VERIFIED VOLUNTEERS

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Setting up Verified Volunteer Integration with HandsOn Connect

Configure Verified Volunteers in the Control Panel

Set up Verified Volunteer (background check) types in control panel

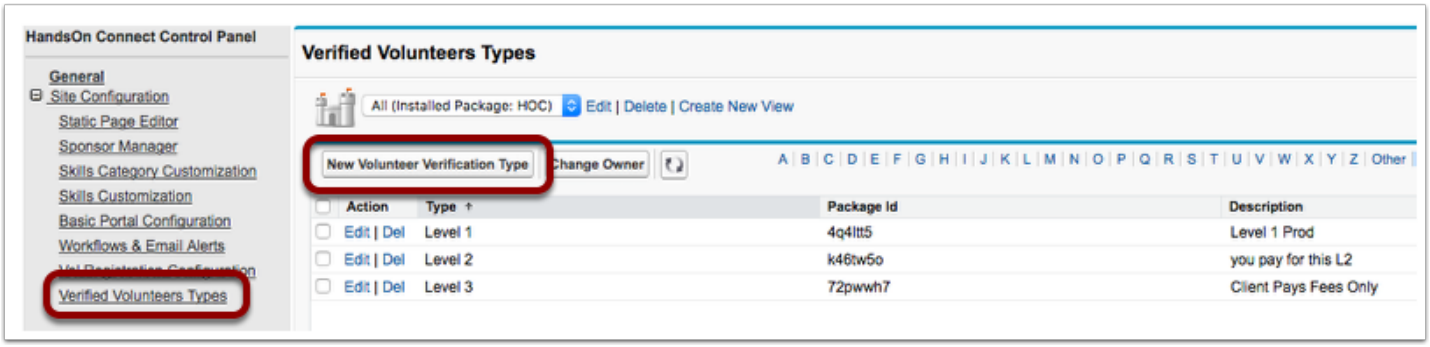
To get started using Verified Volunteers in HandsOn Connect, you'll need to enter the Volunteer Verification types you've arranged with Verified Volunteers for your account.

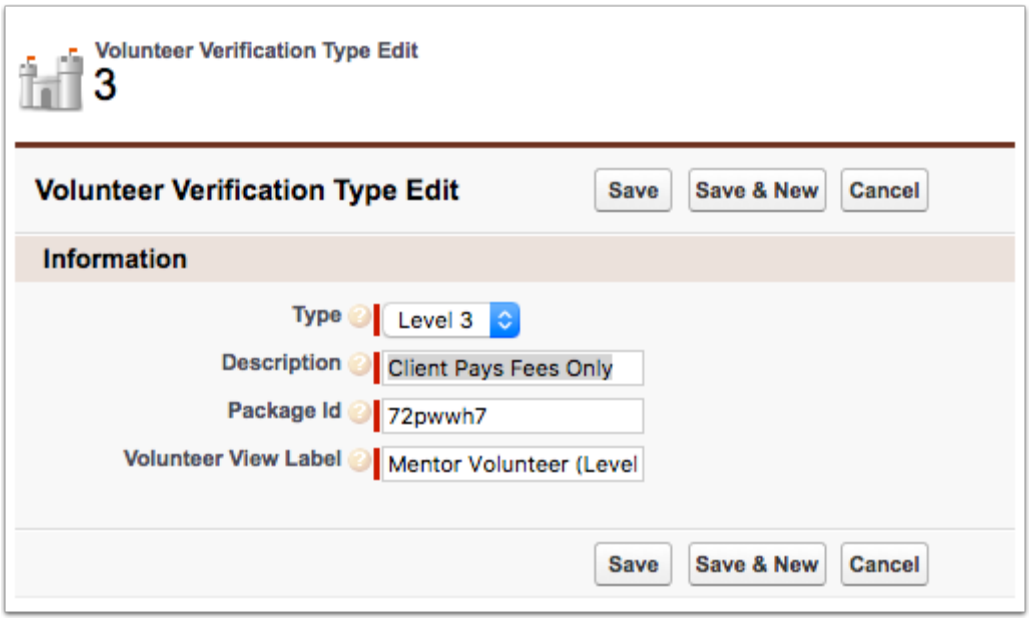
Based on your contract with Verified Volunteers, you may have one or more types of background checks. Each will have its own Package ID and a Level associated with it.

You'll enter all your background check types in the control panel / Verified Volunteer Types. (This is a one-time set-up unless you add new background check types in the future)

Go to Control Panel / Verified Volunteer Types

Initially there will be no types listed, here.. Click "New Volunteer Verification Type" to create your first (and any additional) Verified Volunteer Types.





