically set as the *Default Application* and is used, in most cases, as a general intake form. The following instructions apply to **ALL** versions of applications. *Note: Department = Organization*

*To edit Application Forms, go to:*

* *Configuration* menu – 
  + *Recruitment*
  + *Application Form Settings.*
* Standard **Contact information** 
  1. is included on ALL applications;
  2. is **not** **displayed** in the *Application Form Settings;*
  3. and does **not** need to be specifically selected. These include:

1. First and Last Names
2. Legal First Name
3. Address
4. Email Address
5. Phone

* **Additional Information** – collected on all applications to the University of Calgary

1. Emergency Contact Name & Phone Numbers
2. University Affiliation – Choices include Student, staff/faculty, public, degree graduates

#### Agreements & Acknowledgements – Volunteers

The following are required custom fields that appear once on ALL application versions. These fields are created at the Enterprise level and cannot be removed by the department. They require a checkbox response. The system will reject submission of the application form if volunteer does not accept these terms.

1. I have read and understood the Waiver v2-Nov 2018 found in the description box (info icon) beside this field.
2. I am age 18 or older.
3. I will complete all Occupational Health & Safety requirements as directed by my volunteer coordinator.

### Sections for Dept Coordinator to edit/update:

* *New Volunteer Email Message* field:
  + ALL APPLICATION FORMS should include messaging from the department about next steps but what is included is completely up to each department. It is useful to include:
    - information about the OHS training requirement (see below for possible wording and the link to the training); and
    - any other preliminary steps you wish your volunteers to take before being accepted to your program; and
    - any information the volunteer needs to participate in your program/event
* *Application Complete Settings* section -Dept Coordinators may update this information if the default messaging is not sufficient.
  + Enter a customized messaging acknowledging receipt of the application and any other information the applicant should know. Keep in mind this is a pop-up so keep it brief

Do NOT modify the following sections (unless otherwise noted):

***\* Items marked with an asterisk*** *have already been* ***included on all forms*** *by the Enterprise Administrator at the time the department account was set up. Should these elements be inadvertently deleted or modified, please update as per the following instructions. Any* ***items not identified by an asterisk******must be performed by the Dept Coordinator****.*

1. \*Under ***General Settings***: *New volunteers require approval*
2. \**Automatically send an email to new volunteers after the volunteer application form is filled out*
   1. This section should be updated to reflect your department’s practices (see notation under *Sections for Dept Coordinators to edit/update* above). It currently contains the following sample text for your reference:
      1. “**All University of Calgary volunteers must complete the Volunteer OHS Orientation.v2021. It can be accessed at** [**Volunteer OHS Orientation.v2021**](http://bttr.im/4jelc) **“**

**\*All steps in *Step One Settings* are Required.** These will be pre-filled with the following. **Do NOT change this section** unless the following information is missing or modified.

* \*Under the *Step One Settings*section:
  1. \*Toggle off: “Show the birthdate field…”
  2. \*Select “Only show required contact information…” (optional setting)
* \*Under *Policy Setting*s
  1. \*Select “*Require volunteers to accept your volunteer policies as the first step in filling out the volunteer application form”*
  2. \*Do **NOT** select *“Display Acceptance Policy in page”* as this will unnecessarily display the waiver text in its entirety, on the login page.
  3. \*Under *Policy Title* include the text: **RELEASE OF LIABILITY, WAIVER OF CLAIMS AND ASSUMPTION OF RISKS AGREEMENT**
  4. \*Under *“Policy Acceptance Checkbox Label”* include the text (including the information about the waiver button: “**I have read and understood the waiver below (click on Waiver button)”**
  5. \*Under *Policy Button Text* enter: **WAIVER**
  6. \*Under *Volunteer Policies Text* include the **“RELEASE OF LIABILITY, WAIVER OF CLAIMS AND ASSUMPTION OF RISKS AGREEMENT”** textas provided in theEnterprise Document Library file [*RELEASE OF LIABILITY-applcopy.docx*](http://bttr.im/6mcr8)

