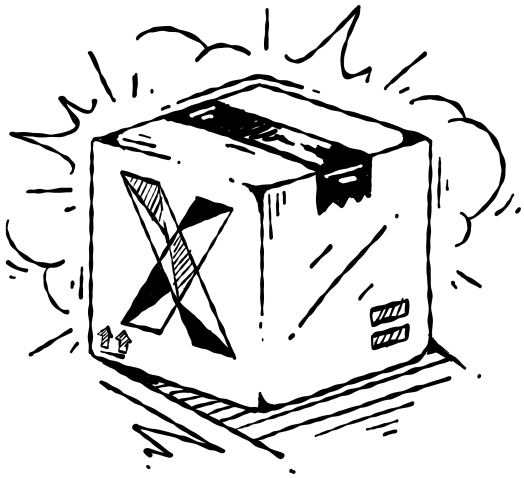


CityServeX

Care Champion Policy & Procedure: Volunteer Hours and Monthly Impact Reporting in POINT

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4.0 Purpose and scope

Every month, each Care Champion pulls two things out of POINT and sends them in by the 5th business day: a volunteer hours CSV and a POINT Impact Report PDF. Together they tell the story of who showed up, how long they served, and what it added up to.

Every hour is a gift. Someone chose to show up for a neighbor instead of doing something else with their Saturday. Keeping an honest record of those hours honors that choice, and it gives our funders, board, and partners proof that the story is real.

This P&P combines the CSXU *Volunteer Hours Reporting* and *Monthly Impact Reporting* policies, plus the earlier POINT Volunteer & Hours Lookup Policy, into one guide. It covers:

- Looking up volunteers and their hours in POINT
- The monthly site hours CSV
- Individual hours reports for volunteers who ask
- The monthly, quarterly, and annual Impact Reports
- Naming, storing, and protecting what you export

4.1 Who does what

This applies to every Care Champion with POINT admin access for their site, church, or group. No admin access yet? Ask your CityServeX site lead before your first report is due.

Role	Responsibility
Care Champion	Resolves pending hours, exports the monthly hours CSV and Impact Report, sends individual hours reports on request, runs the pre-send check, saves and submits on time
Site Lead	Grants Care Champions POINT admin access; covers approvals and reports when a Care Champion is away
CityServeX National Office	Receives and reviews reports, follows up on missing or unusual numbers, combines sites for funders, board, and grants
Volunteer	Logs their hours, and tells their Care Champion if something looks wrong

- Pull POINT data only for a CityServeX purpose: reporting, recognition, follow-up, or grant and partner updates.

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- Don't share your login. If someone needs a report, pull it for them or ask your site lead to give them access.

4.2 Policy

Both monthly reports are due by the **5th business day** of the following month, and they cover the full previous calendar month, the 1st through the last day.

Keeping hours accurate

- CityServeX runs on an honor system, so most hours arrive already approved. Before month's end, still check for anything **Pending** and approve or resolve it. Only approved hours appear in reports.
- Approve only what you can confirm. If you're unsure, ask the volunteer or the event host first.
- Fix mistakes in POINT, never in the file. Correct the record, then export again. Never edit a CSV or PDF by hand.

Some volunteers rely on a staff member to log hours for them. Any admin has the ability to manually add hours for volunteers.

What's due, and when

Report	Format	Due
Site hours, last month	CSV	5th business day, monthly
Impact Report, last month	PDF	5th business day, monthly
Impact Report, last quarter	PDF	Jan, Apr, Jul, Oct, with the monthly
Impact Report, last year	PDF	January, with the monthly
One volunteer's hours	PDF	Within 5 business days of their request

Keep every report. POINT keeps no history of Stats exports. The shared drive copy is the only record, so never skip the save step.