There are four fields to configure for each verification type you have arranged with Verified Volunteers.

- **Type**: Level Type (level 1, 2 or 3)
- **Description**: Internal use description (so you can differentiate which package IDs and background check types are requested with that ID)
- **Package ID**: The Id given to you by Verified Volunteers that identifies the background check package
- **Volunteer View Label**: What the volunteer sees in "My Account" under the Background Check menu item. (See below)

Click Save to save each Volunteer Verification type.

Note: The order you create these in, will be the order the options appear in to the volunteer. (It's not possible to reorder these later)

Once you have your volunteer Verification types setup you'll be able to start requiring background checks for specific volunteer opportunities.

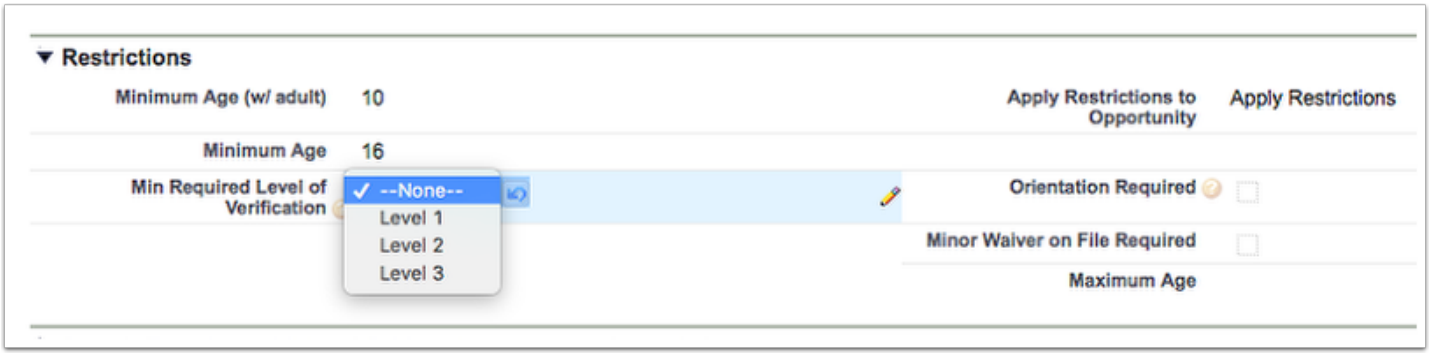
Using Verified Volunteers as an Opportunity Coordinator

Requiring a background check for a volunteer opportunity

To make a volunteer opportunity require a background check of a certain level in order to sign up, go to the volunteer opportunity record and scroll to the restrictions section.

There you'll see a new field labeled "Min Required Level of Verification.

Set the Min Required level of Verification to Level 1, Level 2, or Level 3.



Save the Volunteer Opportunity Record.

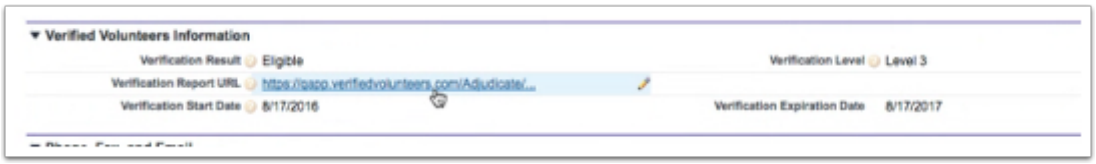
Now, only volunteers who have the required level of background check will be able to sign up for the opportunity. If they do not have the required level of background check, they will receive a message directing them on how to apply for the background check.

[See this article for how the volunteer experiences Verified Volunteeers on the public site.]

Checking Verification Status of Volunteers

If an administrator wishes to check on the verification status of a volunteer, they can go the volunteer's contact record.

A new section will appear on the contact record labeled "Verified Volunteers Information"



In this section the following fields are present:

Verification Result - shows the level of the check completed. This is automatically populated by Verified Volunteers and should not be edited by administrators. The following picklist values are used:

- I**n Progress**
- **Considered** - background check has been completed, but something has turned up on it. It is advisable that the administrator logs into Verified Volunteers and decides whether to mark that volunteer as eligible or ineligible based on the findings.
- **Cleared** - background check has come back with no problems.
- **Eligible** - A considered or cleared level has been reviewed on the Verified Volunteer site by the administrator, and adjudicated as eligible.
- **Ineligible** - A considered or cleared level has been reviewed on the Verified Volunteer site by the administrator, and adjudicated as ineligible. (Ineligible volunteeers will not be able to sign up for background check required opportunities in the future.

