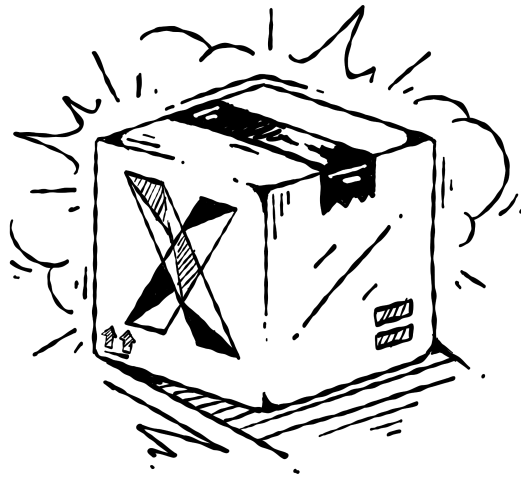




CityServeX "Box"

Care Champion Fast Facts

Section 04,

VOLUNTEER MANAGEMENT SYSTEM



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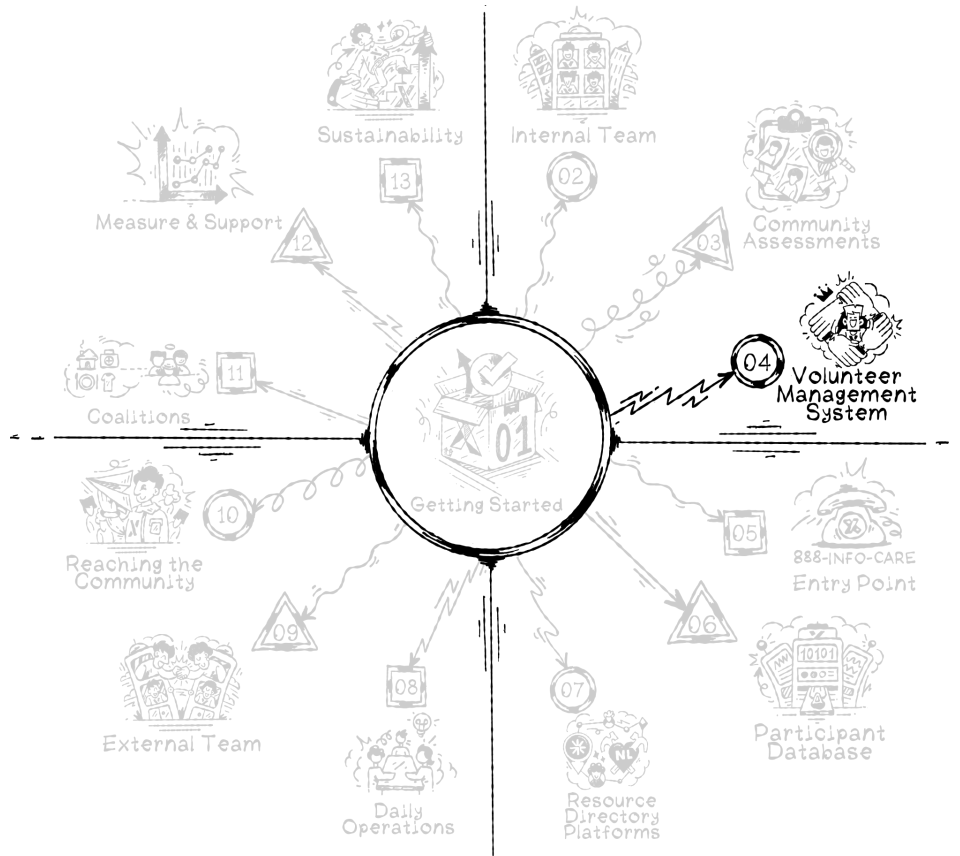
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04: Volunteer Management System





Manage Your Site. Support Your Volunteers.

4.0 POINT is the volunteer management system CityServeX offers to sites as a tool for onboarding and tracking volunteers. Its primary function is to keep track of volunteer onboarding and volunteer hours. This document outlines the policies and daily procedures Care Champions follow to manage their site on the POINT platform.

