

## GOAL FOR THIS DOCUMENT

The goal is to give you a sense of all the things we can assign, track and manage for the people in the system. It is important to understand the inter-relationship of how people are represented in the system and the service offerings managed by it. It would be most helpful for you to access YOUR record in the system while you review this information.

## DESCRIPTION OF THE INFORMATION IN THE "PEOPLE" RECORD

We will define who can add persons, and also who can update, archive or delete persons. (Archiving inactive persons is preferred to deleting them, since they likely have a history of activity.)

*Note that when initially entering a person, a short panel asks only for Name, Phone and Email. Click "Save" on that and then the full panel opens. If the person has no email service, enter "none@gmail.com"*

While you may not actually be entering or even updating persons, it is important to know what data is in the system since almost everything in the system interacts with the "PEOPLE" database.

We have initially loaded the database with our 300+ volunteers. But recall that using SchedulesPlus, everyone who interacts with Kare Bears will be in the file – volunteers as well as those using our services; and perhaps outside persons such as service providers.

The system requires the following fields: First Name, Last Name, Address (City State ZIP), one phone number and one email address. Use their PebbleCreek address. There can be two additional addresses – a separate Billing Address (but we are not "billing" since we do not charge for anything) – and perhaps a "snowbird" home address. Capturing that may have some value – to be determined.

Use the address entry box "Lookup using Google" rather than typing it in directly. That lookup process will place the normalized address in the fields.

Google will typically begin making suggestions with the first part of what you key. Be careful that many PebbleCreek streets have instances of Avenue, Drive, Lane, Court, etc. *(Dale and Glen can also occur on the west side, but not in PebbleCreek. On the east side the sequence of names is: Street, Place, Way, Terrace, Run)*

There can be up to three phone numbers. It is important that you also select the phone number type for each entry (Home, Cell, Work). The system can send TEXT messages, but it only uses a number identified as "Cell". The system allows extensive use of email to participants. If two email addresses are entered, messages will go to both.

SchedulesPlus is designed for Senior Centers, so you will see places for many data elements which we will not be using – Marital Status, Gender, Ethnicity etc. It is also possible to indicate the person's emergency contacts, and/or household members – but these are not suggested for entry now.

We have added two "custom" PebbleCreek fields not in the base system: Unit and Lot. They appear at the bottom of the data panel. *Note that there is a dropdown list of the valid Unit numbers in that entry field selection.* We have historically captured Unit and Lot and should continue to do so, unless we ultimately decide to stop caring about that in the future.

There are a couple of other important elements to enter when appropriate:

Accommodations – you can select (one or more) from a list of special conditions – wheelchair, deaf, etc. These indications do then show in RIDES information. The person requests, they can Decline email and/or text messages. But of course that would preclude many aspects of our communication with them.

Ignore the four date fields (birth, etc.) and the Insurance fields here. That information is kept separately in additional records pertinent only to drivers. Ignore Waiver and Member Codes.

Lastly there is a free form NOTES field to make any special comments for the person. We need to further decide what we wish to place here. We have some other fields in Zoho not represented in SchedulesPlus (e.g. Dates Away). Note that any of them from Zoho have been concatenated into this NOTES field.

GROUPS: Any person in the system can be assigned into one or more Groups. We currently have these groups defined: Board, Office Volunteer, Driver, Coordinator, Implementation Team, BetaTest, and Volunteer (yes, it is misspelled but those codes can only be eight characters long.) You can see a person's assigned group(s) at the bottom of their data panel.

Note that when in EDIT mode, the normal panel is labelled as sub-tab "Base changes" and there is a second sub-tab labelled "Group changes". Go there to check on (or off) the groups for this person.

IMPORTANT NOTE: The last GROUP listed (VOLUNTER) must be checked if indeed the person is a volunteer in any capacity. Why? Recall that everyone who uses any service will be in the system, so we need a way (Group) to be able to message only to volunteers.

In addition to all this information about each person, there is an additional separate file kept in the RIDES module, with extra information pertinent only to drivers. *You will only see this if you are authorized to the RIDES module.* What is indicated here? Birth date, license expiration date, insurance \$ limits, insurance expiration date, what days and what hours are they available to drive, their unavailable dates – and even a few more.

## EMAILING

You will see (once authorized) numerous opportunities for email messages to be sent – to individuals - or to persons included in the currently selected GROUP or INTEREST listings.

There will be a further Implementation Notes document with more detail. But in short, you would be presented with a dialogue panel to create an email. It will list the addressees based on how you initiated the request. The "Reply to" for the message will be the person (ADMIN) who created the message (your email address from your PEOPLE record).

Remember that ALL emails generated from the system have [karebears@schedulesplus.com](mailto:karebears@schedulesplus.com) as the sender.

As usual, enter a Subject Line and message body.

There is one significant limitation! The system will NOT allow you to cut-and-paste into the message body. It was explained that since such text can be prepared on various and numerous external applications, there can be embedded control or formatting characters which could cause issues with their email process.

Yes, this is a bit of a big issue. A suggested work-around for lengthy messages would be to attach a document with the longer text, and keep explanatory information short enough to just type in.

## LEARNING ABOUT PERSONS INTERESTED IN VOLUNTEERING

For the foreseeable future, we should continue to expect that persons newly expressing interest in volunteering will fill out the Interest form on the website. Or, if they contact Kare Bears verbally, we should continue to ask the person to fill out that form to begin the process. This of course will change if we open up the Home Use feature to the "public".

The form is then sent to Susan Fallon for entry into Zoho (which will become unnecessary shortly); and also to Jo Werner, who contacts the person to share further volunteering information, and jointly plan next steps – typically follow-up with appropriate KB staff. At present the form also goes to Mark for entry into SchedulesPlus - if their discussion with Jo indicates that they intend to pursue volunteering. It would seem logical that the future process would have Jo make entry into SchedulesPlus.

## INTERESTS

This final discussion is about the person's interests – both interests in volunteering and interest in activities. In Zoho we categorized volunteers in those areas which are now GROUPS in SchedulesPlus, but also as: Bakers, Event Planners, Greeters, Phone Callers, Computer help and Health & Wellness assistants. Since their activities are infrequent, we did not make them GROUPS to start. Instead, we have established them as INTEREST topics in the system. As part of the data import those interests were captured into SchedulesPlus for each person as appropriate.

We have also added "Interest" categories for Office Volunteer, Driver and Coordinator, to match the selections available on the on-line Interest Form. *Yes, those exist as Groups – but which contain ACTIVE volunteers in those roles.* In Zoho we had a "Pending" concept for people "in-training" for those three roles. A suggestion going forward would be that volunteers who expressed INTEREST in any such role would be managed "for training" by the appropriate GROUP LEADER while in that interest category - then

added to the associated GROUP once trained and available for service. Their "interest" indication would then be removed. For discussion.

From the main PEOPLE display panel, there is a sub-tab "Interests" where the list of matching people is displayed, and can be sent email. When you display a given person in the file, there also is a similar sub-tab "Interests" which shows the list of topics available to assign to the person, or already assigned.

The same concept of categories of interest can be established for capturing and tracking people's interest in topics for activities. This needs to be planned and setup going forward if we find it useful.