Verification Report URL: - a link that takes you to this contact's verification report on Verified Volunteer's website. Click on this to review and adjudicate 'considered' background checks. If you are not already logged into the Verified Volunteer system you will be prompted to login.

Verification Start Date: the date the verification was requested

Verification Level: populated by Verified Volunteer showing the results. Shows Level 1, Level 2, or Level 3

Verification Expiration Date: is the day that background check is no longer considered valid. When the expiration date has passed - the background check level and result will be cleared from the contact record. (Note: Volunteers will be alerted via email when their check is due to expire and advised to run a new background check.)

How does the "verification result" value affect opportunity

sign-up?

If a contact's verification result is Considered, Cleared or Eligible, HOC will allow the volunteer to sign up for an opportunity requiring that level (or less) of a completed background check.

Note that a 'considered' verification result makes it possible for the volunteer to sign up for opportunities for up to 30 days if not reviewed. They are not blocked from doing so until you adjudicate the check and mark them as ineligible.

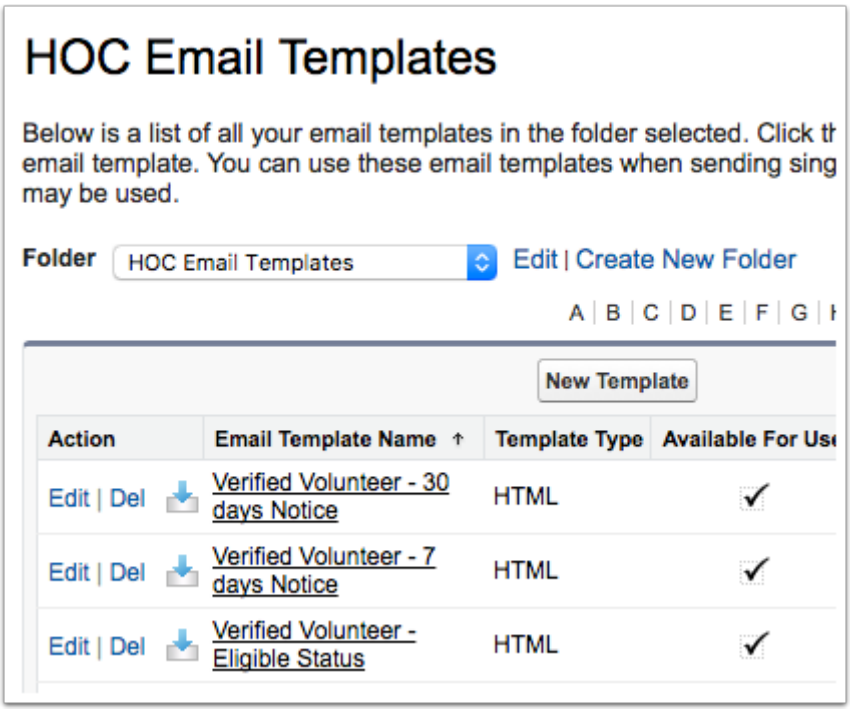
We recommend that if you set someone's background check to ineligible, you look at any confirmed connections they may have for Verified Volunteer required opportunities, and decide if you wish to decline them as volunteers.

Volunteers receive email notifications when their check is coming up for expiration, and when they've been marked as eligible.

There are three email notifications sent from HandsOn Connect via workflow.

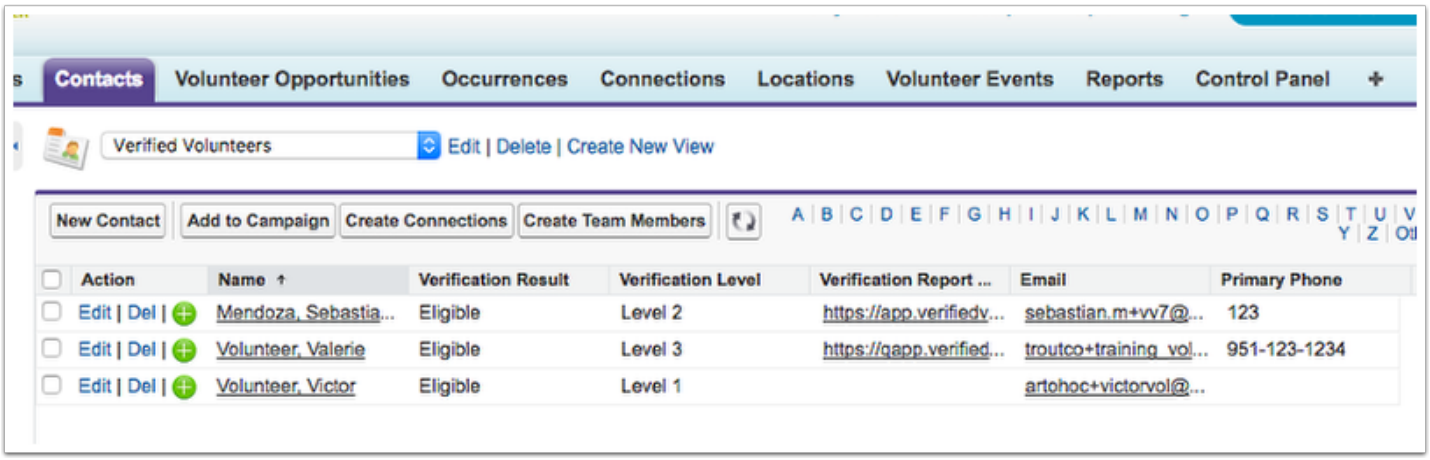
You can customize the messaging in these three email templates by going to setup / email templates

