Global nominating committee

Getting to volunteer module

Opening a new role

1. Locate and copy application form from previous year – recommended titling by year:

2. Locate and update "acknowledgement email (global) template:

Name	Community	Category	Opt-Out Group	System	Active	Actions
Accept/Approve (Default)		Volunteer	System	False	True	Edit
Accept/Approve Flagship		Volunteer	System	False	True	Edit
Acknowledgement (Default)		Volunteer	System	False	True	Edit
Acknowledgement (Regional)		Volunteer	System	False	True	Edit
Acknowledgement email (global)		Volunteer	System	False	True	Edit

3. Locate and copy previous years' role in system; you may have to filter to see roles whose deadlines have already passed

4. Update opportunity text to include updated dates, links to role descriptions, FAQs, etc.

- Chose new application form
- Set primary contact (who should receive notification of applications and who is listed on the opportunity page)
- Set dates (if not done in previous step)
- Set acknowledgement email template to "acknowledgement email (global)

5. Click "next step: application builder"

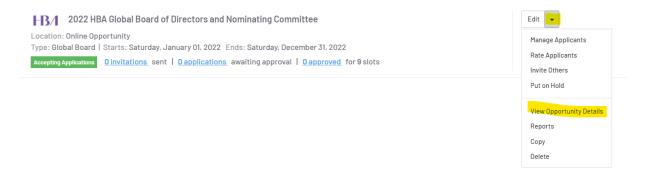- No edits needed on this page

6. Click "next step: invitations"

- **IMPORTANT**: slide blue dot all the way to the left to make the number of preselected volunteers 0

Create New Volunteer Opportunity

| Details | Application Builder | Invitations | Add Specific Volunteers |

Preselected Volunteers   0 volunteer(s) matched this opportunity's requirements

Adjust requirements   Tighter ————————— Loosen

Note: You should invite 81 people to get the 9 applications needed. Loosen or tighten the slider as needed.

Invitation to volunteer   [List of Invitees 0] [Find and Invite Others]

[<-- Back] [Last Step: Add Specific Volunteers -->] [Cancel]

7. Click "last step: add specific volunteers"

8. Click "finish"

9. To view the opportunity live, find the opportunity by using the filter and choose "view opportunity details" from the drop-down:

HBA   **2022 HBA Global Board of Directors and Nominating Committee**

Location: Online Opportunity
Type: Global Board | Starts: Saturday, January 01, 2022 Ends: Saturday, December 31, 2022

[Accepting Applications]   0 invitations sent | 0 applications awaiting approval | 0 approved for 9 slots

[Edit ▼]

- Manage Applicants
- Rate Applicants
- Invite Others
- Put on Hold

- View Opportunity Details
- Reports
- Copy
- Delete

Reviewing an application

1. Find role in system; you may have to filter to see roles whose deadlines have already passed

2. Click "X applications awaiting approval"

3. Click "view application"

| Waiting for Approval (1) | 0 confirmed for 1 slots (1 needed) | Invitations Sent (0) | Rejected (0) | Waiting for Rating (0) | Completed (0) |

✓ Select All Showing 1 to 1 of 1

[Enter a Name or Company]   [Submitted - Most Recent ▼]

Details		Nominations	
✓	**Heather Wargo** 305 Southglen Dr, Cary, NC 27518, United States 1200 potential points ⓘ	0	Submitted 19 days ago [View Application ▼]

[Approve Selected ▼]

Copy and paste the text from the application to a Word doc and save as PDF; download resume/CV; share PDF and resume/CV with current nominating committee

Approving an applicant

1. Find role in system; you may have to filter to see roles whose deadlines have already passed

2. Click "X applications awaiting approval"

3. Select individuals by clicking to be approved and click "approve selected"

Waiting for Approval (1)	0 confirmed for 1 slots (1 needed)	Invitations Sent (0)	Rejected (0)	Waiting for Rating (0)	Completed (0)

✔ Select All Showing 1 to 1 of 1		Enter a Name or Company	Submitted - Most Recent ⌄

Details	Nominations	
✔ Heather Wargo 305 Southglen Dr, Cary, NC 27518, United States 1200 potential points ⓘ	0	Submitted 19 days ago View Application ⌄

Approve Selected ⌄

Pulling report of applicants

Your browser does not support HTML5 video.