***Step Two Settings –* All of these settings are *OPTIONAL***

* *Step Two Settings* section are for matching a volunteer’s interests, etc. to the opportunities your department has available. These settings have not been optimized by the University of Calgary so are best collected through the volunteer’s profile once they have been accepted as a volunteer for your department.
  1. *Show General Interests or Show General Availability*
  2. *Classifications*
  3. *General Availability & General Interests*
  4. *Qualifications and/or Custom Fields* - you may wish to add text to these *Headers*
* **Required** (this section will also be pre-filled and should only be edited if the following text is missing or modified)**:** 
  1. \*Under *Override notice to complete application form text* include the ***Privacy Statement*** as shown in the **box on the following page** – ensure that links in the statement are working
  2. \*Select *Put this message inside a “notice” container****.***
  3. \*Do **NOT** select ***Also include this message at the bottom of the application form****.*

*NOTE*: Link to Privacy Policy: <https://www.ucalgary.ca/legal-services/university-policies-procedures/privacy-policy>

***Privacy Statement***

*This information is collected under the authority of section 33(c) of the Freedom of Information and Protection of Privacy Act. It is required for the recruitment, scheduling, and associated reporting of volunteers and volunteer activities at the University of Calgary. For questions, please contact the FOIP Office at 403-210-8405 or at* [*foip@ucalgary.ca*](mailto:foip@ucalgary.ca) *or refer to the* [*University of Calgary Privacy Policy*](https://www.ucalgary.ca/legal-services/university-policies-procedures/privacy-policy)*.*

* *SAVE* the form after editing and before reviewing interactive forms
  1. Review the form by selecting one of the green buttons at the bottom of the screen to get the same view a volunteer applicant would see
* *Generate Link* button will create a link to be used on a website or other recruitment digital mediums to automatically connect users to this application form
* **TIP:** Use *Volunteer Form 1* as your general intake application**.** Use Application Forms 2 and/or 3 for opportunities that require more extensive screening, previous experience, specialized skills, or to delineate one program from another.

**For Help articles on functions in Better Impact, click on the**  **icon in the Search bar (anywhere in Better Impact) and enter applicable search parameters.**



## Creating Activities in Better Impact

**Activities** are the specific roles/tasks performed by the volunteer at an event or within a program. Consider these in terms of a function that can be assigned and scheduled. Activities can be organized by the category (event/program) to which they are assigned.

**\*\*To meet reporting requirements, certain practices *must* be followed when creating activities, and will be identified as:**

* **Required Practices**
* **Recommended Best Practices**

**Step-by-step instructions for these functions** are provided in the next pages and can also be accessed by going to [*Volunteer Impact Help*](https://support.betterimpact.com/volunteerimpacthelp/en/help-articles/) which is also accessible from the SEARCH bar.

* Select the question mark  before entering your query.

#### **Add New Category**

* “*Category*” in Better Impact refers to a collection of functions. As considerable reporting, including assigned shifts, can be run by Category, it is *recommended* that these are named as the specific name of the event/program (i.e., Convocation 2018, Peer Mentor Program 2019-2020, etc.). This reporting can be further broken down by Activity and shifts.
* Step-by-step instructions for Adding a New Category can be accessed from the Search bar.
  + **Recommended Practices**
    - The name of the *Category* can be specific to the event or program by including the date (i.e., Peer Helper Group Fall 2018)
    - The *Description* includes a brief description of the event or program, and any specific information an applicant needs to know before signing up for any associated activities
    - Considerable reporting, including assigned shifts, can be run by Category. This reporting can be further broken down by activity and shifts.

#### **Add New Activity**

* You may review the Better Impact step-by-step instructions *Role Creation* at the following link:[https://www.betterimpact.com/volunteer-impact-help/activities-add-new/](https://www.betterimpact.com/volunteerimpacthelp/categories/role-creation/)
  + **Required Practices** 
    - To satisfy Occupational Health & Safety (OHS) requirements, the ***Description – pre-assigned***box must include:
* a brief description of the task
* outline any physical demands or notable potential hazards
* include any specific skill/training requirements
* include the *Document Library* URL link to the activity-specific **Hazard Assessment Control Form** (HACF) as outlined in the document [**Occupational Health & Safety Requirements**](#_Occupational_Health_and_1)
  + - ***Activity Report Group*** (under the *Basic Info tab)* - for WCB reporting purposes, the appropriate group should be selected from the dropdown list. **Appendix B** of the VRMS Admin Guide provides **examples** of activities that might be included in each group
    - Include the ***Feedback Field*** ***“****Employee Volunteer Hours****”*** on **any** activities where University of Calgary **employees** are recruited to assist during paid work hours.
  + **Recommended Practices**
    - The ***Visibility and Automation*** tab provides settings for the type of volunteer the activity will be *Visible To*. If *Public* is selected, the activity will be displayed on the University of Calgary’s Better Impact ***Search Page*** and visible to everyone, including the general public.

