Using Online Applications in Better Impact for Extension Master Gardeners

Adapted from "Using Online Applications on Better Impact for the Virginia Master Naturalist Program."
Many thanks to the VMN program for sharing their resources!

Better Impact Training: Online Applications
https://video.vt.edu/media/VMN+Better+Impact+TrainingA+Online+Applications/1_pprtdwyw
There are a few differences in the applications between the EMG and VMN programs, but the information presented here is still very relevant and should be useful to EMGs.

General Notes and Procedures

- The Extension Master Gardener program will always use the Better Impact online application form called "Volunteer 1". You will not need to use "Volunteer 2" or "Volunteer 3".
- If at all possible, have applicants apply online. It will create less work for everyone, and it will get them started using Better Impact from the beginning. The application is mobile friendly, for volunteers who do not have a computer at home but who do have a smart phone or tablet. If a volunteer does not have a computer or mobile device, see if there are public places where they can go to complete the application, such as a library or a public computer at a Virginia Cooperative Extension office.
- If there truly is no other option, you can give a prospective applicant a paper form (the EMG State Office is working on creating a new version to match what is on Better Impact.) An admin in your unit will then have to add a new volunteer profile in Better Impact and put in all the information from the paper form into that profile.
- Remember to 'save' in Better Impact as you make changes to settings.
- In order to see what the applicant will see as you update the application form, click on the green 'Interactive Sample Form' button at the top of the Application Form Settings page (Configuration > Recruitment > Application Form Settings). Once there, you don't have to fill anything in to move to the next page – just click "save and continue".
- Because some application information should be considered confidential, please pay attention to which admins in your unit have Better Impact Administrator roles that give them access to view, change, and search for users' Contact Details and Custom Fields. Individuals with that access should be made aware that information such as an individual's disclosure of criminal history, demographic information, and contact information should be treated confidentially.

Application Form Settings that Need to be Set Before Enabling the Application

Some of these settings require decisions or entering text, so be sure to include any admins who should be part of this decision-making and communications development.

- **Under Configuration > Recruitment > Application Form Settings > General Settings**
  - **The box for "New Volunteers Require Approval" must always be checked!** The system lets you uncheck it but, if you did that, an applicant would automatically be able to see and join all of your activities, report hours, etc. Because we require that applicants be screened and accepted before being considered enrolled as a trainee, you should always keep this box checked.
  - You will probably want to check the box and fill in the text to automatically send an email to new applicants after the volunteer application form is filled out. You can include links to websites and documents there, if you want. This would be a good place to let volunteers know what to expect from the screening process, the timeline for application

review, and who to contact if they have questions in the meantime. If you want to accept references online (Qualtrics, Google Forms, etc.) the reference link could be listed here.
  - When you are ready for your application to be live (i.e. visible to the public), you will need to uncheck the box that says "Disable this application form." This box also needs to be unchecked if you want to view the Interactive Sample Form.
- **Under Configuration > Recruitment > Application Form Settings > Step One Settings**
  - We recommend that you keep all the boxes under Step One Settings unchecked, but it is possible to change those if you have a reason.
- **Under Configuration > Recruitment > Application Form Settings > Step Two Settings**
  - Decide whether to turn on **General Availability**. Checking the box will add a section to your application where the applicant can indicate the days and times of the week that they are typically available to volunteer. Reasons to include this would be so that you can figure out if an applicant is available at the times when most of your projects happen and, also, once they are accepted, it allows for some matching between volunteers and activities. Reasons to not include it would be if you feel that it is not information you would ever use or if you feel that it makes the application too long or confusing for applicants.
    - If you decide to turn on the General Availability question, there is another place in Step Two where you can put in a header for that section where you give it a name and explain to the volunteer what you want them to do on that part of the application.
  - Decide whether to turn on **General Interests**. Checking the box will add a section to your application where the applicant can indicate the kind of volunteer work that they want to do, using a checklist. You create the choices for the checklist at the unit level, but we have created some at the state level that you can use as well. Reasons to include this would be so that you can learn about the kind of volunteer work that interests the applicant.
    - If you do want to use General Interests, you will first need to create some General Interests! Go to Settings > Recruitment > General Interests.
    - If you decide to turn on the General Interests question, there is another place in Step Two where you can put in a header for that section where you give it a name and explain to the volunteer what you want them to do on that part of the application.
  - Decide which, if any **Classifications** to show on your form.
    - We recommend *not* putting **Activity Classifications** on your application form at this point. There is not a way to explain to the applicant what it is, and we think new applicants will find it confusing. We also feel that it is too much to add to an already long application. We do have Activity Classifications turned on in the volunteer profile, so volunteers accepted into the program can and should indicate which of those Activity Classifications interest them later on by editing their profile.
    - Right now, the other types of Classifications do not seem relevant for our program.
  - You do not need to put anything in for "Qualification Form Header" or "Custom Field Form Header". Leave those blank.
  - The default text for the "Override notice to complete application form" is probably adequate, but if you check the Interactive Sample Form (see "General Notes" above) and want to change it, the box for doing that is here under Step Two.

- **Under Configuration > Recruitment > Application Form Settings > Application Complete Settings**
    - You may put in text to show on the screen after an applicant submits the application form. This could be where you tell them to watch for an email with more information or tell them what to expect next. Use the box for “Text to show if there are no activities for the volunteer to sign up for”, not the second box. Because the applicant is not yet accepted, there should be no activities for them to sign up for.
- Look through the **Interactive Sample Form**. (See "General Notes", above.) Do the questions we have created cover what you would want to know from applicants? If not, please contact us about what you would want to see added.