POINT



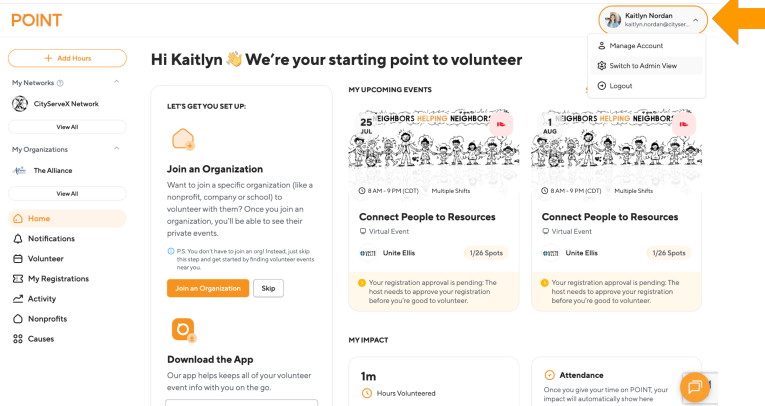


Accessing the POINT Platform

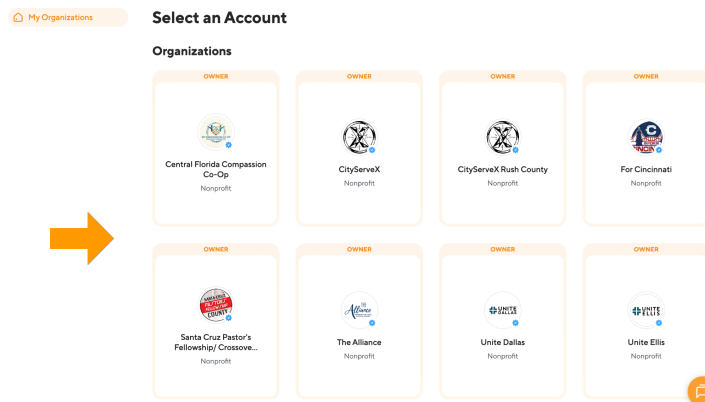
4.1 Policy: Care Champions must access their site through the correct Admin View before performing any administrative action on the POINT platform.

Procedure:

- Log into your account and navigate to "Admin View."



- Choose the correct site.



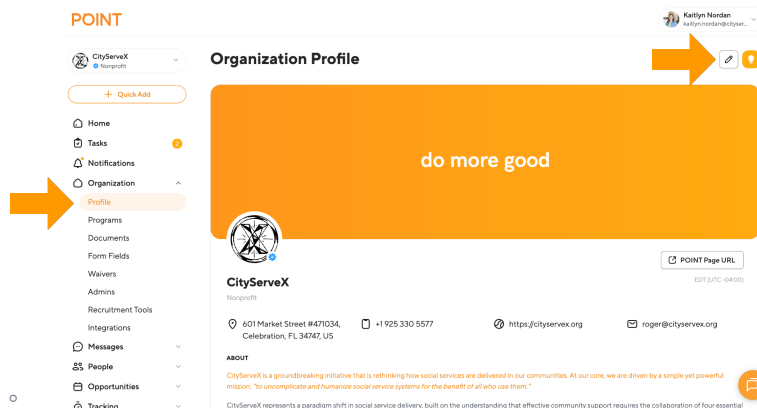


Maintaining the Organization Profile

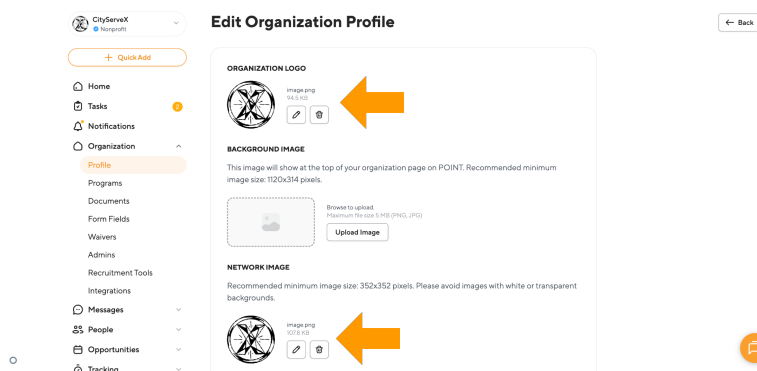
4.2 Policy: It is the Care Champion's responsibility to keep site information up to date on the POINT platform for volunteers and for individuals seeking services.