Note: Better Impact accounts must be configured to be visible/**searchable by the Public**. If you recruit from the general public, please **contact the Enterprise Administrator** to ensure your account is set up accordingly.

* + - ***Classifications*** – (*not generally used at UCalgary*) are used to match potential volunteers to the department’s activities that meet their interests and availability. If a different Activity Classification is required than what is already available, contact the System Administrator at [ucvolunt@ucalgary.ca](mailto:ucvolunt@ucalgary.ca) to have it created.
    - ***Activity*** – should reflect the Activity Reporting Group previously selected. Select all that apply.
      * ***Suitability*** – targets the specific type of volunteer suitable to the task. If activity is for a specific program that requires a certain type of volunteer (i.e., only students, or only alumni, only 3rd year students, etc.) it should be indicated here.
      * ***Time Commitment*** – This section should reflect the activity’s expected hours
      * ***Duration Commitment*** *–* This section should reference the required program commitment. Some of the student volunteer positions require commitments of an entire term or several terms
      * ***Schedule –*** Matches volunteers’ weekly availability to the activity’s required days of attendance. These classifications cannot be changed or added to

* It is recommended that *Activities* are named generically and managed/organized by specifically named *categories*. For example: Sign-In Desk for *UCalgary Strong Festival 2018*; Orientation Leader for *Orientation Week Fall 2018*. However, there is no requirement that you organize your account this way.
* Templates can be created for frequently used activities or for events/programs that will repeat from one year to the next. The same roles/tasks can also be used for various categories (events) by copying or moving. For example: *Sign-In Desk* for the 50th Anniversary Celebrations; *Sign-In Desk* for UCalgary Festival; *Sign-In Desk* for Open House, etc. Refer to [*Activities: Move to a Different Category*](https://support.betterimpact.com/volunteerimpacthelp/en/help-articles/move-an-activity-to-a-different-category/)

NOTE: When copying or moving activities, remember to update the activity schedule and A*ctive* status to reflect the current event.

## Create an Activity – Directions

Refer to the page [Creating Activities in Better Impact](#_Creating_Activities_in) for guidance and explanation of terms used in the following instructions.

* *Configuration* (gear icon)
* *Activities*
* *Manage Activities*

1. First create (or select) a Category:
   1. Select *New Category* (green button at bottom of screen)
   2. Enter *Category* name
   3. Enter *Description*. This can include information about your event/program, images, links to more information, etc.
   4. Select *Save*
2. Select *New Activity* (green button at bottom of screen)
   1. Select *Basic Info* (default)tab (top menu bar)
      1. Enter *Activity* name
      2. Select *Category* from drop-down menu
      3. Select *Activity Report Group* (these are created at the Enterprise level and align with our reporting categories for WCB purposes)
      4. Select *Application Form* version (Default Application Form = Application 1)
      5. Toggle *Active,* as applicable
      6. Toggle *Allow Hours Logging,* as applicable
      7. Toggle *Auto Log Hours*, as applicable (this setting should only be selected for large volume recruitment activities that require little oversight of attendance)
      8. Toggle *Backup List*, as applicable
      9. Enter in *Description - pre-assigned* a brief description of the required duties and expectations of the Activity – refer to[**Volunteer Hazard Assessments**](#_Volunteer_Hazard_Assessment) for specifics
      10. If desired, enter in *Description – post-assigned* any information a volunteer should know once they have been assigned to the activity
      11. If desired, enter in *Internal Notes* information necessary for other administrators – this is not a volunteer-viewable field
      12. Select *Next* (green button at bottom of page)
   2. *Schedule* tab
      1. As applicable, select *Recurring Pattern, Disjointed, One Time, Seasonal, No Schedule* (green buttons at top of page)
      2. If previously created, select from *Choose a Template* drop-down an applicable schedule OR
      3. Enter schedule *Pattern* as per proffered fields based on the previously selected schedule pattern
      4. These parameters can be saved as a template for future use by selecting *Save this as a template* (green button)
      5. Enter *Pattern Range* (date/time period) as per proffered fields based on the previously selected schedule pattern
      6. Select *Check Shifts* (green button) for a total number of shifts created
      7. Select *Next* (green button at bottom of page)
   3. *Visibility and Automation* tab – these selections will determine who can see the activity and will automate shift assignment and scheduling
      1. Select parameters as applicable to your needs (self-explanatory) – for descriptions of settings see: <https://support.betterimpact.com/volunteerimpacthelp/en/help-articles/add-new-activity-8/#step-3-visibility-and-automation>
      2. Select *Next* (green button at bottom of page)
3. Additional optional features:
   1. *Qualifications* tab
      1. Select displayed *Qualifications,* as applicable to this Activity