- **Verified Volunteer - 7 days notice** -- Notifies volunteer that their background check expires in 7 days and has a link to your site to initiate the background check process again.
- **Verified Volunteer - 30 days Notice** - Notifies volunteer that their background check expires in 30 days and has a link to your site to initiate the background check process again.
- **Verified Volunteer - Eligible Status** -- notifies the volunteer their background check is completed and they have been made eligible and they can now sign up for VV opportunities. They are not notified automatically until you have adjudicated their cleared or considered result, and marked them as eligible.



On the admin site, there is also a convenient view of all verified volunteers in your database

Go to the contacts tab and click on the view "Verified Volunteers)



How volunteers experience Verified Volunteers

How a volunteer sees an opportunity that requires a background check

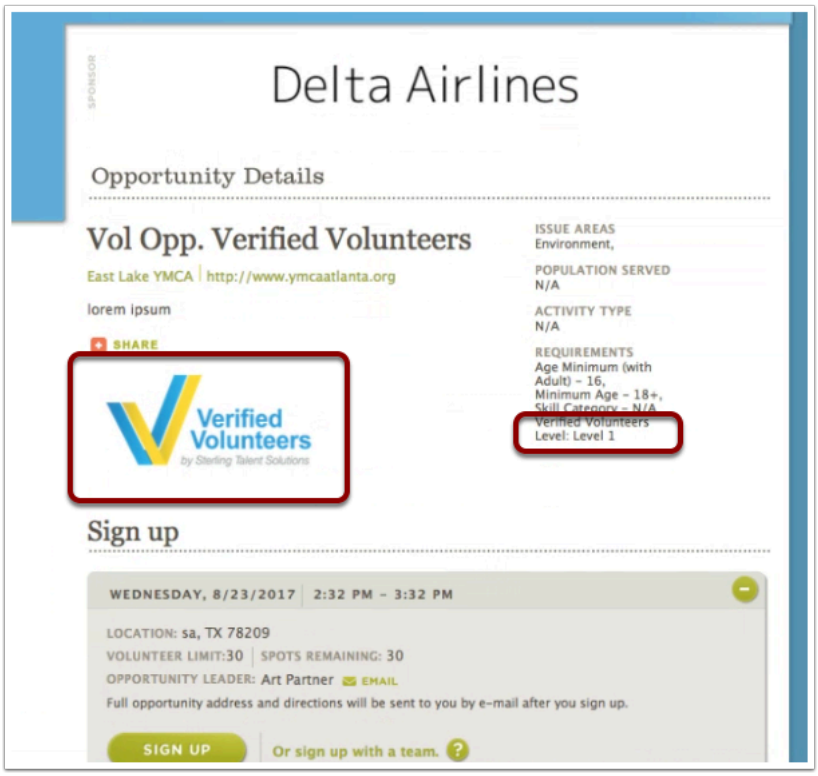
Before signing up for a volunteer opportunity, a volunteer must be registered on the site. This will provide some of the basic information needed for the verification process.

On your volunteer registration page be sure to require at least these fields (they are needed in order to background check volunteers:

- Name
- Date of Birth
- at least one full address
- at least one Phone Number
- Email address

Opportunity detail page of an opportunity requiring a background check.