Procedure:

- Navigate to "Organization" > "Profile" > "Edit" (the pencil icon).



- Update relevant information.



- Be sure to "save."



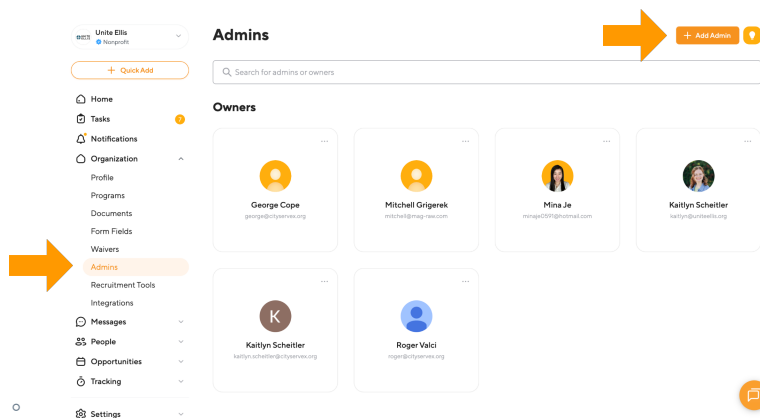


Managing Admins and Owners

4.3 Policy: If anyone on the Care Champion's team needs Admin or Owner access, the Care Champion can add them through the site's Admin section. Owners hold greater permissions than Admins and this distinction should guide who is granted Owner status.

Procedure:

- Add "Admins" > "add the contact you want" > press the three dots to toggle their status from Admin to Owner.



Note: Owners have more permissions than Admins, specifically the ability to edit the organization profile, change admin roles and permissions, access the embed code for the POINT website integration, change subscription/billing plans and settings, change the organization's volunteer join settings, and update the Volunteer Hour Stat (used to calculate the organization's economic impact).



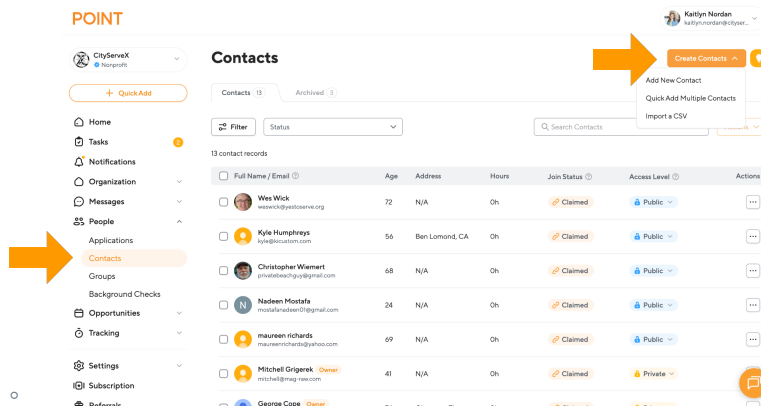


Adding and Importing Contacts

4.4 Policy: New volunteer contacts must be added using the invite-to-claim process so volunteers create their own POINT account and complete the application directly.

Procedure:

- Navigate to "People" > "Contacts" > "Create Contacts" > "Add New Contact" or "Quick Add Multiple Contacts"



- Be sure to select "Create contacts and invite them via email to claim their POINT account" before inputting the email address for the volunteer/s.

Availability
Select

☐ Create Contacts only
You can always invite volunteers later.