***Note****: OHS Orientation.v2021* should be included on all activities

* + 1. Select *Next* (green button at bottom of page)
  1. *Feedback Fields* tab –
     1. Include the ***Feedback Field*** *“Employee Volunteer Hours”* on **ALL** activities where UofC staff might volunteer during their regular working hours
     2. Select the box beside any other *Feedback Field* applicable to this activity.

***Note***: \*\*When a volunteer logs hours for the activity, the Feedback Field(s) will display and require a response

* 1. *\*\*Classifications* tab – these selections are optional. They are search criteria for volunteers to filter opportunities based on their interests and availability
     1. Select displayed *Classifications* under each tab (*Activity, Suitability, Time Commitment, Duration Commitment, Schedule*) as applicable to this Activity.
     2. Select *Next* between tabs(green button at bottom of page)

\*\*These criteria have not yet been optimized so may not result as expected.

1. Select ***Save***(green button at bottom of page)

## Occupational Health and Safety Requirements

Under the *OHS Act, Regulations and Code, v*olunteers are considered *workers,* and asthe volunteers’ *employer*, the University of Calgary is responsible for providing safe working conditions and advising volunteers of their rights and responsibilities under the OHS Act. These processes are governed by the University’s *Occupational Health and Safety Management System (OHSMS)*.

Environment, Health & Safety is the governing department for OHS requirements. For further information and interpretation of the OHS requirements, contact the *Environment, Health, and Safety* department at [ucsafety@ucalgary.ca](mailto:ucsafety@ucalgary.ca) or phone 403-220-6345.

### Occupational Health and Safety and Better Impact

To fulfill OHS requirements, follow the steps below:

#### Volunteer Coordinator OHS Orientation

 Coordinators (Dept and Volunteer) are **required** to complete the [*Volunteer Coordinator OHS Orientation*](https://learning.my.ucalgary.ca/psp/lmprd/EMPLOYEE/ELM/c/LM_SS_LEARNING.LM_LEARNING_ITEMS.GBL?Page=LM_SS_ITM_DTL&LM_CI_ID=1327) course (*EHS036*) (**course ID – 1327**) available in Enterprise Learning. Tracking is not required as the record is retained in PeopleSoft, but a custom field has been set up in Better Impact, should you wish to keep your own records.

#### Volunteer OHS Orientation

Before being approved to volunteer for the University, volunteers **must** complete the [*Volunteer OHS Orientation v2021*](http://bttr.im/4jelc) hosted as an eLearning module in Better Impact. This training can be accessed directly through a link generated in Better Impact (see instructions for Generating Links); or under the “*Training*” tab on the volunteer’s *myImpactPage (MIP)*.

**See** [**Volunteer OHS Orientation Process 2021**](#_Volunteer_OHS_Orientation) **for process steps.**

#### Volunteer OHS Orientation Qualification

Once a volunteer successfully completes the OHS training:

* Their profile will **automatically update** the qualification “*OHS Orientation v2021****”***with the notation “*Complete*” and
* An **automated email notification** is generated and sent to:
  + the Volunteer Coordinator, and
  + to UC’s Environment Health and Safety dept (OHS)

Volunteers are only required to do this training once. If they attempt to repeat it, they will get a message saying the training has already been done.

* Before changing a volunteer’s status to *ACCEPTED*, first confirm that the *OHS Orientation v2021* qualification shows *“Complete”*
* **Do NOT approve** any volunteer until the Orientation has been completed and the qualification is updated on their Better Impact profile

### Volunteer Hazard Assessment

To assist in provisioning the activity-specific Volunteer Hazard Assessment, include it in Better Impact by following the steps below.

