



CityServeX New Site Set-Up
POINT Volunteer Management System
Section 04

POINT



04: Volunteer Management System

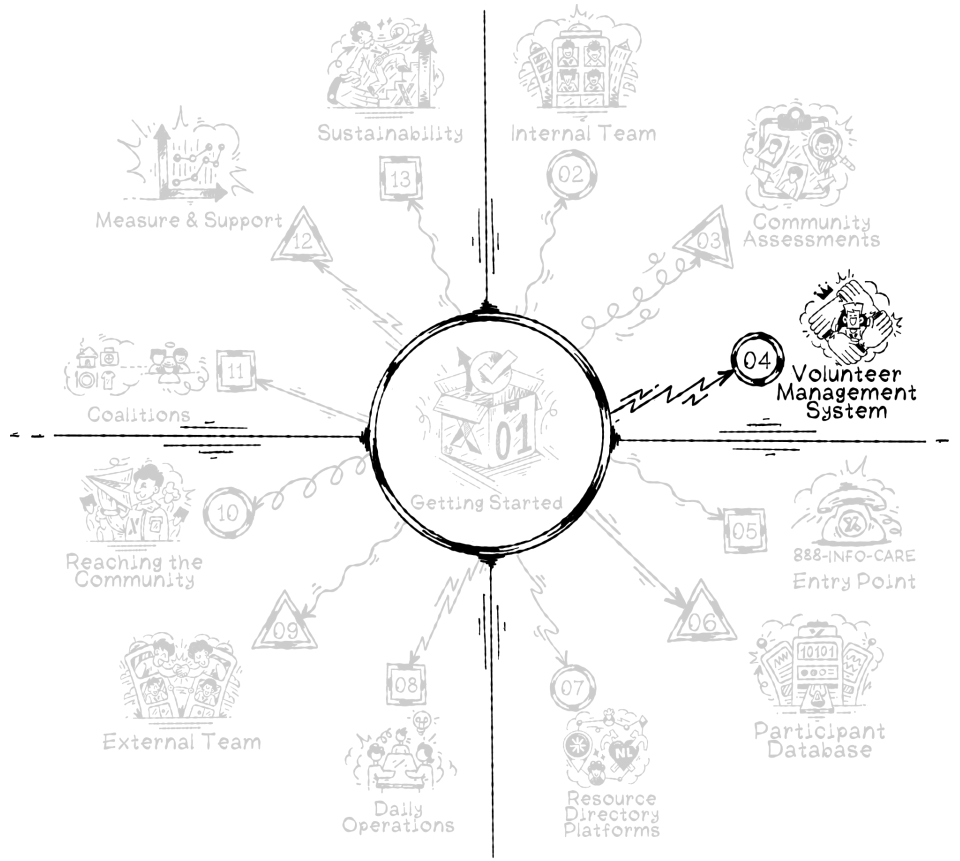




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4.0 Site Set-Up Policies & Procedures for Care Champions

Configure Your Site. Launch Resource Coordination.

This document provides the step-by-step policy and procedure for setting up a POINT site for Resource Coordination, per the needs of a CityServeX site, so it is ready for Care Champion and volunteer use. Follow these steps in order when launching a new site. Return to individual sections as needed for ongoing configuration.

4.1 Collect Site Specific Information

Policy: Site configuration must not begin until the Care Champion's site-specific details have been collected. Proceeding without this information risks an inaccurate or incomplete setup.

Procedure:

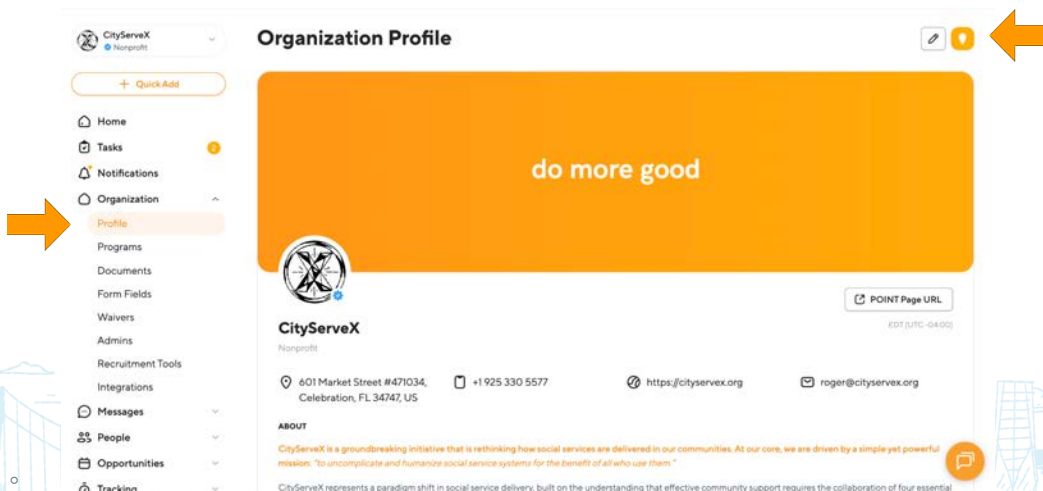
- Send the Care Champion the Google form requesting the details specific to their site.
 - [Google Form](#)
- Retain this information — it will be used throughout the remaining steps in this guide.

4.2 Configure the Site's Profile

Policy: The organization profile must accurately reflect the site-specific information collected from the Care Champion before any programs, fields, or admins are configured.

Procedure:

- Navigate to Organization → Profile → Edit.





