

# CERVIS Step-by-Step

## Leadership Team Level Volunteer Menu

### Main Dashboard



System Announcement: CERVIS 6.0 is here! [CLICK HERE](#) to learn more.

[Dismiss](#)



#### Volunteer Management

- [Add New Volunteer](#)
- [Search / Manage Volunteer Database](#)
- [View / Manage Volunteer Follow-up](#)
- [Report Management](#)



#### Event/Project Management

- [Add New Event](#)
- [Search / Manage Existing Events](#)
- [Review Open Service Project Applications](#)
- [Reservation Management](#)
- [Event / Project Sign-in Console](#)



#### Attribute Management

- [Interest Category Inventory Management](#)
- [Skill Inventory Management](#)
- [Equipment Inventory Management](#)
- [Availability Inventory Management](#)
- [Group Management](#)























#### System Management

- [Change Password](#)
- [File Management](#)
- [CERVIS Customer Support Tool](#)
- [View System Log](#)
- [CERVIS User Manual](#)



## To View Registered Volunteer List For A Site

- Click “Search/Manage Existing Opportunities”
- Click on the site name

Opportunity Search Result Listing				
<input type="checkbox"/>	Date & Time	Opportunity / Category	Registration	Status
1. <input type="checkbox"/>	Jan 24 - Jun 3, 2022   	<b>Fisher Magnet Upper Academy (FREC 2) Tax Preparer- 2022</b>   Tax Preparer / Fisher Magnet Upper Academy	0 / 582	Open
2. <input type="checkbox"/>	Jan 24 - Jun 3, 2022   	<b>Northwest FH Tax Preparer- 2022</b>   Tax Preparer / Northwest Financial Hub	0 / 580	Open
3. <input type="checkbox"/>	Jan 24 - Jun 3, 2022   	<b>Oakland NTC Tax Preparer- 2022</b>   Tax Preparer / Oakland Financial Hub	21 / 580	Open
4. <input type="checkbox"/>	Jan 24 - Jun 3, 2022   	<b>Southwest NTC Tax Preparer- 2022</b>   Tax Preparer / Southwest Financial Hub	2 / 580	Open



- Click “View Registered Volunteers/Groups”

### Opportunity Management: Oakland NTC Tax Preparer-

 No Tags Assigned 

-  [Update Opportunity Information](#)
-  [Manage Time Slots](#)
-  [Manage Custom Registration Questions](#)
-  [View / Update Opportunity Photo](#)

-  [Register Volunteers/Groups](#)
-  [View Registered Volunteers/Groups](#)

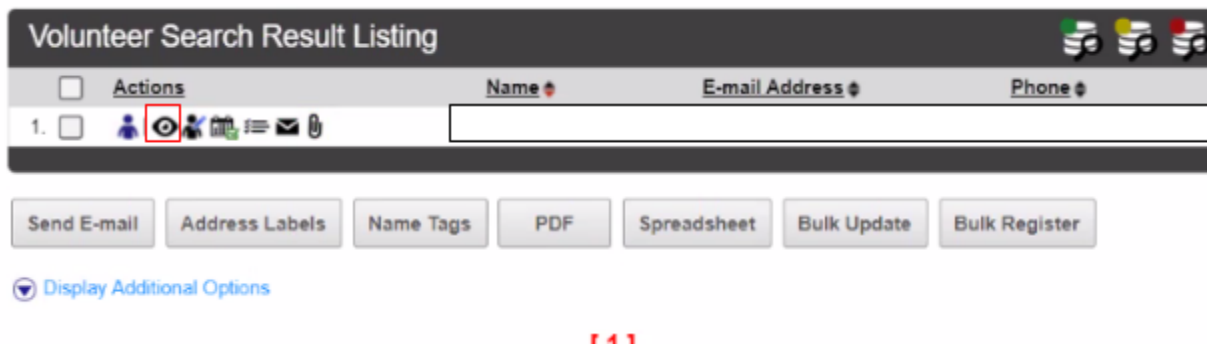
-  [Send E-mail to Registered Volunteers](#)
-  [Send Private Registration Code Invitation E-mail](#)

## Sign-In Sheet

- Print a [Volunteer Sign-In Sheet](#)

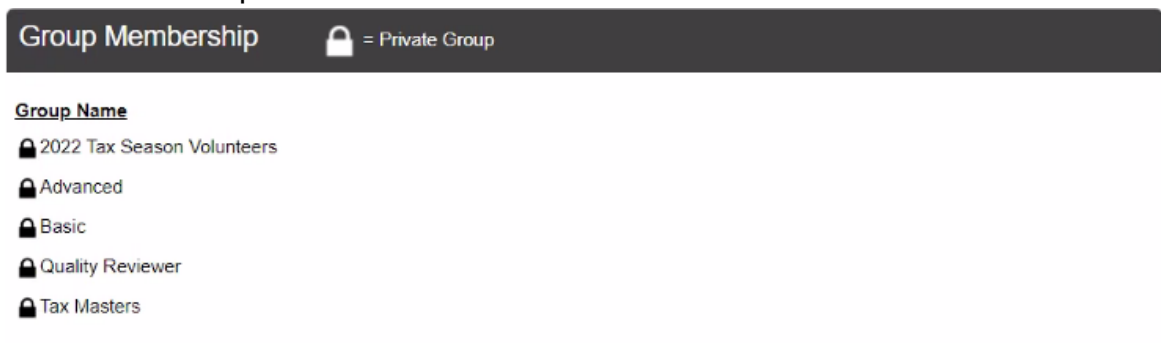
## To Search For A Volunteer

- Under Volunteer Management, Select “Search/Manage Volunteer Database”
- Type in First or Last Name In the Search Bar
- The volunteer’s name, email and primary phone number will be listed on the search results page.




## View Volunteer Certifications





- Click on the “View Volunteer Details” (eye Icon) on the Volunteer Management Dashboard
- Scroll down to the Current Group Membership section (It will be listed towards the bottom.) Scroll down to Checklist Item Status to make sure all their documents are up to date.



Availability

**Current Group Membership**  = Private Group

Group Name


-  Basic
-  Call Center
-  Staff
-  Tax Masters

**System Volunteer Profile Matches**

<u>Volunteer Name</u>	<u>E-mail</u>	<u>Primary Phone</u>	<u>Alternate Phone</u>
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10192577 Thu, Jan 29, 2016 11:50 AM to 300 P.M. = Registered: 1/24

## To Add A Walk-In Volunteer

- Follow the steps to search for a volunteer.
- Click the Manage Volunteer Icon 
- Click “Register Volunteer For An opportunity”
- Select the correct event from the drop down menu
- Click Register Volunteer

## Logging Volunteer Hours

- Volunteer hours are automatically associated with the volunteer shift in CERVIS, but volunteers should still be signing in on their mobile device or through your designated station at your site (if applicable) at the start of their shift, and sign out at the end for the most accurate log. If any edits need to be made to volunteer hours (including no-shows), please email Kelly Lepper at [volunteer@accountingaidsociety.org](mailto:volunteer@accountingaidsociety.org).