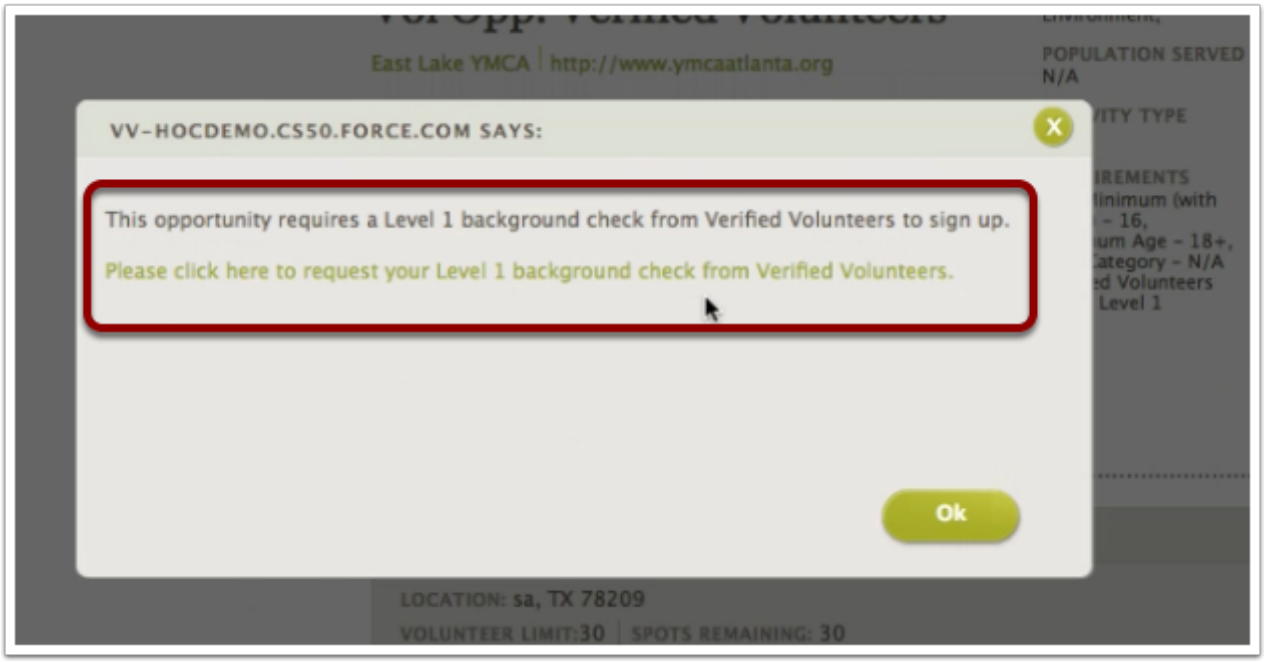
If you've marked an opportunity as requiring a level 1, 2, or 3 background check, the Verified Volunteers logo appears on the opportunity detail page, and the level of background check required is shown on the right sidebar.