- Fill in the information previously collected from the Care Champion in Step 1.
 - Organization Image - 352x352 pixels
 - Background Image - 1120x314 pixels

- Network Image - 352x352 pixels
- Organization Name: "site's name"
- EIN: "99-4725070"
- Address: "site's address"

- Contact Email Address: "Care Champion's CSX email address"
- Contact Phone Number: "Care Champion's Number"
- Website URL: "site's URL"
- About: "Site's Description"
- Event Causes: Select "Poverty", "Food", "Health", "Education", "Family", "Crisis", "Homeless", "Jobs", and "Community Development"



• Underrepresented communities experience service inequities in our region
• Nonprofits deliver specialized expertise and direct service excellence
• Faith communities offer trusted community connections and moral guidance

Total characters: 4085/10000 Visible: 3284 Formatting: 801

EVENT CAUSES

Poverty	Food	Health	Education	Family
Crisis	Homeless	Jobs	Religious	

Edit Causes

DOCUMENTS

Add Document Select from Library

Save

-
- Press: Save





4.3 Create the Resource Coordination Program

Policy: The Resource Coordination program must be created before the volunteer application is built.

Procedure:

- Navigate to Programs → Create Program. **Name:** "Resource Coordination."





4.4 Create Custom Form Fields

Policy: All required form fields must be created before the volunteer application is built. Required form fields must be confirmed as available before "Build the Volunteer Application".

Procedure:

- Navigate to Form Fields → Add Custom Field.
 - **Complete the form fields using the information provided in the images below**

The screenshot shows the 'Form Fields' section of the CityServeX application. A modal window titled 'Create New Custom Field' is open, allowing users to add a new custom field. The modal contains the following fields:

- Field Name ***: A text input field with the placeholder 'Field Name'.
- Question Label ***: A text input field with the placeholder 'Question Label'.
- Answer Field Type ***: A dropdown menu with the option 'Select'.

At the bottom of the modal are 'Close' and 'Create' buttons. In the background, the 'Form Fields' list is visible, showing existing fields like 'First and Last Name', 'Birthdate', 'Address', 'Phone Number', and 'Education Background'. An orange arrow points to the '+ Add Custom Field' button in the top right corner of the interface.

The following table lists the pre-defined form fields shown in the screenshot:

Field Name	Field Type	Required	Preview
First and Last Name	Name	Required Question	Preview
Birthdate	Date	Required Question	Preview
Address	Text Field	Required Question	Preview
Phone Number	Text Field	Required Question	Preview
Education Background (High School, College, Degree, etc.)	Text Field	Required Question	Preview



Faith Community Affiliation (If any?)

[?](#) Faith | [Text Field](#) | [Preview](#)

Language Skills

English, Spanish, Chinese, Arabic, French, Korean, Portuguese, Ukrainian, Hindi, German, Italian, Japanese, Gujarati, Punjabi, Hebrew, Russian

[?](#) Language Skills | [Multi Select](#) | [Required Question](#) | [Preview](#)

What are your communication preferences?

Yes - to both texting and email communications, Email Only

[?](#) Communication | [Single Select](#) | [Required Question](#) | [Preview](#)

Employment Status

Yes, I'm employed but have flexible hours, Yes, I'm employed, and only available evenings & weekends, I'm not employed, but looking for work, I am not employed, and I am not looking for work, I'm retired.

[?](#) Employment | [Single Select](#) | [Preview](#)

If applicable, who is your current employer?

[?](#) Employer | [Text Field](#) | [Preview](#)

When are you available to volunteer?

Monday mornings, Monday afternoons, Monday evenings, Tuesday mornings, Tuesday afternoons, Tuesday evenings, Wednesday mornings, Wednesday afternoons, Wednesday evenings, Thursday mornings, Thursday afternoons, Thursday evenings, Friday mornings, Friday afternoons, Friday evenings, Saturday mornings, Saturday afternoons, Saturday evenings, Sunday mornings, Sunday afternoons, Sunday evenings

[?](#) Availability | [Multi Select](#) | [Required Question](#) | [Preview](#)

Skills & Experience

[?](#) Skills & Experience | [Text Field](#) | [Preview](#)

Certifications

[?](#) Certs | [Text Field](#) | [Preview](#)

Previous volunteer experience

[?](#) Volunteer Experience | [Text Field](#) | [Preview](#)

Community affiliations, if any

[?](#) Community Affiliations | [Text Field](#) | [Preview](#)

Emergency Contact

[?](#) Emergency Contact | [Contact Field](#) | [Required Question](#) | [Preview](#)



Confirm: Make sure all required form fields are available before publishing the application in Build the Volunteer Application





4.5 Add Background Check Waiver

Policy: A waiver is utilized to gain consent from volunteers for the possibility of running a background check. Regardless of whether or how background checks are ran, this waiver should be created and published before publishing the application in Build the Volunteer Application.

Procedure:

- Navigate to Waivers → Add Waiver →

POINT

Kaitlyn Nordan
kaitlyn.nordan@cityser...

