

Introduction

This job aid is intended to provide a quick reference guide for the basic steps to perform the following functions in SMART FACTS (SF):

- Add, view, edit, and remove a volunteer
- Record volunteer activity
- Access volunteer forms

For more detailed instructions and comprehensive explanations on policies and data entry, see the SMART FACTS Operations Manual.

Definition of an SMP Volunteer

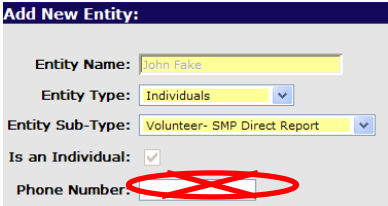
SMP volunteers are individuals who donate their time to assist with implementing the SMP program. Volunteers are trained to perform SMP work, which is conducted during their own personal time. They do not get paid by anyone during the time they perform this work. See the SMART FACTS Operations Manual, Appendix C for details.

All volunteers who meet the definition of an SMP volunteer should be entered into SMART FACTS, including volunteers who are working for your SMP under a sub-contract or agreement with another organization to fulfill the SMP mission, i.e. a SHIP. SMPs that sub-contract for outreach activities should require sub-contractors to report volunteer names and hours.

Anyone who works for your SMP but does not meet the definition of an SMP volunteer should NOT be entered in SMART FACTS as a volunteer, however they may be entered as a partner. See the Partnership Development job aid for details.

Adding a New Volunteer

To add a new volunteer in SMART FACTS, take the following steps:

Step	Action						
1	Select Volunteer Tracking & Mgmt program (if not selected).						
2	On the right side navigation bar, select Volunteers/Partners , then click the sub-topic Add New Volunteer/Partner .						
3	<div style="display: flex; align-items: flex-start;"> <div style="flex: 1;"> <p>Complete the REQUIRED (yellow) fields in the Add New Entity section on the left (in the Volunteer Tracking & Mgmt program, Entity = Volunteer).</p> </div> <div style="flex: 1;">  </div> </div> <table border="1" style="margin-top: 10px; width: 100%;"> <thead> <tr> <th>Data Fields</th> <th>Explanation</th> </tr> </thead> <tbody> <tr> <td>Entity Name</td> <td>Enter the volunteer’s full name (first then last name). This auto-fills the First and Last Name fields in step 4.</td> </tr> <tr> <td>Entity Type</td> <td>ALWAYS select Individuals for volunteers.</td> </tr> </tbody> </table>	Data Fields	Explanation	Entity Name	Enter the volunteer’s full name (first then last name). This auto-fills the First and Last Name fields in step 4.	Entity Type	ALWAYS select Individuals for volunteers.
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Adding a New Volunteer, *continued*

Step	Action	
3 (cont)	Entity Sub-Type	After selecting the Entity Type, an Entity Sub-Type option may appear (this varies by SMP). If so, discuss with your SMP director to select the appropriate sub-type.
	Phone Number	Tab past this initial Phone Number field. Data entered in this field does NOT show in forms or reports (see step 4).
4	Complete the optional information as desired for your SMP.	
	Section	Explanation
	Contact Information	Enter the volunteer’s street address and zip code and/or e-mail address in this section.
	Phone Information	Enter the volunteer’s phone number(s) here by selecting the ‘Number type’ (i.e. home phone), then entering the number. Number type and phone are required fields. Add additional numbers by clicking Add Number to Pending List .
	Notes	Enter notes as desired for your SMP.
	Custom Entity Attributes	Scroll down to access this section, and enter information as desired for your SMP. <ul style="list-style-type: none"> • Organizational Affiliation (i.e. any Partner / Subcontractor the volunteer is affiliated with) • Volunteer Start Date • Training Completed (if any) / Passed SMP Foundations Assessment (if applicable) <ul style="list-style-type: none"> ○ Note: For more information, see the handout <i>Instructions for Issuing Certificates and SMART FACTS Tracking</i> on the SMP Foundations Training web page. • Volunteer Capabilities • Volunteer demographic information
5	When you are ready to save the volunteer’s information, take the following steps:	
	Step	Action
	1	Scroll to the bottom and click Add Entity to the System .
	2	Click Yes to the message about adding the entity to your Volunteer Tracking and Management program.
	3	Click No to the message asking if you want to View/Edit your new Entity.
4	Click OK to the message indicating that (volunteer name) was successfully added. <ul style="list-style-type: none"> • Note: The volunteer is not completely added to the system until you receive and confirm this message! 	