☒ Create contacts and invite them via email to claim their POINT account
Volunteers will be invited with "Private Access". You can always change it later.
[View more about invite emails](#)

Add Contact and Invite

- Once selected, the volunteer/s will be prompted directly from their email to create an account and complete the volunteer application.

The only required information is First and Last name and email address.





Note: They will be prompted directly from their email to create an account and complete the volunteer application. Select the Create Contacts button before inputting the email address for the volunteer.



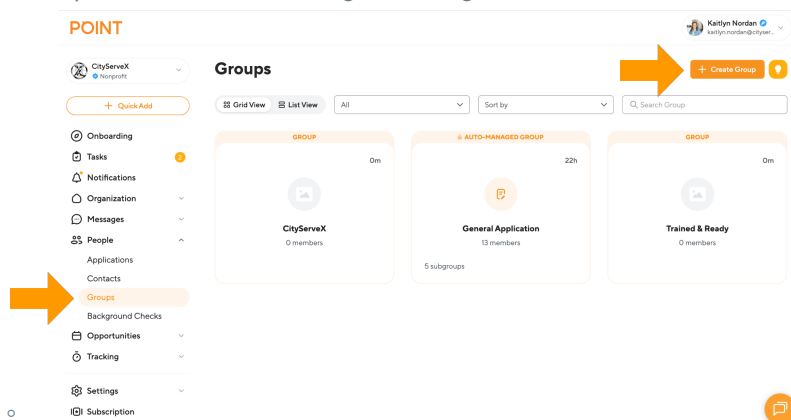


Organizing Volunteers via Groups

4.5 Policy: Care Champions need to organize volunteers and track where they are in their onboarding process. They can utilize Groups to do this.

Procedure:

- Utilize groups to categorize volunteers. Care Champions can choose how they would like to do this. The site is set up for Care Champions to move volunteers into a "Trained & Ready" column once through training.





Managing Daily Tasks and Applications

4.6 Policy: Care Champions must stay up to date on volunteer activity by reviewing the "Tasks" section of the POINT platform daily.

Procedure:

- Review new applications.

- Review the stages using the buttons at the bottom and "See Content."

Tip: This pause is a great opportunity to reach out to the volunteer and set up an interview, if one has not already been scheduled.

- Once confident in moving the volunteer forward, "Approve and Advance" them.
- After completing the application process, the volunteer will have all required paperwork finished, including the application questions, job description, and confidentiality agreement.





Approving Volunteer Hours

4.7 Policy: Volunteer hours are submitted to the Care Champion for approval. The Care Champion is responsible for reviewing and approving hours via the "tasks" section of the admin page.

Procedure:

- Navigate to "Tasks" > "All" or "Hours"
- Review the content and either "Approve", "Deny", or "Edit"

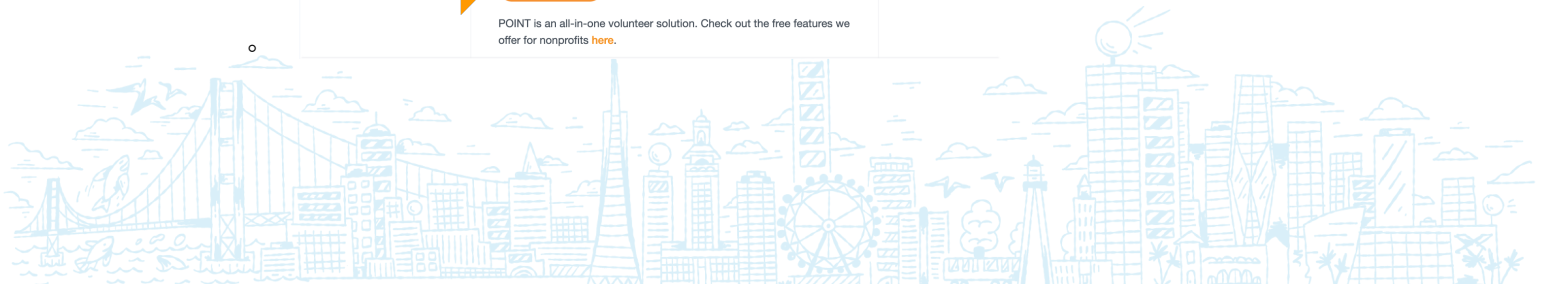
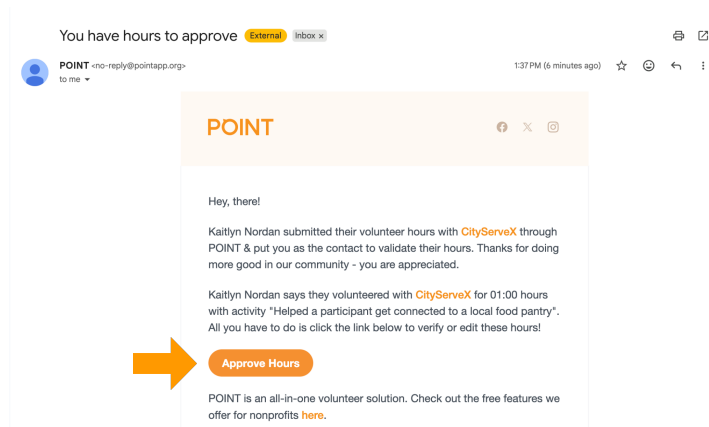