Volunteer Waivers

+ Quick Add

Agreement Frequency: All

Search Waiver

3 Waivers

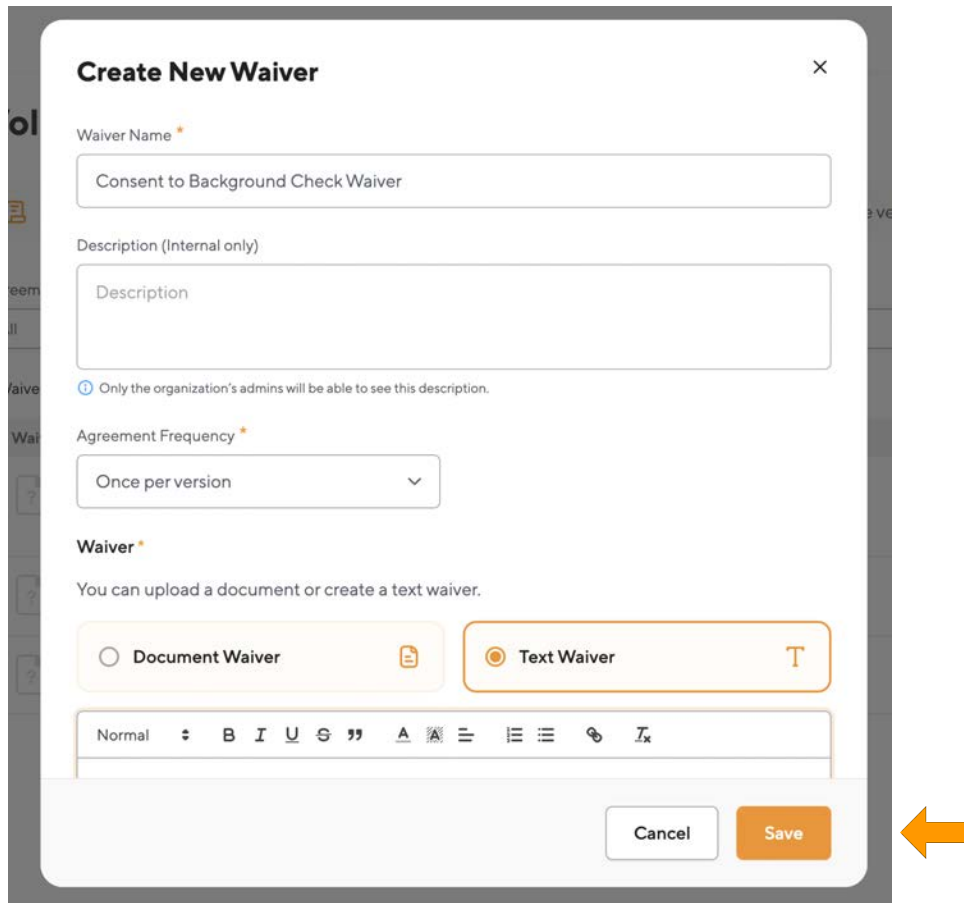
Waiver Name	Latest Version	Agreement Frequency	Modified by	Modified	Actions
Updated 1/14/2026 Consent to Background Check Waiver	1	Once per version	Mina Je	01/14/2026	...
Waiver for Possible Background Check	1	Once per version	Mina Je	11/04/2025	...
TBD	1	Once per version	Mina Je	10/24/2025	...

Onboarding
Tasks
Notifications
Organization
Profile
Programs
Documents
Form Fields
Waivers
Team
Recruitment Tools
Integrations
Messages
People
Opportunities
Tracking

+ Add Waiver

- Waiver Name: "Consent to Possible Background Check Waiver"
- Description: Input nothing
- Agreement Frequency: Once per version
- Waiver: Text Waiver





This requirement varies depending on where you'll be serving and other factors. At this time in the process of applying to serve, we just need you to check this box that you understand that you may be required to complete a background check. if it is required, we'll let you know that at a later time."



4.6 Add Site Owner(s)

Policy: The site's Care Champion must be added as an Admin and elevated to Owner status before application and event configuration continues. The Care Champion will need to follow up via their email to claim their ownership status.

Procedure:

- Navigate to Team → Invite Teammate →
 - Email: "Care Champion's Email" → Continue

The screenshot shows the 'Invite Teammate' dialog box with the 'Details' tab selected. The 'Email' field is populated with 'Just.testing@cityservex.org'. A message below the field states: 'We couldn't find a contact with this email in your organization. Add their name to invite them to your team.' Below this message is a suggested contact card for 'Just.testing@cityservex.org'. The 'First Name' field contains 'Just' and the 'Last Name' field contains 'Testing'. The 'Continue' button is highlighted with a red arrow.



- Pick Access: Entire Organization → Continue

Manage Your Team

Details **Pick Access** Confirm and Invite X

What will this person manage?

Tell us a bit about what this person will be doing so we can recommend the right access.

☒ Entire organization ←

Available on **TEAMS**

☐ Billing & subscription only

☐ One or more programs

☐ Specific events

☐ Volunteer groups

Back Continue ←





- Change Role → Owner → Continue

Details

Pick Access

Confirm and Invite

✕

✓

Recommended Access

★ Based on your selection, we recommend:

 **Admin**
Runs day-to-day operations across the organization
Best for: Operations lead / Leadership team

 **Organization-level access**

- ✓ Manage programs, events, and people
- ✓ Access reports and tracking
- ✓ Send messages across the organization
- ✓ Manage workflows and operations

 **Not included**

- Organization deletion
- Subscription management



Change Role

Continue

-





Details

Pick Access

Confirm and Invite

✕

✓

Pick Access

☒

Owner
Manages everything across the organization
Best for: Organization owner / Executive Director

Organization-level access
✓ Full control of organization settings
✓ Manage admins and ownership
✓ Billing and subscription
✓ Delete the organization

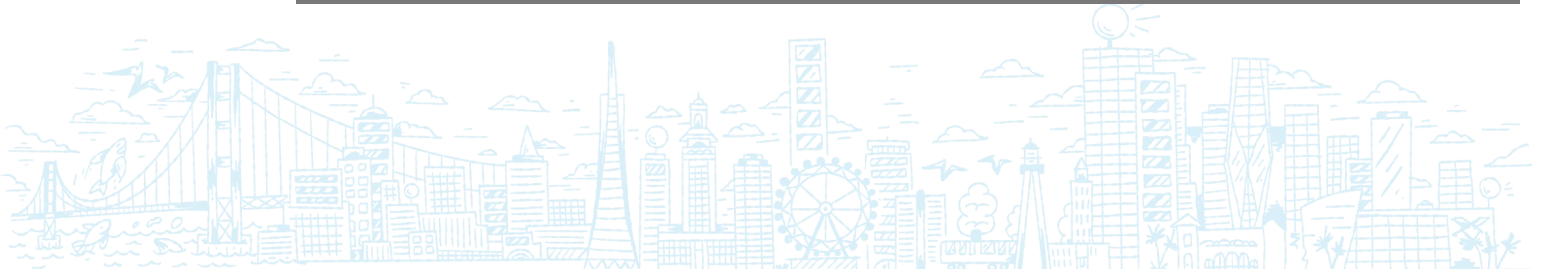
Not included
• Full access granted

☐

Admin
Runs day-to-day operations across the organization
Best for: Operations lead / Leadership team

Back

Continue





- Add Team Member

Search by name, email or role

Details Pick Access Confirm and Invite X

Confirm and Invite

Just Testing (Just.testing@cityservex.org) will be added as a:

 **Owner** 

Manages everything across the organization

Back Add Team Member

Kaitlyn Scheitler





4.7 Build the Volunteer Application

Policy: Every site must have a published General Application before volunteers can apply. If an application already exists, it must be edited as a draft version rather than altered live. All the stages below must be configured.