Viewing and/or Editing a Volunteer

To view or edit a volunteer in SMART FACTS, take the following steps:

Step	Action
1	Select Volunteer Tracking & Mgmt program (if not selected).
2	On the right side navigation bar, select Volunteers/Partners , then click the sub-topic View/Edit Volunteer/Partner .
3	Enter the last name in the space provided, or leave the field blank to see all "entities." Click on Search .
4	Click on the volunteer's name in the Entity Name column.
5	<p>Make changes to the volunteer data as needed.</p> <ul style="list-style-type: none"> • To edit the sub-type, click the heading Entity Sub-Types. In the pop-up box, scroll down to individuals. Make changes and scroll down to Save. • If there are not any Entity Sub-Types, speak with your SMP director and see the SMART FACTS Manual for the section in chapter 5 on Defining Entity Sub-Types. • Tip: The phone number cannot be edited directly. To change the number, you must delete the old one and add a new one. <ul style="list-style-type: none"> ○ Click the red X after the phone number to delete it. ○ Use the Phone button to add a new phone number. • Use the Edit button to change other contact information. • Update Custom Entity Attributes as desired (i.e. as volunteers complete training and/or pass the assessment). • Enter Notes as desired.
6	<p>To save your changes, scroll down and click Update. When the successfully updated message appears, click OK.</p> <ul style="list-style-type: none"> • Tip: See SMART FACTS Manual, chapter 5 for descriptions of links above the Update button (i.e. Entity Face Sheet).

Recording Volunteer Hours / Training: Three Options for Data Entry

SMART FACTS provides three options for recording volunteer hours worked or spent in training, depending on the number of volunteers and whether or not each volunteer contributed mileage or other in-kind support. **Use only ONE of these three options for each situation.**

- 1) **Record Hours / Mileage / In Kind:** Use this option to track volunteers who have contributed mileage or other in-kind support in addition to hours. Data must be entered individually for each volunteer.
- 2) **Track Volunteer Hours:** Use this option to track an individual volunteer, if the volunteer has only contributed their time.
- 3) **Record Batch Volunteer Hours/Training:** Use this option to record hours for multiple volunteers who all performed **the same type of work on the same day**. This option does NOT allow you to track mileage or in-kind.

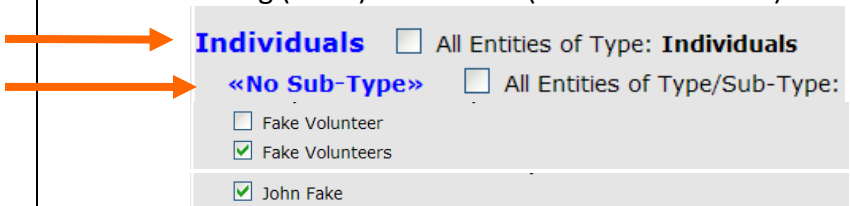
Recording / Tracking Volunteer Hours / Training (Individually)

To track volunteer activity on an individual basis (using either option 1 or option 2 outlined above), take the following steps:

Step	Action				
1	Select Volunteer Tracking & Mgmt program (if not selected).				
2	On the right side navigation bar, select Volunteers/Partners , then click the sub-topic Record Volunteer Hours/Training .				
3	Enter the last name in the space provided, or leave the field blank to see all “entities.” Click on Search . <ul style="list-style-type: none"> • Tip: If the volunteer’s name does not appear, follow the previous instructions for Adding a New Volunteer/Partner. 				
4	Click on the volunteer’s name in the Entity Name column.				
5	Under the volunteer’s name, select the appropriate option from the drop-down menu, and click Submit . <ul style="list-style-type: none"> • Record Hours/Mileage/In Kind (composite): To enter hours and mileage/in-kind support (or just hours) • Track Volunteer Hours: To enter hours only 				
6	In the Contact Location Method field, select the appropriate Volunteer Activity from the drop down list. Note: SMART FACTS automatically calculates dollar values based on the selection made here. See the SMART FACTS Operations Manual for details.				
7	Enter the date of contact. Remember that although it is not yellow, this field is required for the OIG report. Reminder: Do NOT enter a Date of Next Contact.				
8	In the Track Volunteer Hours field, enter the time in HOURS . Include all time that the volunteer contributed specific to this activity.				
8a	If Record Hours/Mileage/In Kind was selected in step 5, also enter the following information. <table border="1" style="width: 100%; margin-top: 10px;"> <tbody> <tr> <td style="width: 30%;">Non-reimbursed mileage</td> <td>Enter any mileage that the volunteer has donated and will not be reimbursed for. If none, enter 0.</td> </tr> <tr> <td>Other in-kind contributions</td> <td>Enter the dollar amount of any in-kind contributions provided by the volunteer. If none, enter 0.</td> </tr> </tbody> </table>	Non-reimbursed mileage	Enter any mileage that the volunteer has donated and will not be reimbursed for. If none, enter 0.	Other in-kind contributions	Enter the dollar amount of any in-kind contributions provided by the volunteer. If none, enter 0.
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Other in-kind contributions	Enter the dollar amount of any in-kind contributions provided by the volunteer. If none, enter 0.				
9	Enter notes as desired, i.e. if in-kind contributions entered.				
10	After completing all data entry for the specific volunteer activity, choose the appropriate Save option. <ul style="list-style-type: none"> • Save Effort & Close: Saves and closes this entry. • See the SMART FACTS Manual, Volunteer Tracking and Management chapter for additional Save options. 				