Other Decisions That your Unit Needs to Make Before Enabling the Application

- You will need to decide where to put the basic information about your training and unit that an applicant would need, such as the dates/times of the classes, cost, a contact person for questions, ADA statement, etc. You have several options:
    - Put this information on a unit website, and direct prospective applicants there to get the information and the link to the online application form.
    - Put this information in the “Public Page Volunteer Message” and direct applicants to that page, which automatically has a link to the online application form. To edit the Public Page Volunteer Message, go to Configuration > Recruitment > Public Volunteer Page Settings. Please note that you can create links to other websites using the text you put in as well as links to documents that you upload using the File Manager. Therefore, if you want, you can keep your course information in a PDF document, and just link to it from that Public Page Volunteer Message. To see what your unit’s public page will look like, go to Configuration > Recruitment > Links for Website. With Home Page marked, click on 'Generate Link'. You can then click on the Preview, or use the URL to visit the Public Pages.
    - Send out the course information via email to a list of prospective applicants and include the link to the online application.
- You will need to decide how you want to direct prospective applicants to your application form. Options include emailing them the link or posting the link on your unit webpage. You can choose whether to provide the link directly to the application form or to provide a link to your unit’s Better Impact public page (see above), where there is automatically a link to the application form. Either way, to get the URL to use, go to Configuration > Recruitment > Links for Website. Note that you can also provide a link to a mobile version of the application form.
- You will need to decide **how and when you will collect your course fees**. Our suggestion is that you wait to collect the fee from the applicants only after they are accepted, rather than requiring the fee to be paid before their application is complete. The reason for this recommendation is that then you will not have to issue a refund should they not be accepted. With the implementation of the State Office Program Fee model now in place for all trainings, all units have access to credit card payments through Destiny One. The State Office will take on any associated fees (system fee and credit card fees). We highly recommend using this system and there are ways to do so even if an EMG Association is collecting the funds. If you do take cash or checks, CALS Finance has put together a training for Unit Administrative Assistants to show them how to do this with the Program Fee. **Please reach out to Kathleen (reedka@vt.edu) with any questions about the Program Fee and using DestinyOne.**

- You will need to decide who receives **notification emails** about newly completed applications. To set up an Administrator to receive application notifications, please go to the Administrator's profile, then choose Main > Miscellaneous > Administrator tabs. Select 'new volunteer application notifications.'
- You will need to decide how you will contact the applicant's references. As part of the application, the applicant will put in names, addresses, phone numbers, and email addresses for three references. There is not a place in the Better Impact system for the person who is serving as a reference to fill out a questionnaire or upload a form or letter themselves. You may choose to check the reference through a phone conversation, through a written form mailed or emailed from and returned to an admin, or by having the reference fill out an online survey that you set up separately. There is a place in Better Impact for an administrator to upload a completed reference form, once you receive it back from the reference.

Additional Features You Can Use As You Collect and Screen Applications

- **Update the Volunteer Status**
    - You can update an applicant's status from Applicant to In Process as you are screening them. This can be done by bulk update; it doesn't have to be one-by-one (People > Volunteers > Bulk Volunteer Status Change). This will allow you to easily search for and pull up the list of people whose applications you are reviewing and distinguish them from applications that have come in too late for consideration, but that you want to save for next time.
    - Once applicants are accepted into your Training, you can change their status to Accepted. This will give them access to see and sign up for activities and report hours, so you should wait to do this until close to the training start date.
- **Update Custom Fields**. There are Custom Fields in each person's profile labeled for Office Use Only, such as "Application Requires Further Action", "Application Met Qualifications", "Background Check Submitted", and "Course Fee Paid". You can check these boxes or put in dates for applicants as appropriate to help you keep track of things. In addition, there are Custom Fields included for each of the references where you can indicate the date the reference was checked and even upload a file with the reference check results. If you have the references email you a completed form, this is a good place to store that document so that it stays in the person's profile.
- **Update Qualifications**. There are Qualifications you can apply to applicants for "References Received" (one or both), "Applicant Interview" (yes/no), and "Volunteer Background Check" (complete and passed, complete with restrictions, and incomplete.) You should use these Qualifications to document completion of the screening steps.
- **Enter Editable Notes.** There is a Notes box in the person's profile Main > Miscellaneous tab under Volunteer Settings. Here you can add progress notes about the screening process, etc. that can later be deleted when these notes are redundant. They will not be permanent notes like the ones you can make in the volunteer's Note Log.
- **Enter Permanent Notes.** Each volunteer's profile also has a *permanent* Note Log, found in the Communications tab of their profile (and not to be confused with the Notes box in the Volunteer Settings mentioned above). This is a record that stays with the volunteer but is only viewable to administrators, not the volunteer. You can use the Note Log to document important information from the screening process that should remain in their profile, as well as transfer information, any disciplinary actions, etc. You can bulk add Note Logs to multiple volunteers all at once. As it

is viewable to administrators, please be cautious about what personal information you include there. You will not be able to delete any notes added here.

After Your Application Period Closes

- **Under Configuration > Recruitment > Application Form Settings > General Settings**
    - Please disable your application form by checking that box. This will prevent accidental submissions.