Procedure:

- Navigate to People → Applications.
 - **If nothing** → Create New
 - **If unpublished:** edit and complete the application, then publish it.
 - **If already published:** click the view (eye) icon → Actions → Create Draft Version to edit it.

4.7.1 Application Settings — Basic Info:

- **Name:** "General Application."

- **App Type:** General Application.
- **Application Expiration:** No Expiration.
- **Privacy Setting for Approved Volunteers:** Private.





4.7.2 Application Flow:

CityServeX
Nonprofit

General Application v27 Draft [← Back to Application Details](#)

[+ Quick Add](#)

- Home
- Tasks
- Notifications
- Organization
- Messages
- People
- Applications**
 - Contacts
 - Groups
 - Background Checks
- Opportunities
- Tracking
- Settings
- Subscription
- Referrals
- Support

Once an application is live, volunteers must be Approved or Waived to participate. General Applications act as the primary entry point for all new volunteers across the organization. Program-level Applications are specific to a chosen program; POINT will prompt volunteers to apply when they visit a Program page or attempt to sign up for an associated event. Volunteers with an approved status for a specific application can sign up for events instantly, while all others must complete the application to proceed. [Learn more about the General Application.](#)

Application Settings > **Application Flow**

Application Flow

- Introduction
- Tell us more about you
- Review the Description
- Confidentiality and Non...
- Consent to Possible...
- Let's Talk
- End of Application

Admin Review Add Stage

Introduction





4.7.3 Introduction (Text Description)

"Thank you for your interest in becoming a Resource Coordinator—you're going to love this journey!"

Resource Coordination is about meeting people where they are and connecting them to the help they need. As a Resource Coordinator, you'll listen to someone's situation, understand what matters most to them, and guide them toward resources—whether that's housing, food assistance, childcare, mental health services, or something else entirely. You're not just handing someone a list; you're walking with them, helping them navigate systems that can feel overwhelming, and making sure they actually get connected.

What you'll be doing is truly noble work. You're helping people uncomplicate social services and feel genuinely cared for in the process.

We're excited to help you get started. We'll just need a few pieces of information from you to begin the process. If you'd like to talk through the role first before applying, we're here for that conversation—just reach out and we can chat.

(insert scheduling link or information)

Once you've completed the application, we'll reach out to connect. We're looking forward to speaking with you!"





4.7.4 Tell Us More About You (Forms)

- Select Questions

Select Questions ✕

All 7 form fields are selected [Clear all selections](#)

- ☒ Form Field / Question Label
- ☒ Custom Field
Custom Field
- ☒ Dietary restrictions / allergies
Dietary restrictions / allergies
- ☒ Education
Education Background (High School, College, Degree, etc.)
- ☒ Gender
Gender
- ☒ Meal preference
Meal preference
- ☒ Name
First and Last Name
- ☒ T-Shirt Size
T-Shirt Size

[Add](#)

-
- Configure the questions to match those configured in the "Form Fields" section in Step 4.





- Referrals
- Support

Tell us more about you

Custom Questions

The volunteer questions will be displayed when a volunteer fills out the application.

First and Last Name

First and Last NameText FieldRequired QuestionPreview

Birthdate

BirthdateDateRequired QuestionPreview

Address

AddressText FieldRequired QuestionPreview

Phone Number

Phone NumberText FieldRequired QuestionPreview

Education Background (High School, College, Degree, etc.)

Education BackgroundText FieldPreview

Faith Community Affiliation (if any)?

FaithText FieldPreview

Language Spoken

English, Spanish, Chinese, Arabic, French, Korean, Portuguese, Ukrainian, Hindi, German, Italian, Japanese, Gujarati, Punjabi, Hebrew, RussianLanguage SkillsMulti SelectPreview

What are your communication preferences?

Yes - to both texting and email communications, Email OnlyCommunicationsMulti SelectRequired QuestionPreview

Employment Status

Yes, I'm employed but have flexible hours., Yes, I'm employed, and only available evenings & weekends., I'm not employed, but looking for work., I am not employed, and I am not looking for work., I'm retiredEmployment StatusSingle SelectPreview

If applicable, who is your current employer?

Current EmployerText FieldPreview

When are you available to volunteer?

Monday mornings, Monday afternoons, Monday evenings, Tuesday mornings, Tuesday afternoons, Tuesday evenings, Wednesday mornings, Wednesday afternoons, Wednesday evenings, Thursday mornings, Thursday afternoons, Thursday evenings, Friday mornings, Friday afternoons, Friday evenings, Saturday mornings, Saturday afternoons, Saturday evenings, Sunday mornings, Sunday afternoons, Sunday eveningsAvailabilityMulti SelectRequired QuestionPreview

Skills & Experience

Skills&ExperienceText FieldPreview

Certifications

CertificationsText FieldPreview

Previous Volunteer Experience

Previous Volunteer ExperienceText FieldPreview

Community affiliations, if any

Community AffiliationsText FieldPreview

Emergency Contact

Emergency ContactContact FieldRequired QuestionPreview

Select QuestionsOR+ Create New Custom Field



4.7.5 Review the Description (Custom Content)

- **Name of Content:** "Read the Job Description"

Review the Description

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 *

Read the Job Description

Instructions for Candidates *

Normal **B** *I* U ~~S~~ " " A

Please read the document and mark the box that states you have completed the action.