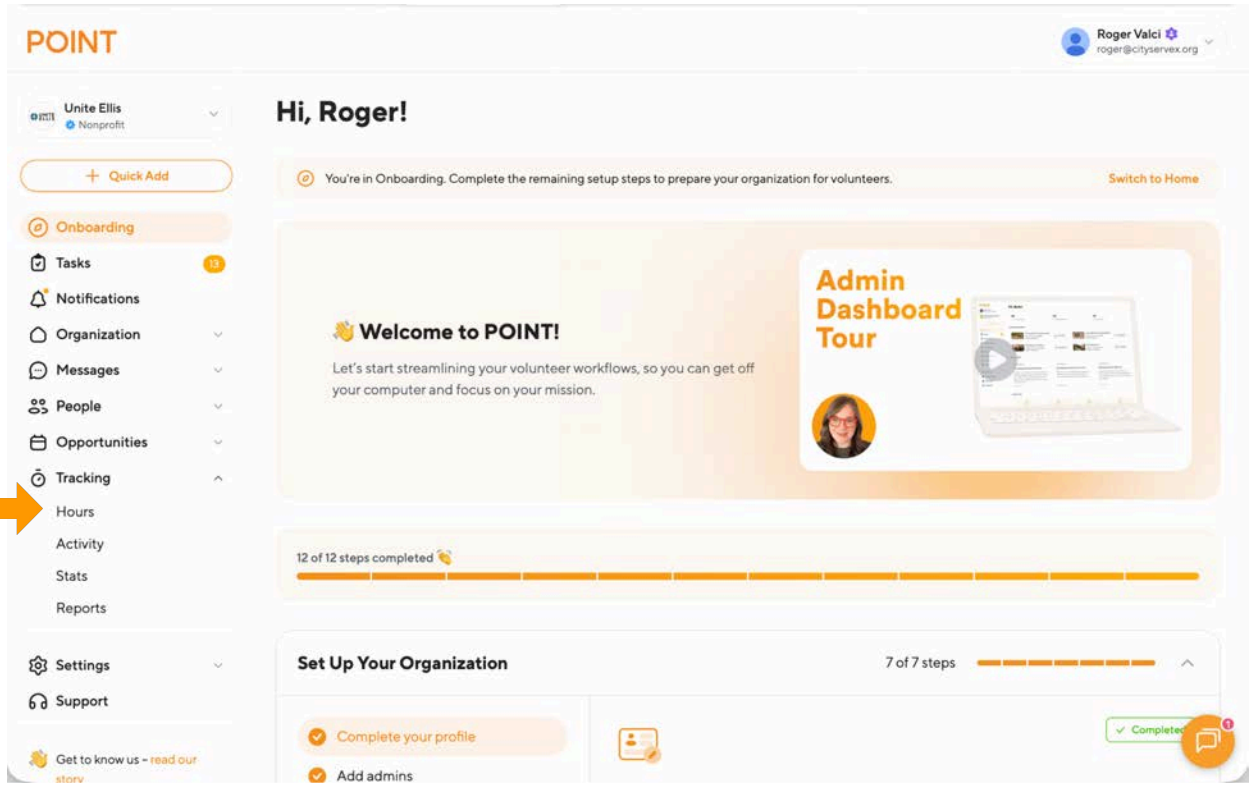
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4.3 Procedure 1: Looking up volunteers and hours

Use **Tracking → Hours** for your site's monthly report and **People → Contacts** for one person. Don't use the dashboard's Top Volunteers box for counts; it shows only 5 people.