\*\*For assistance with determining the necessary frequency and preparation of the Volunteer Hazard Assessments for specific volunteer activities, please contact the Environment, Health & Safety department at [ucsafety@ucalgary.ca](mailto:ucsafety@ucalgary.ca) or phone 403-220-6345.

* + It is **important** that the steps below are performed in the same order as outlined here:

1. **BEFORE** creating an *Activity* in Better Impact, prepare the Volunteer Hazard Assessment formavailable on the EHS website (for convenience, this form is also available in the Enterprise Document Library)
2. Prepare the Hazard Assessment specific to your activity
3. Upload the prepared *Volunteer Hazard Assessment* to **your department’s** *Document Library*
4. Once *Saved*, click on the options icon and select “*Generate a Link*”. Copy this link for future use
5. Create the activity in Better Impact:
6. In the Description Field of the activity include any pertinent expectations about the activity.
7. Under the “*Basic Info* tab include a similar statement in the *Description – pre-assigned* box:

“To be considered for this activity you are required to complete the [Volunteer OHS Orientation](http://bttr.im/4jelc), if you have not already, and review the **Volunteer Hazard Assessment** for this activity. This document will be presented to you for signature before starting to volunteer for us.”

(*Include a link to the previously prepared Hazard Assessment).*

\*\*Note: Prepared activity-specific Hazard Assessment Forms can be stored in the Document Library but signed versions should be retained in your department’s network folders.

Complete any remaining OHS requirements as directed in the [Volunteer Coordinator OHS Orientation](https://learning.my.ucalgary.ca/psp/lmprd/EMPLOYEE/ELM/c/LM_SS_LEARNING.LM_LEARNING_ITEMS.GBL?Page=LM_SS_ITM_DTL&LM_CI_ID=1327) (Course ID 1327)

## Volunteer OHS Orientation Process 2021

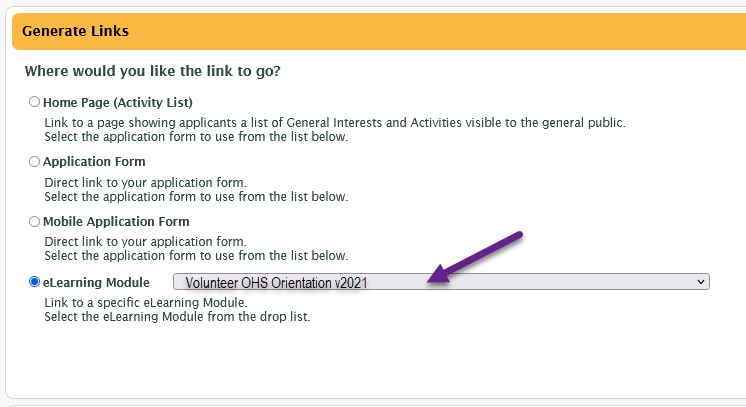
**All volunteers**, new AND existing, are required to complete the **Volunteer OHS Orientation v2021** version of the OHS Orientation, regardless of any other OHS training they have done in the past.

* **Volunteer coordinators** are responsible for ensuring volunteers fulfill this **OHS** requirement. **No volunteer should be approved for assignment before completing this step**.

### Steps for Coordinators:

OHS - New Applicants:

1. Applicants are required to agree to completing any OHS requirements as directed by their coordinator.
   1. This is presented as a statement on the application forms and requires agreement by selecting a checkbox.
   2. Application form will be rejected by the system if applicant does not agree to the OHS terms
2. A link to **Volunteer OHS Orientation v2021 eLearning module** should be providedin the*New Applicant automated* email for newly submitted **application forms** (refer to document [*Creating Application Forms in Better Impact*](#_Creating_Application_Forms)*)*
   1. This link can be generated under the:
      1. *Configuration icon*
      2. *Recruitment (left-sidebar menu)*
      3. *then* ***Links for Website***
      4. *choose eLearning module* (see screenshot)
      5. select from dropdown *Volunteer OHS Orientation v2021*



OHS - Applicable to ALL Volunteers:

The OHS training module is also **permanently** **available** on **myImpactPage.com (**under the **Training tab)** for completing it initially, orto review the content and results later. The document *Directions to Access Volunteer OHS* provides directions for volunteers to access the training. This file is made available to volunteers under ***Files*** on the Home page of your account’s *myImpactPage*.