Total characters: 91/10000 Visible: 84 Formatting: 7

Resource Coordinator Job Description
resource...6 (1).pdf

+ Upload Document

Select from Library

- **Instructions for Candidates:** "Please read the document and mark the box that states you have completed the action."
- **Upload Document:** [Resource Coordinator - Volunteer Job Description 6.26](#)
- **Document Name:** Resource Coordinator Job Description

Add Document

Documents in your library can be attached to your pages and forms.

Resource... 6.25.pdf 45.55 KB

Document Name *

Resource Coordination Job Description

Description (Internal only)

Description

☐ Only the organization's admins will be able to see this description.

Cancel Add Document



4.7.6 Confidentiality and Non-Disclosure Agreement (Custom Content)

- **Name of Content:** "Agree to the Confidentiality and Non-Disclosure Agreement."

Instructions for Candidates:

"Resource Coordinators are entrusted with private details about the people they serve. Because of this, all RCs are required to sign a confidentiality agreement prior to beginning their role."

By checking the box below as "completed", you are acknowledging that you have read, understand, and agree to comply with all terms of the Confidentiality and Non-Disclosure Agreement, and that you understand violation of these terms may result in serious legal and professional consequences.

Presenting this agreement now, ensures that all documentation is completed as part of the application process should you join our team."

- **Upload Document:** [Confidentiality and Non-Disclosure Agreement Signature Removed 6.26.pdf](#)
- **Document Name:** Confidentiality and Non-Disclosure Agreement.

Referrals
Support

Confidentiality and Non-Disclosure Agreement

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 *

Agree to the Confidentiality and Non-Disclosure Agreement

Instructions for Candidates *

Normal | B | I | U | G | A | M | L | R | S | T | X

Resource Coordinators are entrusted with private details about the people they serve. Because of this, all RCs are required to sign a confidentiality agreement prior to beginning their role.

By checking the box below as "completed", you are acknowledging that you have read, understand, and agree to comply with all terms of the Confidentiality and Non-Disclosure Agreement, and that you understand violation of these terms may result in serious legal and professional consequences.

Presenting this agreement now, ensures that all documentation is completed as part of the application process should you join our team.

Total characters: 866/10000 Visible: 616 Formatting: 250

Confidentiality and Non-Disclosure Agreement
confiden... (2).pdf

+ Upload Document Select from Library



4.7.7 Consent to Possible Background Check (Waiver)

- **Waiver:** Select "Consent to Possible Background Check Waiver)

The screenshot shows the CityServeX application flow editor. On the left is a sidebar menu with options: Messages, People, Applications (highlighted with an orange arrow), Contacts, Groups, Background Checks, Opportunities, Tracking, Settings, Subscription, Referrals, and Support. The main area is titled 'Application Flow' and displays a sequence of steps: Introduction, Tell us more about you, Review the Description, Confidentiality and Non..., Consent to Possible... (highlighted with an orange icon), Let's Talk, and End of Application. Below this is an 'Admin Review' section with an 'Add Stage' button. The main content area is titled 'Consent to Possible Background Check' and contains a text block: 'A volunteer waiver protects a service provider, like your nonprofit, from liability in the event of an accident involving any of your volunteers.' Below this is a 'Waiver' dropdown menu showing 'Updated 1.14.2026 Consent to Background Check Waiver' and a '+ Create New Waiver' button. At the bottom are buttons for 'Save as Draft', 'Preview', 'Application Settings', and 'Publish' (highlighted with an orange arrow). The footer includes 'pointapp.org', 'Blog', 'Privacy Policy', 'Terms of Service', 'Version 15.129.1', and '© POINT'.

Note: This section will tentatively remain the same for all sites. A Care Champion may opt to change this to reflect their site's background check preference.



4.7.8 Let's Talk (Text Description)

"Once we have your application, acknowledgement of a possible background check, and confirmation that you have read the job description, the next step is on us.

We want to connect with you through a call or meeting. A conversation with you will help us learn more about what you shared and didn't share on your application.

Please schedule a meeting with Care Champion, [Care Champion's Name] at the following link (or 'via the following'): [Scheduling Link or information]"

Let's Talk

This is a good opportunity to welcome new volunteers and share any context for the rest of the application.

Text Description *

Normal B I U G H A [Icons]

Once we have your application and acknowledgement of a possible background check, the next step is on us.

We want to connect with you through a call. A conversation with you will help us learn more about what you shared and didn't share on your application.

We'll reach out through phone, text, or email soon to set that up at a time convenient for both of us.

Total characters: 401/10000 Visible: 358 Formatting: 43

Save as Draft Preview Application Settings Publish

pointapp.org Blog Privacy Policy Terms of Service Version 15 (29) © PDM





4.7.9 End of Application (Text Description)

"For now, this is all that's needed.

Expect to hear from one of our team members to schedule that call we mentioned. At that time, we'll also let you know what the next steps might be.

Thanks so much for applying to serve with [Site Name] and help people in need find what they need!

Have a great day, and we look forward to hearing your story!"

Settings
Subscription
Referrals
Support

Admin Review Add Stage

End of Application

This is a good opportunity to welcome new volunteers and share any context for the rest of the application.

Text Description *

Normal | B | I | U | O | A | S | L | R | E | T | X

For now, this is all that's needed.

Expect to hear from one of our team members to schedule that call we mentioned. At that time, we'll also let you know what the next steps might be.

Thanks so much for applying to serve with CityServeX and help people in need find what they need!

Have a great day, and we look forward to hearing your story!