A. Monthly site hours CSV

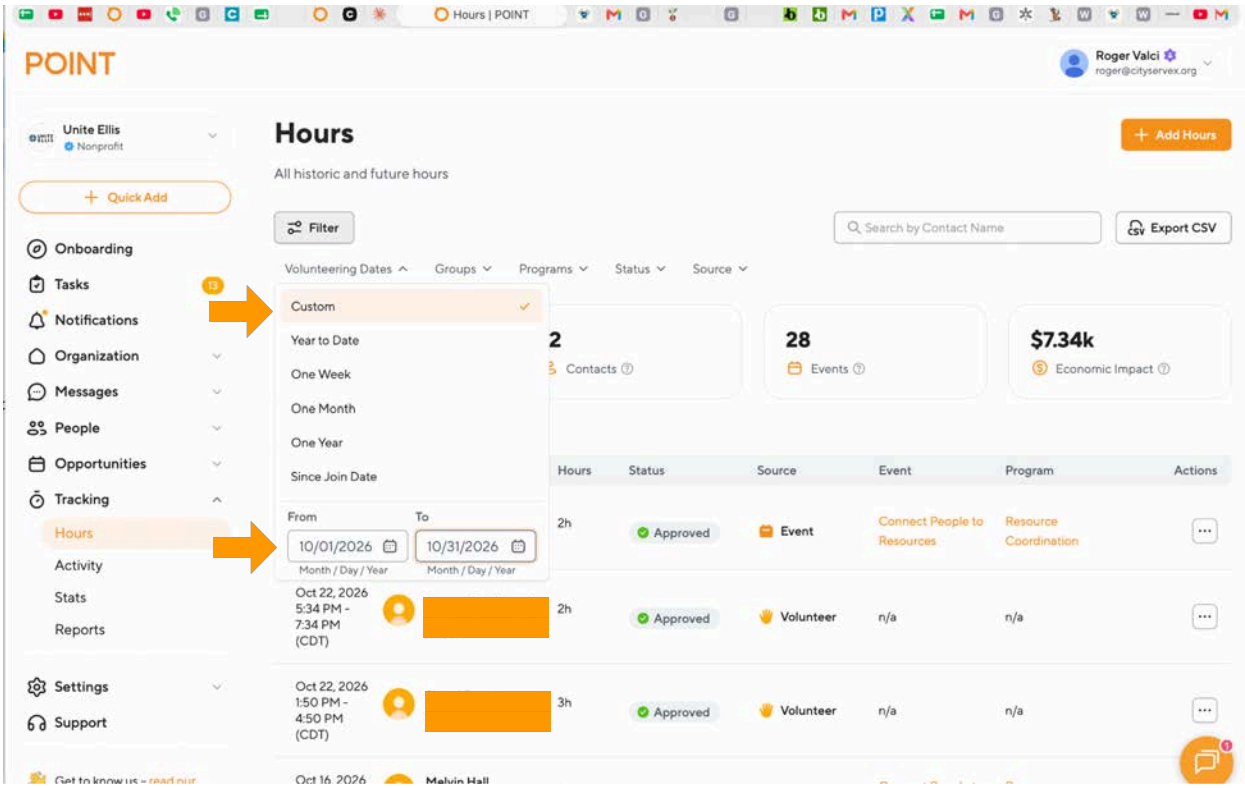
1. Log in to the POINT admin dashboard. Under **Tracking**, select **Hours**.



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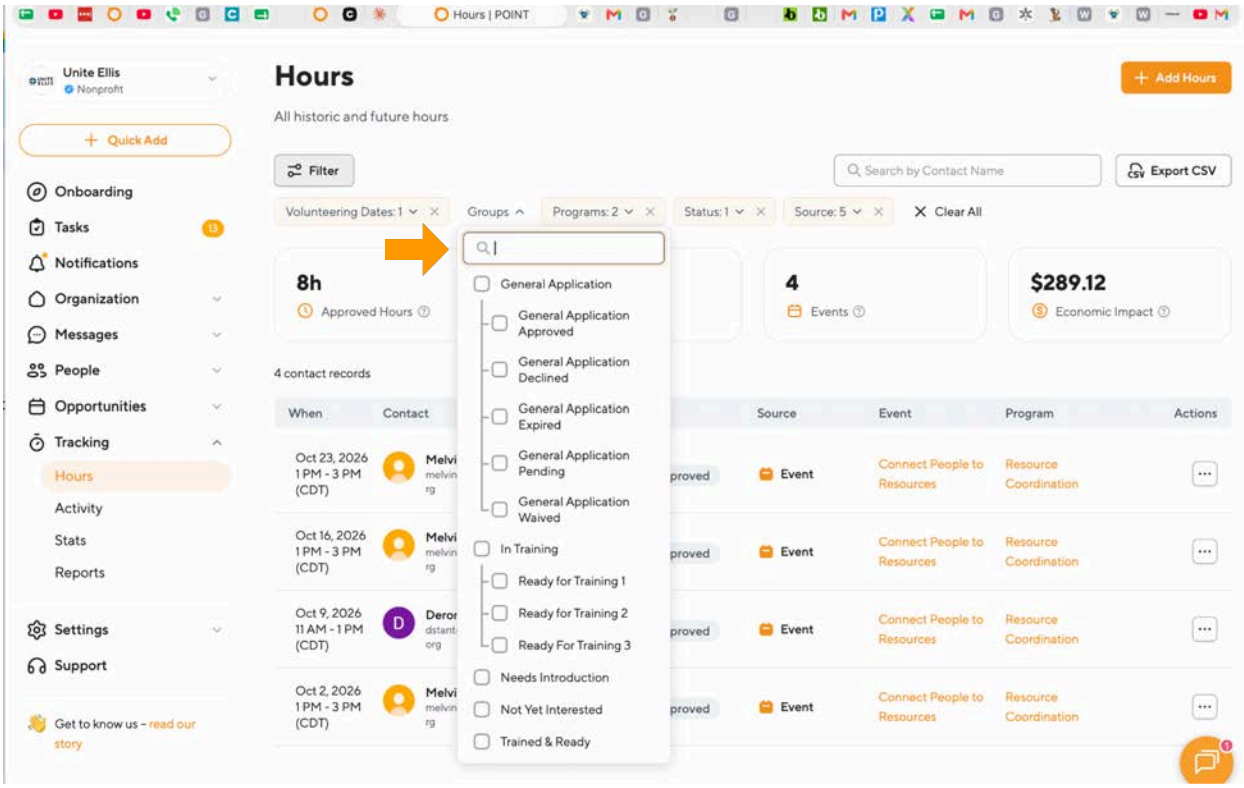
2. Click **Filter** and set:

   - **Volunteering Dates:** Go to Custom and choose the 1st through the last day of last month. This example is for October.



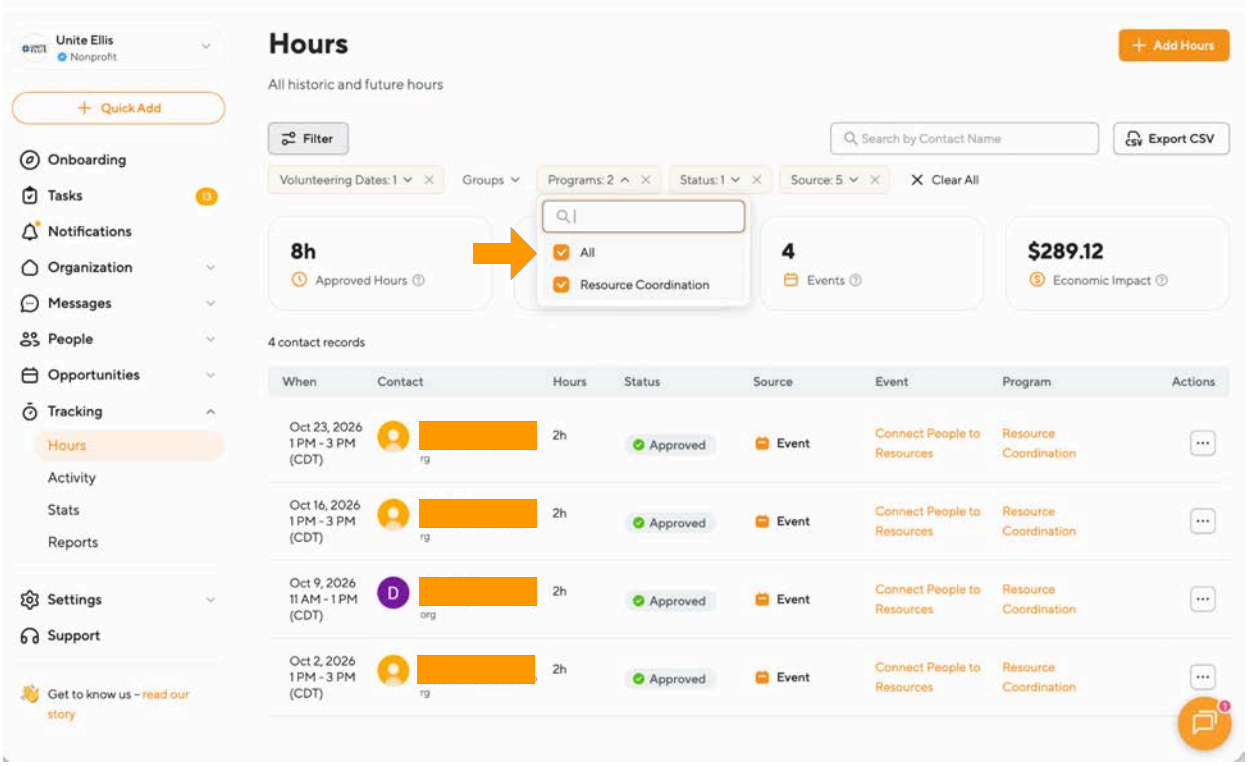
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3. **Belongs to Groups:** Select nothing.



