

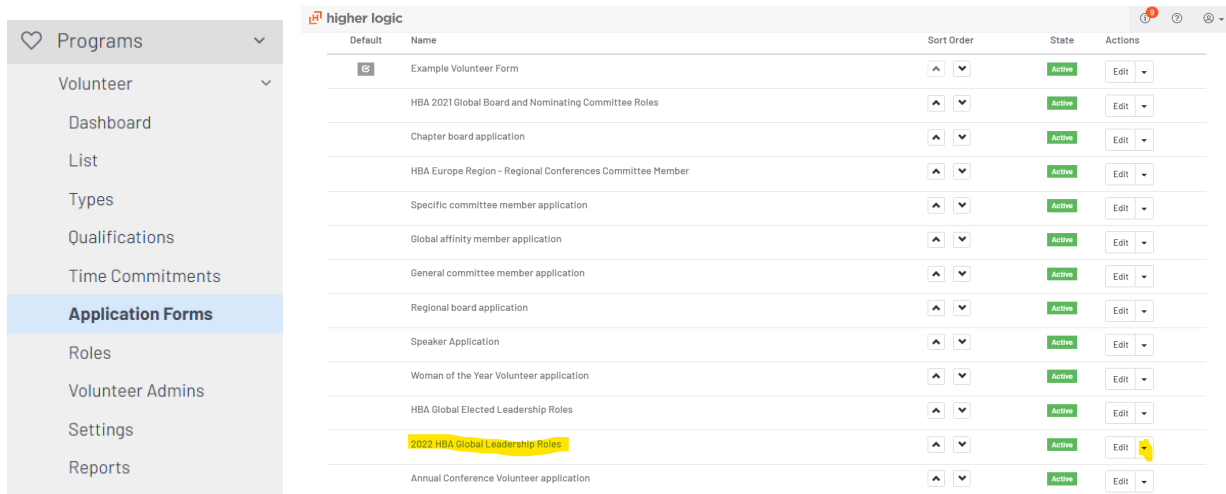
HL Volunteer Manager

Last Modified on 06/09/2026 7:24 pm EDT

Getting to volunteer module

Opening a new role

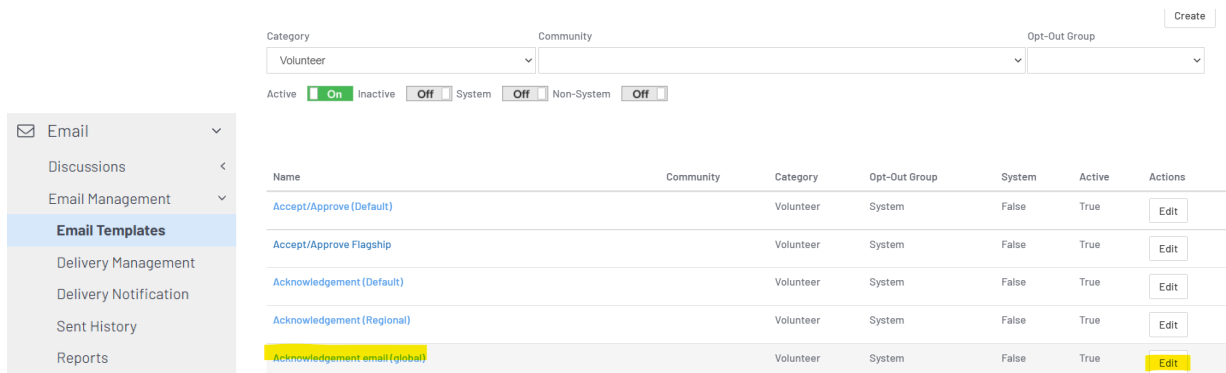
1. Locate and copy application form from previous year – recommended titling by year:



The screenshot shows the Higher Logic interface for managing application forms. On the left is a navigation menu with 'Programs' expanded to show 'Volunteer' and 'Application Forms' selected. The main area displays a table of application forms with columns for Default, Name, Sort Order, State, and Actions. The row '2022 HBA Global Leadership Roles' is highlighted in yellow, and its 'Edit' button is also highlighted.

Default	Name	Sort Order	State	Actions
<input checked="" type="checkbox"/>	Example Volunteer Form	↑ ↓	Active	Edit
	HBA 2021 Global Board and Nominating Committee Roles	↑ ↓	Active	Edit
	Chapter board application	↑ ↓	Active	Edit
	HBA Europe Region – Regional Conferences Committee Member	↑ ↓	Active	Edit
	Specific committee member application	↑ ↓	Active	Edit
	Global affinity member application	↑ ↓	Active	Edit
	General committee member application	↑ ↓	Active	Edit
	Regional board application	↑ ↓	Active	Edit
	Speaker Application	↑ ↓	Active	Edit
	Woman of the Year Volunteer application	↑ ↓	Active	Edit
	HBA Global Elected Leadership Roles	↑ ↓	Active	Edit
	2022 HBA Global Leadership Roles	↑ ↓	Active	Edit
	Annual Conference Volunteer application	↑ ↓	Active	Edit

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



The screenshot shows the Higher Logic interface for managing email templates. On the left is a navigation menu with 'Email' expanded to show 'Email Templates' selected. The main area displays a table of email templates with columns for Name, Community, Category, Opt-Out Group, System, Active, and Actions. The row 'Acknowledgement email (global)' is highlighted in yellow, and its 'Edit' button is also highlighted.

Category: Volunteer | Community: | Opt-Out Group: | Create

Active: On | Inactive: Off | System: Off | Non-System: Off

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

Volunteer Opportunities - Admin

Time Commitment: Nothing selected	Types of Opportunities Nothing selected	Qualifications: Nothing selected
Communities Nothing selected	Opportunity Status 1 item selected	Opportunity Name 1 item selected

Showing 1 to 1 of 1

Start Date - Earliest to Latest | All | 10 per page

Details	Actions
<p>HBA 2022 HBA Global Board of Directors and Nominating Committee</p> <p>Location: Online Opportunity Type: Global Board Starts: Saturday, January 01, 2022 Ends: Saturday, December 31, 2022</p> <p> Accepting Applications 0 invitations sent 0 applications awaiting approval 0 approved for 9 slots </p>	<p><input type="button" value="Edit"/></p>

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)”

Email Templates

Invitation	Do not send <small>Note: Message sent to volunteers invited to apply for the opportunity.</small>
Nomination	Do not send <small>Note: Message sent to volunteers nominated to apply for the opportunity. A value of 'Do not Send' will hide the Nominate Volunteers block on the Opportunity Detail page and users will be unable to nominate others for the affected opportunities.</small>
Acknowledgement	Acknowledgement email (global) <small>Note: Message sent to those who have signed up for the auto-approve opportunity.</small>

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

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 Submitted - Most Recent

Details	Nominations
<input checked="" type="checkbox"/>  Heather Wargo 305 Southglen Dr, Cary, NC 27518, United States 1200 potential points	0 Submitted 19 days ago <input type="button" value="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 Submitted - Most Recent ▾

Details		Nominations	
<input checked="" type="checkbox"/>	 Heather Wargo 305 Southglen Dr, Cary, NC 27518, United States 1200 potential points ⓘ	0	Submitted 19 days ago <input type="button" value="View Application"/> ▾

▾