Total characters: 400/10000 Visible: 339 Formatting: 61

Save as Draft Preview Application Settings Publish

4.7.10 Admin Review (Admin Review)

- Publish the application (keep the volunteer's status if the application was already published).





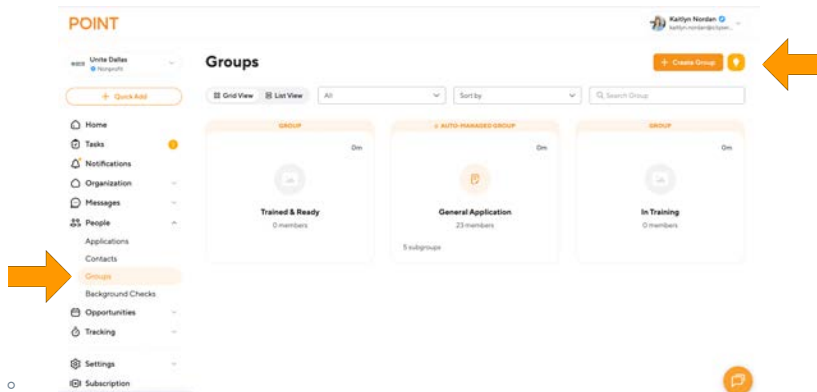
4.8 Configure Groups

Policy: The Resource Coordination opportunity must have volunteer "groups" established before the set up procedure is completed.

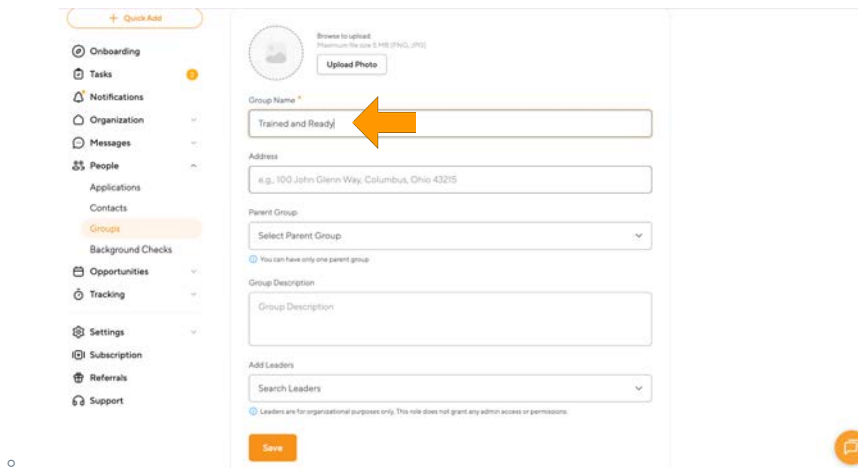
Procedure: Set up the groups according to the following instructions.

Create Volunteer Groups:

- Navigate to People → Groups → Create Group



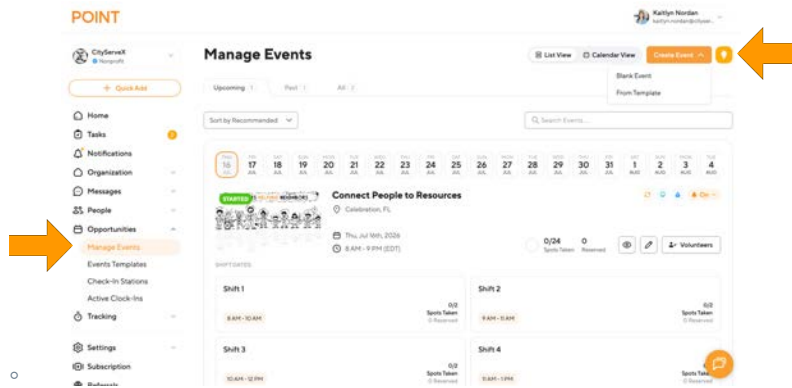
- Create the following groups: "Trained and Ready" and "In Training."





4.9 Configure the Resource Coordination Opportunity

- Navigate to Opportunities → Manage Events → Create Event → Blank Event



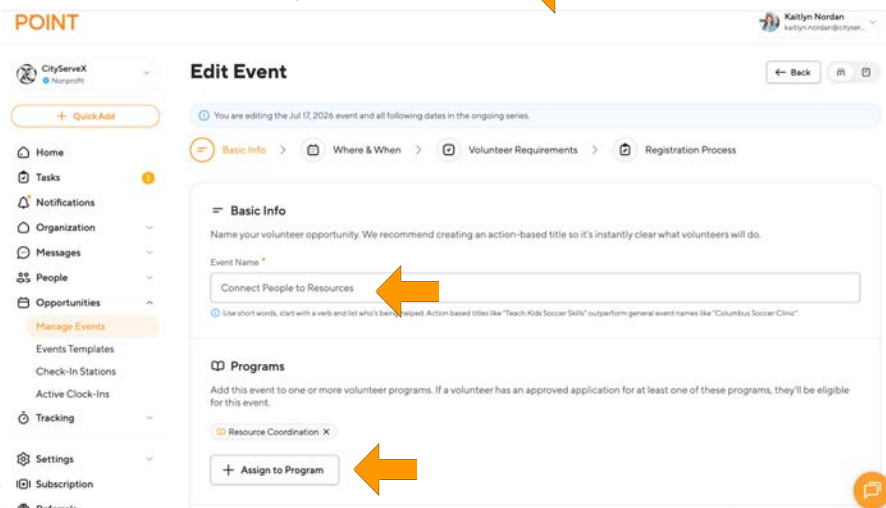
Basic Info

Policy: The Resource Coordination opportunity must be assigned to the Resource Coordination program and reflect the site's Care Champion as host before it is published.

Procedure: Complete the sections mentioned below according to the directions provided.

Basic Info:

- Event Name:** "Connect People to Resources."





- **Programs:** Select "Assign to Program" → "Resource Coordination."
- **Causes:** Select the options shown below.