1. Direct volunteers to the volunteer portal, **myImpactPage.com**
   1. My Profile menu
   2. Training
   3. Volunteer OHS Orientation v2021

### OHS Completions:

Upon successful completion of the OHS training, Coordinators should receive an **automated email notification** that the **requirement** has been **met.** (This notification is dependent on your administrator notifications settings)

This notice is also sent directly to our OHS department for their records

Departments are **not** required to retain the notifications in their files

The corresponding **qualification** named, **OHS Orientation v2021,** **automatically updates** on the volunteer’s profile to “***Complete****”*

Volunteers must achieve 100% to update the Qualification to “*Complete*” and are able to re-try as many times as needed

OHS Orientation v2021 Qualification***:***

* + This qualification **updates automatically** **in response to a volunteer successfully completing the OHS eLearning module**.
  + It follows the volunteer throughout the University, so they will not have to take this course again, regardless of which, or how many, departments/programs/events they volunteer with.
  + If you do not receive a notification of completion, check this qualification’s status before following up with the volunteer/applicant. They may have completed the training while volunteering with another UCalgary department

### Checking for prior completions of the OHS training

To **confirm** the **OHS requirement** has been **fulfilled** by an **individual**, go to:

* + - applicant’s profile (use Search bar)
    - Qualifications tab
      * “*Complete*” should be recorded in the *OHS Orientation v2021* field
      * If the field is blank, the volunteer has NOT completed the training

To **review that** the **OHS requirement** has been **fulfilled** by **multiple** **volunteers**, go to:

* + - ***People*** icon
    - *Volunteers’* menu
    - *Qualifications*
      * *Bulk Update User Qualifications*
        1. Filter search, as applicable

**departments are expected to follow up with their volunteers if this version of the OHS Orientation has not yet been completed. Departments should not permit a volunteer to continue to assignment until they fulfill this requirement.**

## Volunteer Hours: Logging, Approving, Reporting

### Logging Hours

* **Required Practice:**

**Volunteers’ Hours** must be recorded (logged) and subsequently approved by volunteer coordinators. They may be recorded:

* by the volunteer
* entered by the Coordinator
* auto logged

See the directions for [*Create an Activity – directions*](#_Create_an_Activity)document for the applicable settings to permit volunteers to record their own hours; or to automatically log hours.

Step-by-step instructions for the functions listed below can be accessed through the program by clicking on the question mark  in the Search bar and entering your query.

* Coordinator Logs Hours
* Volunteer Logs Hours
* Approving Hours

**Auto-Logging Hours**

To set up auto-logging hours, refer to the instructions for *Auto Log Hours Activity Settings*. Auto-logging is **not recommended** as the system will credit any volunteer that is scheduled, even if they did not attend.

### Approving Hours

* **Required Practice** 
  + - Volunteers’ hours **must be approved by a Coordinator**

**Note**: If there are hours logged by volunteers, but not yet approved, the *Hours Approvals* on the Home page dashboard under *Status Update.*

### Hours Reporting

The Enterprise Administrator reports volunteers’ hours to Payroll for subsequent reporting to WCB.

* **Required Practice**
* **All hours must be recorded and approved by Coordinators not later than January 15th** or as directed by the Enterprise Administrator. To ensure all logged hours are up to date and approved, you will receive reminders just before and just after the Christmas break.

## Managing UC Volunteers – Legislative Components in Better Impact

*There are several legislative requirements governing the engagement of volunteers at the University of Calgary. Many of these requirements can be managed within the Better Impact system. It is important that department coordinators are familiar with these requirements and the steps necessary to meet compliance.*

Note: The Better Impact system has a feature called *Document Library.* Updated versions of any documents referenced in this document can be found in the *Enterprise* *Document Library;* on the [Risk Management & Insurance Website](https://ucalgary.ca/risk/risk-management-insurance); or the governing department’s website.

### Definition of a University of Calgary Volunteer

Individuals who, with or without special training, provide services or assistance to the University without payment of fees, wages, or salary, and without any expectation of any kind of compensation (except travel costs or meal expenses).