Tasks

All 3	Applications 2	Hours 1	Checkins 0
1 contact record			
Approve All			
Date	Hours	Full Name / Email	What did you do
Jul 23, 2026 3 PM - 4 PM (EDT)	1h Future	 Kaitlyn Schettler kaitlynschettler@cityservex.org	Self Submitted: Helped a participant get connected to a local food pantry
		Approve Deny Edit	



-
- When a volunteer submits hours, an email notification will be sent to the Care Champion's inbox.





Managing Events and Shifts

4.8 Policy: Care Champions assign volunteers to their shifts. Volunteers are automatically signed up for shifts once assigned. Care Champions are responsible for ensuring shifts are available to match volunteer availability.

Procedure:

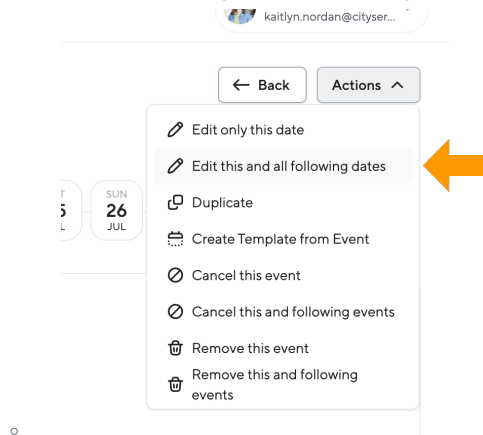
- "Opportunities" > "Manage Events" > "View Volunteers" > "Actions" > "Assign Spots".



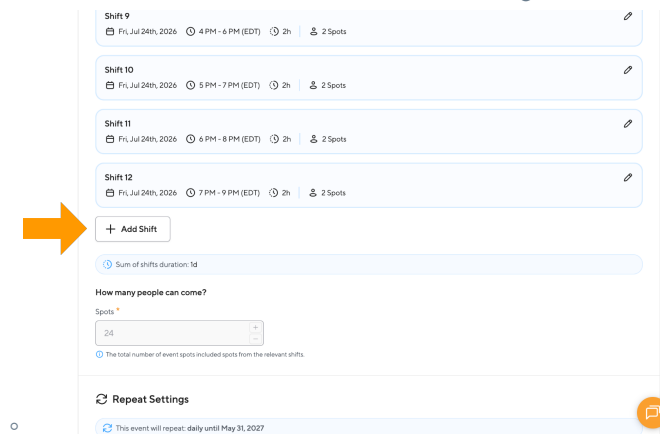


If a volunteer requests a shift time that is not already available, the Care Champion should create a shift for the volunteer:

- Choose a day that has not yet taken place > "Edit this and all following days."



- Go to "When and Where" and scroll down to find "Add Shift."
- Fill the shift information out according to the hours the volunteer wants to serve.