Hosts:

- **Who is the contact for this event?** (Site Care Champion's Name)
- **What is their contact email?** (Site Care Champion's Email)
- **What is their contact number?** (Site Care Champion's Phone #)

Photo:

- Add: ["Neighbors Helping Neighbors" image](#).



4.10 Complete the Event "About" Section

Policy: The About section must clearly communicate the purpose, expectations, and requirements of the Resource Coordinator role to prospective volunteers before the event is published.

Procedure:

What should volunteers know about the event? Why is it important? What's the impact?

Humanity is experiencing a strange paradox — we are more digitally connected than ever, yet lonelier than ever before.

Now imagine you're in the middle of a crisis. You're stressed, overwhelmed, maybe isolated. You need help finding your way forward — but you don't know where to turn.

Must people navigate that hard road alone? We don't think so.

We believe in the power of community. We believe that neighbors helping neighbors can be one of the most powerful forces in turning the tide of someone's difficult journey. It starts with something simple: connecting people to resources. The good neighbors who provide that service? We call them Resource Coordinators.

Resource Coordinators help people in need find what they're looking for — through software searches, community connections, and good old-fashioned human care. They listen well. They care deeply. They offer ideas, open doors, provide encouragement, and give hope.

And maybe — just maybe — this is your moment to be that person for someone else. To serve as a guide. To help someone in need find their way forward.

What will volunteers do?

Resource Coordinators serve a minimum of 2 hours a week, consistently.

They connect with people in need through phone calls, virtual meetings, and in-person conversations — all on a private, dedicated number. Each conversation is a discovery process: listening with empathy, thinking creatively, and working to find the right resources for each unique situation.

Your tools? A powerful digital platform, a supportive community team, and a passionate, local leader who is invested in your success.

You won't serve in isolation. Training is provided, and ongoing support surrounds you every step of the way.





- Virtual Event URL: <https://cityservexteam.findhelp.com>

Instructions on how to participate virtually or at home:

"Once you are an approved volunteer, your team leader, a Care Champion, will instruct you through a series of trainings. These trainings will equip you to serve virtually.

After you are trained and ready to serve, follow the steps below to begin your shift each time.

Use the link below to navigate to the Resource Coordination Platform:

<https://cityservexteam.findhelp.com>

Event is shown to users in _____: change this to the site's location (confirm the correct time zone is listed after the change)."

Required: Check the box for "Hide Virtual Event URL and instructions from volunteers until registration is approved."

When:

- Select today's date to start. Set up 12 shifts via "Add Shift."
- Start with an 8 a.m.–10 a.m. shift, and for each subsequent hour create a new two-hour shift, until 12 total two-hour shifts run through 7 p.m.–9 p.m.



- Set each shift to 2 spots.

When
Choose a time for your event. We recommend 2-hour events, or breaking your event into shifts.

Start Date Start Time End Time
Month / Day / Year

☐ This event ends on a different day

Have a long day planned? Create shifts.

Shift 1	☐ Fri, Jul 17th, 2026	8 AM - 10 AM (EDT)	2h	2 Spots	✎
Shift 2	☐ Fri, Jul 17th, 2026	9 AM - 11 AM (EDT)	2h	2 Spots	✎
Shift 3	☐ Fri, Jul 17th, 2026	10 AM - 12 PM (EDT)	2h	2 Spots	✎
Shift 4	☐ Fri, Jul 17th, 2026	11 AM - 1 PM (EDT)	2h	2 Spots	✎
Shift 5	☐ Fri, Jul 17th, 2026	12 PM - 2 PM (EDT)	2h	2 Spots	✎
Shift 6	☐ Fri, Jul 17th, 2026	1 PM - 3 PM (EDT)	2h	2 Spots	✎
Shift 7	☐ Fri, Jul 17th, 2026	2 PM - 4 PM (EDT)	2h	2 Spots	✎
Shift 8	☐ Fri, Jul 17th, 2026	3 PM - 5 PM (EDT)	2h	2 Spots	✎
Shift 9	☐ Fri, Jul 17th, 2026	4 PM - 6 PM (EDT)	2h	2 Spots	✎
Shift 10	☐ Fri, Jul 17th, 2026	5 PM - 7 PM (EDT)	2h	2 Spots	✎
Shift 11	☐ Fri, Jul 17th, 2026	6 PM - 8 PM (EDT)	2h	2 Spots	✎
Shift 12	☐ Fri, Jul 17th, 2026	7 PM - 9 PM (EDT)	2h	2 Spots	✎

Repeat Settings:

- Select "Repeat daily".
- Select "Until the end date" and select of one year out from the start day





[+ Add Shift](#)

Sum of shifts duration: 1d

How many people can come?

Spots *

24

The total number of event spots included spots from the relevant shifts.

[Repeat Settings](#)

This event will repeat: daily until May 31, 2027

Add more events to the Ongoing Event Series

Events to Add

0

Until the end date of *

06/01/2027

Month / Day / Year

[Extend](#) OR [Select Dates on Calendar](#)

[Preview](#)

[Back](#) [Next](#)

[overlapping](#) [Blog](#)

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4.11 Set Volunteer Requirements

Policy: Volunteer eligibility settings must align with CityServeX's standard minimum requirements. Background check requirements are determined at the site level.

Procedure:

- **Who can see this event?** Select "Public."

Home Tasks Notifications Organization Messages People Opportunities **Manage Events** Events Templates Check-In Stations Active Clock-Ins Tracking Settings Subscription Referrals Support

Basic Info > Where & When > **Volunteer Requirements** > Registration Process

Who can see this event?
Select who should be able to view your event. [Read more about event privacy.](#)

☒ **Public**
A public event means that anyone in the general public/on POINT will have access to view and signup for your event. Public events are a great way to recruit new faces to your organization since they are available to everyone to view.