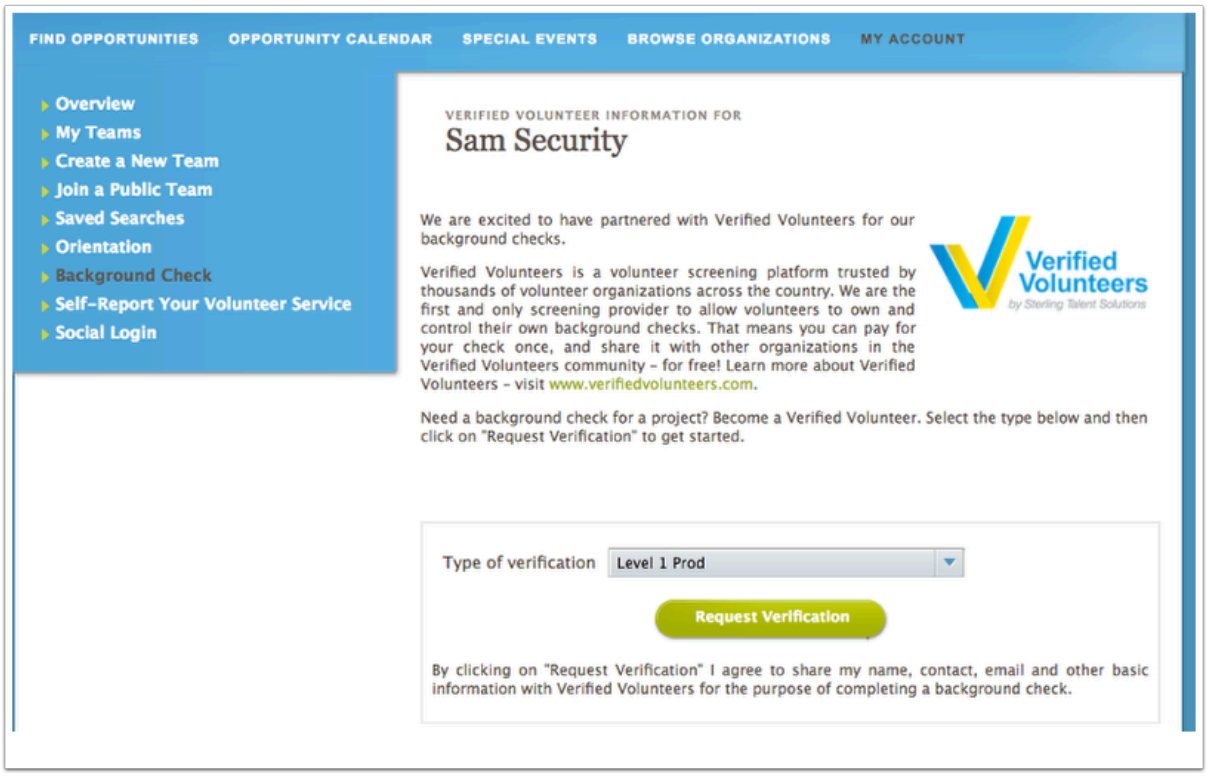


When a volunteer signs up for this opportunity:

If the volunteer already has a background check for the required level (or higher), the sign-up goes on as usual.

If the volunteer does not have a background check for the required level or higher, they are prompted with a message telling them a background check is required, which provides a link which takes them to the background check page in the My Account section of the website:

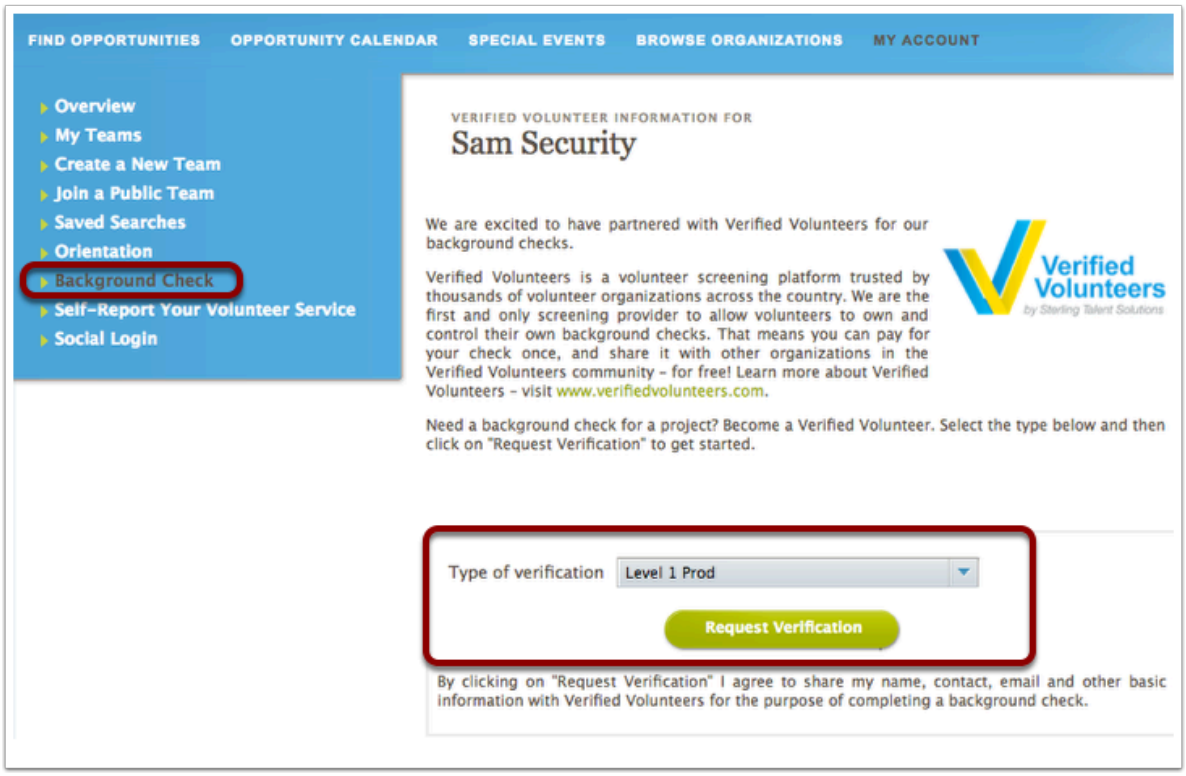




When the volunteer clicks on the link they are taken to the page My Account / Background check. This is the page where they will request a background check and manage it in the future.