Tracking Volunteer Hours

4.9 Policy: Volunteer hours must be tracked accurately, whether logged by the volunteer or added manually by the Care Champion.

Procedure:

Tracking Volunteer Hours:

- Navigate to "Tracking" > "Hours"
- Here the Care Champion will see when volunteers have served

Hours

All historic and future hours

+ Add Hours

+ Quick Add

Filter

Search by Contact Name

Export CSV

Jan 01, 2026 - Jul 23, 2026

1h Approved Hours

1 Contacts

0 Events

\$36.14 Economic Impact

1 contact records

When	Contact	Hours	Status	Source	Event	Program	Actions
Jul 23, 2026 3 PM - 4 PM (EDT)	Kaitlyn Schettler kaitlynschettler@cityserve.org	1h Future	Approved	Volunteer	n/a	n/a	...





Adding volunteer hours manually:

- Press "Add Hours".
- Select "Contact".
- Select "Add".

Add Hours ×

If your volunteer signed up for an opportunity on POINT, then their hours will automatically be added to their record once you check them in. For all other volunteer activity, use this form to add the hours to your account.

Contact Name *
+ Select Contact

Program
+ Select Program

Start Date *
 📅
Month / Day / Year

Start Time *
 🕒
Hours Minutes

Duration *

Hours Minutes

🕒 End: 07/23/2026 at 3:11 PM

Comment

Add



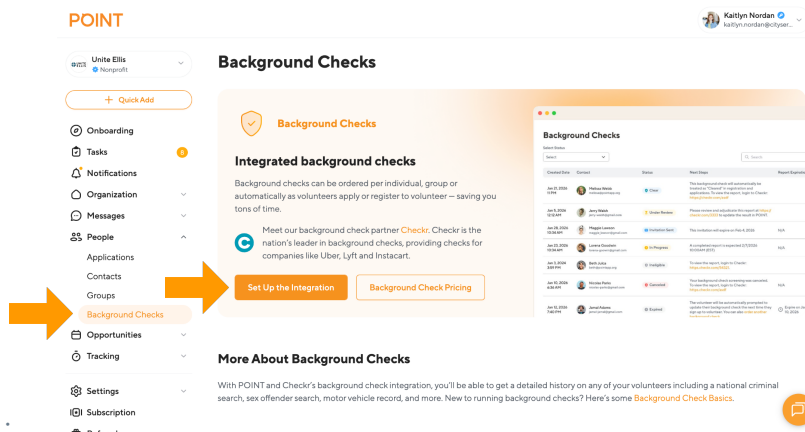


Setting up Checkr Integration (Optional)

4.10 Policy: POINT's chosen background check software integration is with Checkr. If the Care Champion chooses to utilize Checkr, they will need to set up the integration themselves through the POINT system.

Procedure:

- Navigate to "People" > "Background Checks" > "Set Up Integration"
- The Care Champion will need to select "Create a new Checkr Account" or "Connect an existing Checkr Account" based on the site's status
- Follow the prompts through the Checkr site
-



Configuring Background Checks in the Application Process

Policy: If a Care Champion decides not to use Checkr, they may instead configure the volunteer application to guide volunteers through an alternate background check process.





Procedure:

- Edit the application to add a pathway for conducting background checks:
- Navigate from "People" > "Applications" > "View General Application (eye icon)" > "Actions" > "Application Settings" > "Application Flow" > "Create Draft Version" > "Add Stage" > "Custom Content".

Custom Content

You can also add custom content to the application process. This can include an explanation of what it's like to volunteer with your organization, links to webpages or videos they should review, and Documents (like a Volunteer Manual). Candidates will check a box saying that they've reviewed the content.

Name of Content *

Watch the Training Video

Instructions for Candidates *

Normal B I U G H A [icon] [icon] [icon] [icon] [icon]

Total characters: 0/10000 Visible: 0 Formatting: 0

+ Upload Document Select from Library

Save as Draft Preview Application Settings Publish

- Fill in the information to guide volunteers to whatever background check process the Care Champion has chosen (insert a link for volunteers to register for background checks, or insert a set of instructions for volunteers to complete).