☐ **Public, Unlisted (Secret Link)**
This event will be available to any volunteers with whom you (or others) have shared the link. This event will not show on a website widget nor will be appear in any searches.

☐ **Private**
By selecting this, only people who have joined your organization on POINT will see your event.
☐ Private for all volunteers with Private Access
☐ Private for specific group(s) with Private Access

RESTRICTIONS ON SIGNUP

Age Restriction
Volunteers that create or claim POINT accounts need to confirm that they are 13 years and older.

- **Age Restrictions:** Select "minimum age requirement" and select "18."

Age Restriction
Volunteers that create or claim POINT accounts need to confirm that they are 13 years and older.

☐ **No restriction**
All ages can register for this event.

☒ **Minimum age requirement**
There is an age restriction for this event. Volunteers without a birthday saved will be asked to confirm they meet the minimum age.
What is the minimum age requirement?
18

Gender Restriction

☒ **No restriction**
All genders can volunteer for this event.

☐ **Specific genders**
There are specific gender restrictions for this event, select the gender(s) below.
☐ Female ☐ Male ☐ Non-Binary



- **Gender Restrictions:** Select "No Restriction."

Gender Restriction

☒ **No restriction**
All genders can volunteer for this event.

☐ **Specific genders**
There are specific gender restrictions for this event, select the gender(s) below.
☐ Female ☐ Male ☐ Non-Binary

Application Status Requirement
If a volunteer has completed the application for any of the associated programs, they'll be eligible.

☒ **Resource Coordination**
If they are not yet eligible, which application should be required?
General

Background Check Requirement
Set the type of background checks needed for volunteers to serve at your event.

- **Application Status Requirement:** Select "General" if not already selected.
- **Background Check Requirement:** Leave this section blank — it is determined by the site.

ADDITIONAL REQUIREMENTS

Background Check Requirement
Set the type of background checks needed for volunteers to serve at your event.
Require volunteers to complete a background check on registration? No ☐ Yes ☐
Connect your POINT account to Checkr in order to seamlessly run background checks within POINT. [Connect](#)

Volunteer Questions
The volunteer questions will be displayed when a volunteer signs up for an event.
Select Questions OR + Create New Custom Field
You can also add and modify questions in the [Form Fields](#) Section.
Only new signups will be shown the new Volunteer Questions.

Waiver
A volunteer waiver protects a service provider, like your nonprofit, from liability in the event of an accident involving any of your volunteers.
Require volunteers to agree to a waiver for registration? No ☐ Yes ☐

- **Volunteer Questions:** Leave blank.
- **Waiver:** Leave off.





4.12 Configure the Registration Process

Policy: Registration settings must support self-scheduling and recurring sign-ups so approved volunteers can commit to consistent, weekly shifts.

Procedure:

- **Registration Deadlines:** Keep toggled to "No"

Registration Deadlines
Want to restrict volunteers from registering for a volunteer opportunity before a specific date.
Set a registration cutoff and cancellation preference. No ☒ Yes

Default Registration Status
Select the status volunteers would be assigned on registration.

☒ **Signed-Up**
Once the volunteer has completed the registration process, the volunteer will be fully-signed up.
Note: All events requiring a background check will be set to Pending as a default. However, if the volunteer's background check status is Clear, their registration will automatically update to Signed-up.

☐ **Pending**
Once the volunteer has completed the registration process, the volunteer will be assigned a "Pending" Status. An administrator must manually transition volunteers to the "Signed-up" status as an approval step to complete the registration.

Ongoing Commitments and Self Scheduling
For ongoing events, you have the option to allow or require volunteers to sign up for multiple events at once.
Allow volunteers to sign up for multiple events at once? No ☒ Yes

- **Default Registration Status:** Select "Signed Up" if not chosen beforehand.
- **Ongoing Commitments and Self Scheduling:** Select "Allow volunteers to sign up for multiple events at once" → "Recommend that volunteers register for several events" → "Yes, suggest a schedule" → "same shift weekly" under "Frequency."

Ongoing Commitments and Self Scheduling
For ongoing events, you have the option to allow or require volunteers to sign up for multiple events at once.
Allow volunteers to sign up for multiple events at once? No ☒ Yes

☒ **Recommend that volunteers register for several events**
We will suggest that volunteers sign up for multiple events at the same time, but they can still just choose one.

Would you like to suggest a specific schedule?
☐ No, any date and shift is fine
☒ Yes, suggest a schedule

Self Schedule Suggestion
When a volunteer chooses a shift, we'll recommend they sign up for the same shift on other days according to the frequency below.

Frequency
Same shift weekly

☐ **Require an ongoing commitment**
Volunteers must sign up for more than one event at once. This option is best for volunteer roles or set schedules.
Minimum number of events a volunteer must sign up for in the event series
2
Based on your settings, there are 359 events in this series.

Must volunteers commit to events on a specific schedule?
☒ No, any date and shift is fine

- **Guest Registration:** Keep toggled to "No"
- **Publish**



4.13 Configure Site General Settings

Policy: Each site will need its general settings configured. While Care Champions can later change these settings, the template provided should be utilized for setting the template of the site.

Procedure:

- Navigate to Settings → General
 - Organization Privacy: Select Open
 - Choose and Default Recruitment Tool: Use my public POINT page
 - Stats Configuration: insert "36.14" → Update
 - Check In and Hours Approval
 - Event Check in Settings: Manual Check-in
 - Volunteer Hours Self-Submission: Auto-Approval

Your Site Is Ready

Once every step above is complete — the organization profile is filled in, the Resource Coordination program and form fields are created, the application is published, the volunteer groups exist, and the Resource Coordination event is published with its full shift schedule — your site is ready for Care Champion and volunteer use.

Every field you fill in and every stage you configure represents a real person on the other end: a volunteer ready to serve, or a neighbor waiting to be connected to help. Follow this guide in order, and return to any section as needed to keep the site running well.