Recording Volunteer Hours / Training (as a Batch)

To record hours worked by multiple volunteers who all performed the same type of work on the same day, take the following steps:

Step	Action
1	Select Volunteer Tracking & Mgmt program (if not selected).
2	On the right side menu, select Volunteers/Partners , then click the sub-topic Record Batch Volunteer Hours/Training .
3	<p>Click the heading (word) Individuals (NOT the checkbox).</p>  <ul style="list-style-type: none"> • If your SMP does not use Entity Sub-Types, the sub-heading (words) No Sub-Type will appear under the Individuals heading. Click this sub-heading and a list of all volunteer names for your SMP will appear. • If your SMP does use Entity Sub-Types, all sub-types used by your SMP will appear. Click each sub-heading to view a list of volunteers within each sub-type. • For more information on Entity Sub-Types, see p. 1 of this job aid: Adding a Volunteer, step 3.
4	Place a checkmark next to any volunteer whose activity you would like to include in the batch, then click Submit.
5	In the Contact Location/Method field, select the appropriate Volunteer Activity from the drop down list. Note: SMART FACTS automatically calculates dollar values based on this field. See the SMART FACTS Operations Manual, Volunteer Tracking and Management chapter.
6	Enter the date of contact. Remember that although it is not yellow, this field is required for the OIG report.
7	In the Volunteer Hours section, enter the time in HOURS next to each volunteer’s name to indicate the amount of time they spent working on this activity. Tip: If any volunteers appear on this list who did not participate in this activity on this day, enter their hours as 0.
8	Enter notes as desired.
9	After completing all batch data entry for the volunteers listed, click Record Effort . A pop-up message confirming your entry will appear – click OK .

Removing (a.k.a. Dismissing) a Volunteer

In SMART FACTS, the term **dismiss** (instead of delete) is used when a volunteer is no longer working with the SMP. Dismissing a volunteer will remove your ability to enter new hours for them or even see their name within the system. **Do not dismiss a volunteer unless you are sure that the volunteer does not ever plan to return to SMP work.** For instructions on dismissing volunteers, see the SMART FACTS Manual.

Accessing the Volunteer Forms

Several volunteer forms are available in SMART FACTS. For more information about these forms, see the SMART FACTS Operations Manual and/or the *Handout: Instructions for Issuing Certificates and SMART FACTS Tracking* (see Resources section below).

To access the volunteer forms in SMART FACTS, take the following steps:

Step	Action
1	Select Reports from the right side navigation bar.
2	Select the Letters, Forms & Reports sub-topic.
3	Scroll down until you see the Volunteer Forms and Reports list.
4	Click on the name of the form you wish to view and/or print.
5	When asked Do you want to open or save this file? <ul style="list-style-type: none"> • Select Open to see and print the form from SMART FACTS. • Select Save to save the form to your computer.
6	To print, click on File in the upper left corner, then select Print .

SMP Resources: Volunteer Tracking and Management

Resource	Purpose	Access Instructions
SMART FACTS Operations Manual	Volunteer Tracking & Management Program in SMART FACTS	www.smpresource.org > Resources for SMPs > SF, or SF home page: http://smartfacts.etosoftware.com , or contact The Center
SMP Resource Center Website	SMP online resources	www.smpresource.org
Handout: Instructions for Issuing Certificates and SMART FACTS Tracking	Information about tracking volunteer training in SF and issuing certificates	www.smpresource.org > Resources for SMPs > SMP Foundations Training: Certificates of Completion section
The SMP Resource Center (The Center)	Policy guidance and questions about SF data entry and the SF Manual	E-mail: hflory@smpresource.org or gpaulson@smpresource.org Call: 1-877-808-2468