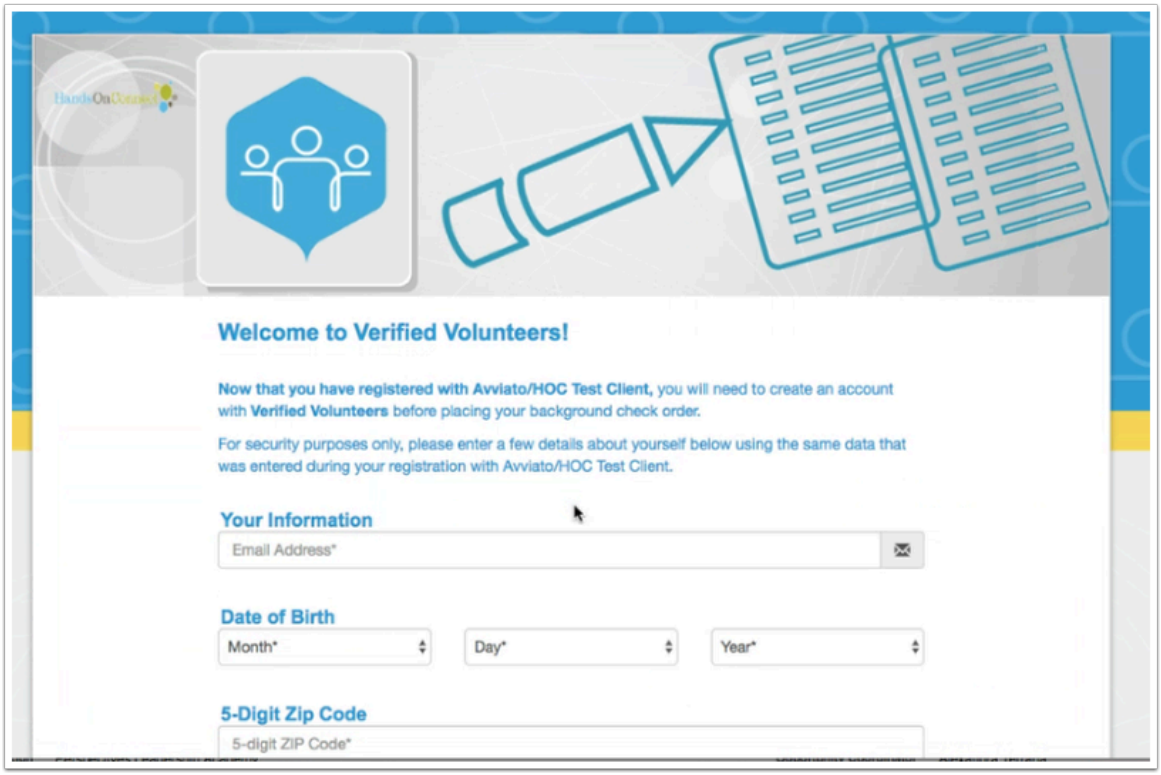
To initiate a background check they select the level of verification they wish to apply for. (The picklist values here are the ones you configured in the control panel in the field "Volunteer View Label")

They then click the Request Verification button which will take them to the Verified Volunteer site, transferring information from their HandsOn Connect registration for them for validation.



Note: If you have different verifications configured for different categories of volunteers (by state, or by volunteer type), be sure to label the "Volunteer view labels" in the control panel so that's it clear to the volunteer which verification they need. Always include the Level # in the title (since they know they have to apply for a certain level of clearance based on the volunteer opportunity they wanted to sign up for).