*Volunteers must be:*

* *over 18 years old, and either:*
* *have Canadian Citizenship or Permanent Resident Status in Canada; or are*
* *a current international student enrolled full time at the University of Calgary and hold a Study Permit. In this case, the volunteer activities must be short-term and incidental to their student work.*

### Occupational Health and Safety (OHS)

Under the *Alberta* *OHS Act, Regulations and Code, v*olunteers are considered *workers* and entitled to the same safety provisions as employees at the University of Calgary. These processes are governed by the University’s *Occupational Health and Safety Management System (OHSMS)*. The VRM system includes processes to help track the OHS requirements for volunteers and Volunteer Coordinators; and to facilitate access to prepared Hazard Assessments.

Review the page [Occupational Health & Safety Requirements](#_Occupational_Health_and_1) for more information about the responsibilities of Volunteer Coordinators for incorporating OHS elements into the VRM processes, including:

* completing the [Volunteer Coordinator OHS Orientation](https://learning.my.ucalgary.ca/psp/lmprd/EMPLOYEE/ELM/c/LM_SS_LEARNING.LM_LEARNING_ITEMS.GBL?Page=LM_SS_ITM_DTL&amp;LM_CI_ID=1327); (course ID 1327)
* directing volunteers to complete the **Volunteer OHS Orientation** **hosted as an eLearning module in Better Impact**
* and, specific to each activity, the preparation and retention of **Volunteer Hazard Assessments**

### Workers Compensation (WCB)

To meet the terms of the University’s WCB coverage, **volunteers must be registered**, and the **dates of their activities and hours worked recorded**. These requirements are facilitated through the VRM system and recorded in Better Impact. Specifics are included in the instructions for [*Volunteers’* *Hours: Logging, Approving, and Reporting*](#_Volunteer_Hours:_Logging,_1)

### Freedom of Information and Protection of Privacy Act (FOIP)

The types of information that can be collected about individuals is determined by the FOIP Act and governed at the University by the Privacy Office <http://www.ucalgary.ca/legal-services/access-information-privacy>.

To meet compliance when engaging volunteers at the University, the following requirements must be met:

* All Department Administrators and Volunteer Coordinators with access to Better Impact data must sign an ***Oath of Confidentiality***
* A ***Privacy Statement***must be placed on all Better Impact applications – See [**Creating Application forms in Better Impact**](#_Creating_Application_Forms)for required placement and wording
* An ***opt-out disclaimer*** must be included in all electronic communications sent to volunteers.
* ***Photo Consent*** [Filming and Photography](https://ucalgary.ca/risk/risk-management-insurance/events/filming-and-photography-university-property) forms must be signed by volunteers as outlined in the University’s Privacy Policy <https://www.ucalgary.ca/policies/files/policies/privacy-policy-2011.pdf>
* Information collected from a volunteer must specifically align with the purpose of its collection as it applies to the volunteer opportunity. Guidelines for, and examples of, acceptable data collection can be acquired from the Privacy Office.
* **Email communications should be cc’d to the sender’s ucalgary.ca address and include the names of those the email was sent to.** Volunteers’ profiles and associated **data** must be retained within Better Impact system for a minimum of twelve (12) years as per the University’s Master Records Retention Rule [GV-610-Risk Management](https://asc.ucalgary.ca/uclass/gvblock/#gv610).

### Legal Liability Compliance

***Release of Liability, Waiver of Claims and Assumption of Risks Agreement* -** Volunteers are required to accept the agreement before engaging in volunteer activities at the University. This agreement is incorporated in two places in Better Impact. To insert these statements, they must be added into the *Step One:* *Policy Statement* section of the application form at the department level. Additionally, a Custom Field created at the Enterprise level is included automatically on every application. To ensure the volunteer has accepted the agreement, Administrator’s must approve the Custom Field before the applicant can be accepted as a University volunteer. This record is included on the volunteer’s Better Impact profile, should they wish to reference it later.

For a current version of the **Release of Liability, Waiver of Claims and Assumption of Risks Agreement** go to the *Enterprise* *Document Library* in Better Impact, or the [Risk Management & Insurance website](https://ucalgary.ca/risk/risk-management-insurance/services/volunteer-registration-and-management)

### Human Resources

Occasionally, a role is better filled as a paid position rather than a volunteer position. If in doubt, departments should check with their HR representative for clarity and approval.