Note: The Custom Content stage requires volunteers to check a box stating they have completed the content described before moving on in the application.



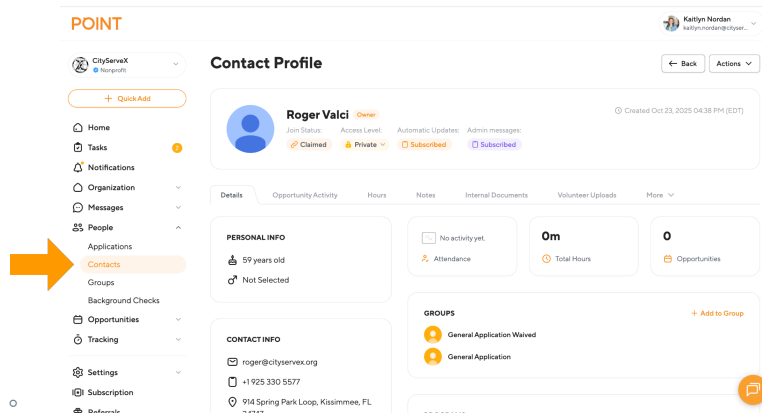


Managing Volunteer Profiles

4.11 Policy: Care Champions should use each volunteer's profile as the source for their application history, activity, documents, and group assignments.

Procedure:

- From Contacts, click into a volunteer's profile.



Here you can:

- View application answers.
- View activity and hours served.
- Store and view documents.
- Organize volunteers by groups.





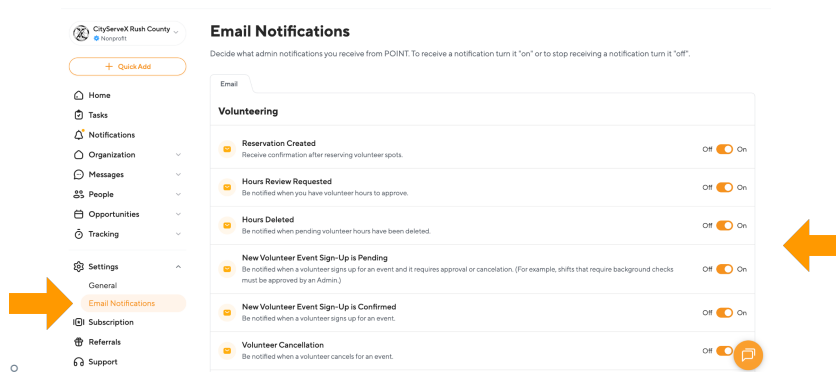
Configuring Site Settings

4.12 Policy: Admins and Owners have the ability to change site settings. Because notification settings are account-specific, Care Champions must confirm their own settings support their duties.

Procedure:

Email Notifications:

- Email Notifications can be toggled under "Settings" > "Email Notifications"
- Toggle the settings using the "on"/"off" switch



Note: Toggling notifications off/on only changes the notification for the account that makes the change. Care Champions should make sure they are properly notified to fulfill their duties.





Getting Help With POINT

4.13 There are several options for support with POINT.

- Talk to real person:
 - Contact **Kaitlyn Nordan** or **Roger Valci**. They can help you out.
 - Ask a fellow Care Champion in the CSX national network.
 - Join our Monday call with POINT at 1pm EST.
 - Log into POINT and find the chat option. Ask for Kate. She's amazing!
- Search for yourself:
 - Go to CSXU. Login as a Care Champion and look for stop 04. There is a ton of PDF's, Fast Fact sheets and YouTube videos there.
 - POINT has plenty of help online at <https://dash.pointapp.org/admin/support>





Keeping Daily Operations on Track

4.14 Consistent daily use of the steps above — reviewing tasks, approving volunteers and hours, keeping shifts current, and maintaining accurate volunteer records — keeps the site running smoothly for both volunteers and the people they serve. Return to any section as needed, and complete the items flagged above as this document is finalized.