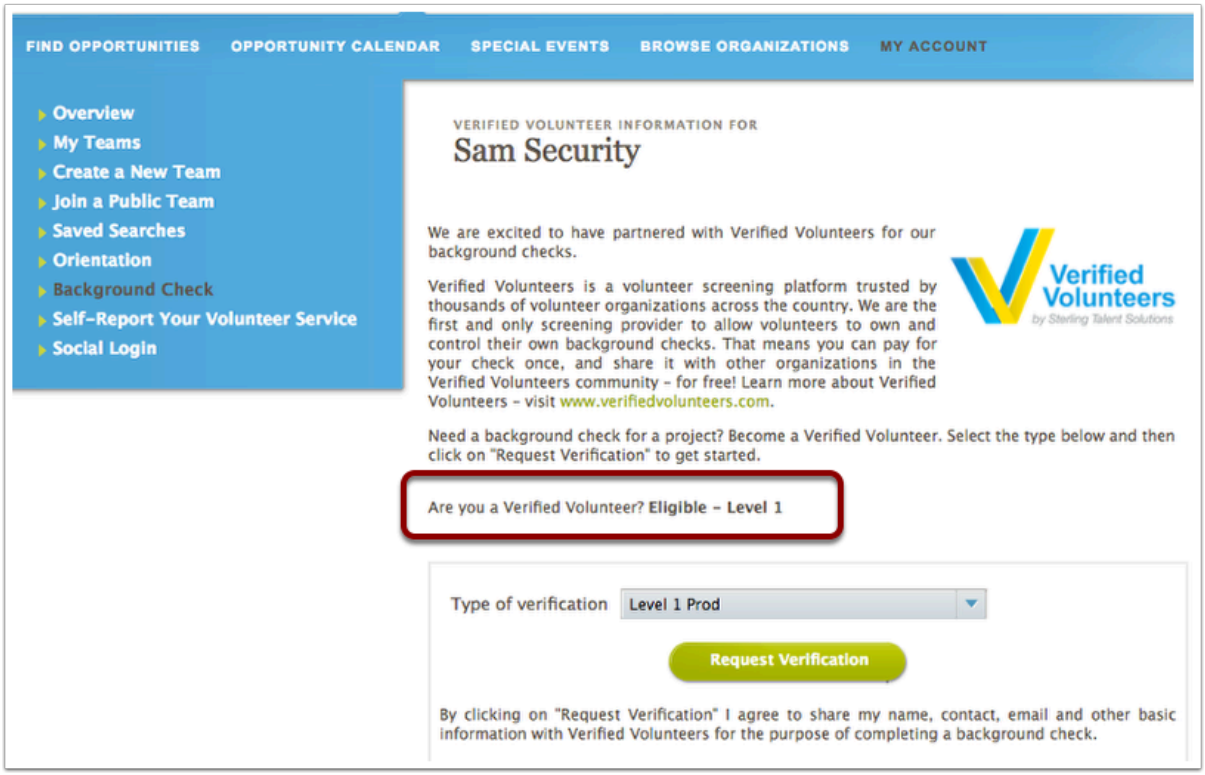
The volunteer will then be taken to the verified volunteer site



Click Continue and Verified Volunteers will walk them through the process of initiating their background check.

When the background check has been completed, the administrators will be notified by Verified Volunteers, and can adjudicate the background check. When they mark the volunteer as eligible, HandsOn Connect will send an automated email letting them know they can search and sign up for projects requiring a completed background check.

A volunteer can see the current status and level of his verification in my account / Background Check



From here the volunteer can renew after being notified that his clearance will expire (a clear or eligible background check lasts for one year), and/or apply for a higher level of clearance.

How Partners can use Verified Volunteers

Using Verified Volunteers in the Partner Portal

If you wish to make it possible for partner organizations to require Verified Volunteer background checks for their volunteer opportunities, please open a zendesk ticket and request that VV be enabled in your version of the partner portal.

A partner has limits in how Verified Volunteers works for them. Here's what you need to know:

Partners can restrict signup for their opportunities to volunteers with a certain level of verification

The field "Min Required Level of Verification" can be set to appear in the restrictions section of a volunteer opportunity record (HOC 2.x) or as an option in the Create Volunteer Opportunity process (HOC 3.x)

Doing so will restrict volunteer signing up unless they've initiated the appropriate level of background check.

Partners do not have access to the verified volunteers section of the contact record.

Due to Verified Volunteer privacy requirements - a partner does not automatically have access to view the status of a volunteer's background check. Here's what they should do:

1. Only volunteers who have a status of 'cleared', 'eligible' or 'considered' will be able to create a connection for their opportunity.
2. So - for every volunteer who DOES have a connection to the opportunity they should email that volunteer and request that the volunteer grants them access to their background check.

3. A volunteer makes that request at Verified Volunteer to share their background check with the partner and a copy of the background check will be made available to the partner through the Verified Volunteers system.

A partner MUST request access to the background check report.

Since volunteers CAN sign up even if they have a 'considered' status - partners can't assume that a connected volunteer is truly eligible in their eyes. Even if you have reviewed and marked them as eligible, the found incident may not be tolerable to the partner themselves and they need to make that determination for themselves.

Only the affiliate can update the contact's record with a status of Eligible or Ineligible, so the partner may have to reject a volunteer based on their own criteria for borderline cases. For this reason, partners must request a copy of the background check so they can make this decision themselves and not solely rely on the fact that the volunteer has been screened.