## VRMS Administrators’ Roles and Responsibilities

*Note: References to “Volunteer Coordinators” refers to any administrator that is involved in the management of volunteers. Dept Coordinators have additional responsibilities and access in Better Impact but are still considered “volunteer coordinators” for training and required documentation purposes.*

In addition to the Enterprise/System Administrator, there are two levels of administrator access in the University’s VRM system. Each role has different responsibilities and levels of functionality in the Better Impact system. The following describes the expectations of each role:

### Enterprise:

#### Enterprise/System Administrator:

1. Staff member of the Risk Management & Insurance department
2. Administrative liaison between the University of Calgary and the online system provider, Better Impact
3. Liaison between the department accounts and the University’s enterprise account
4. Manages the assignment of Better Impact accounts to university faculties/departments/programs
5. Authorizes, adds, and removes Department Coordinators’ access to the departments’ Better Impact accounts
6. Authorizes, adds, and removes Volunteer Coordinators’ access to the department’s Better Impact account
7. Ensures Oaths of Confidentiality are completed and on file
8. Ensures *Volunteer Coordinator OHS Orientation* Certificate of Completions are submitted and on file
9. Coordinates processes for meeting regulatory compliance
10. Develops and facilitates training for administrators
11. Coordinates processes for reporting/auditing requirements
12. Creates enterprise Qualifications and Custom fields
13. Creates department Qualifications and Custom Fields
14. General support for Dept Admins

### Department (Organization) Account:

#### Dept Coordinator:

1. The primary contact for the department, and liaison to the Enterprise/System administrator
2. Oversees/trains Volunteer Coordinators
3. Obtains and forwards Volunteer Coordinators’ Oaths of Confidentiality
4. Advises and confirms Volunteer Coordinators complete the Volunteer Coordinator OHS Orientation
5. Communicate legislative compliance requirements to Volunteer Coordinators
6. Develops processes for OHS requirements including, but not limited to, the Volunteer OHS Orientation and Hazard Assessments
7. Develops processes for retaining historical data and documentation for audit, as per respective University policies
8. Configures department’s Better Impact account – contact information, customizing/branding, application form development, etc.
9. Performs functions necessary to managing volunteers, as determined by system requirements and department's processes, including:
   1. Recruiting
   2. Approving custom fields and qualifications as part of the applicant approval process
   3. Updating volunteers’ status, as applicable (i.e., accepted, in process, inactive, archive)
   4. Creating activities
   5. Communicating with volunteers
   6. Assigning volunteers to activities
   7. Scheduling shifts
   8. Logging and/or approving logged hours
   9. Ensuring regulatory compliance elements are included in Better Impact (as per instructions from Enterprise)
   10. Ensuring volunteers agree to and complete waivers; Volunteer OHS Orientation, and any other required documentation
   11. Provisioning site-specific OHS Volunteer Hazard Assessments forms
   12. Provisioning volunteers with any necessary training to perform the role
   13. Reviewing site-specific Hazard Assessments with volunteers and obtaining signatures on the Volunteer Hazard Assessments forms
   14. Ensuring all OHS requirements are met
   15. Retaining signed Hazard Assessments and other OHS documentation for audit/reporting

#### Volunteer Coordinator (VC)

1. Performs functions necessary to managing volunteers, as determined by system requirements and department's processes, including:
   1. Recruiting
   2. Approving custom fields and qualifications as part of the applicant approval process
   3. Updating volunteers’ status, as applicable (I.e., accepted, in process, inactive, archive)
   4. Creating activities
   5. Communicating with volunteers
   6. Assigning volunteers to activities
   7. Scheduling shifts
   8. Logging and/or approving logged hours
   9. Ensuring regulatory compliance elements are included in Better Impact (as per instructions from Enterprise)
   10. Ensuring volunteers agree to and complete waivers; Volunteer OHS Orientation, and any other required documentation
   11. Provisioning site-specific OHS Volunteer Hazard Assessments forms
   12. Provisioning volunteers with any necessary training to perform the role
   13. Reviewing site-specific Hazard Assessments with volunteers and obtaining signatures on the Volunteer Hazard Assessments forms
   14. Ensuring all OHS requirements are met
   15. Retaining signed Hazard Assessments and other OHS documentation for audit/reporting