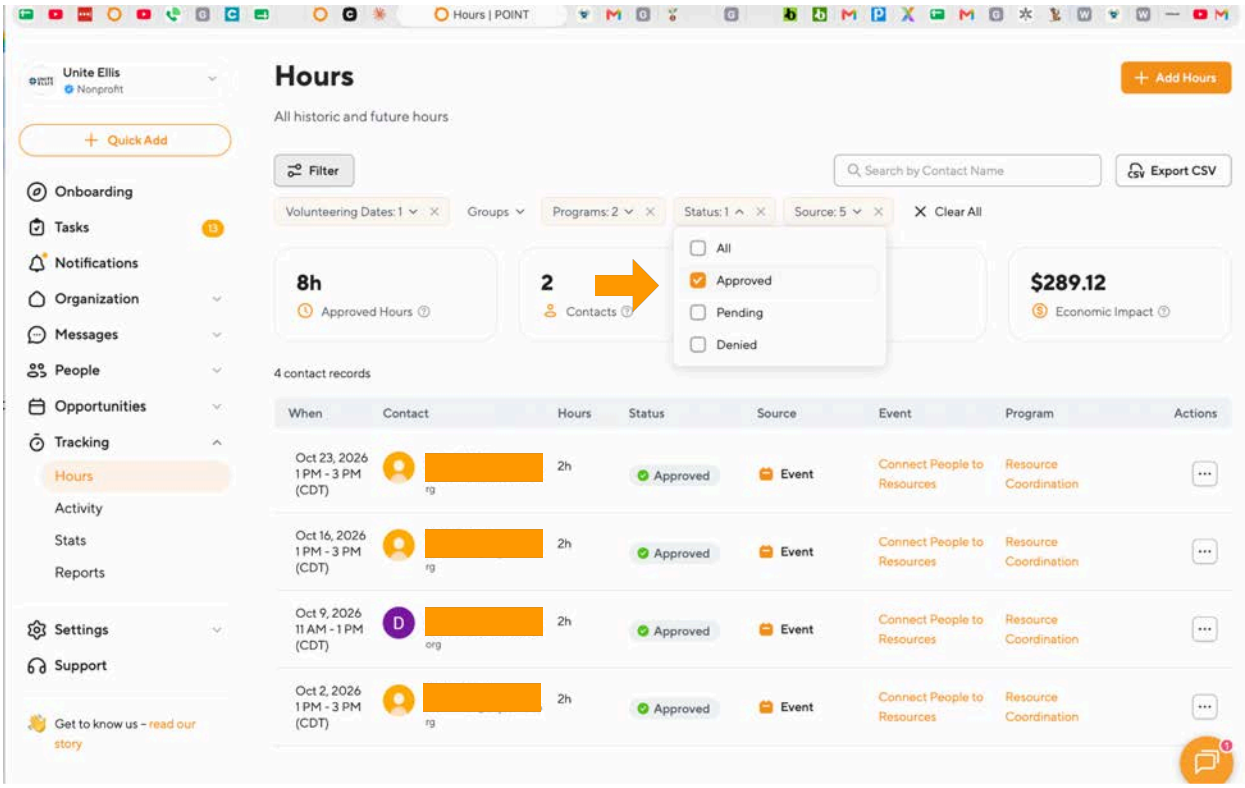
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4. **Programs 2:** Select All



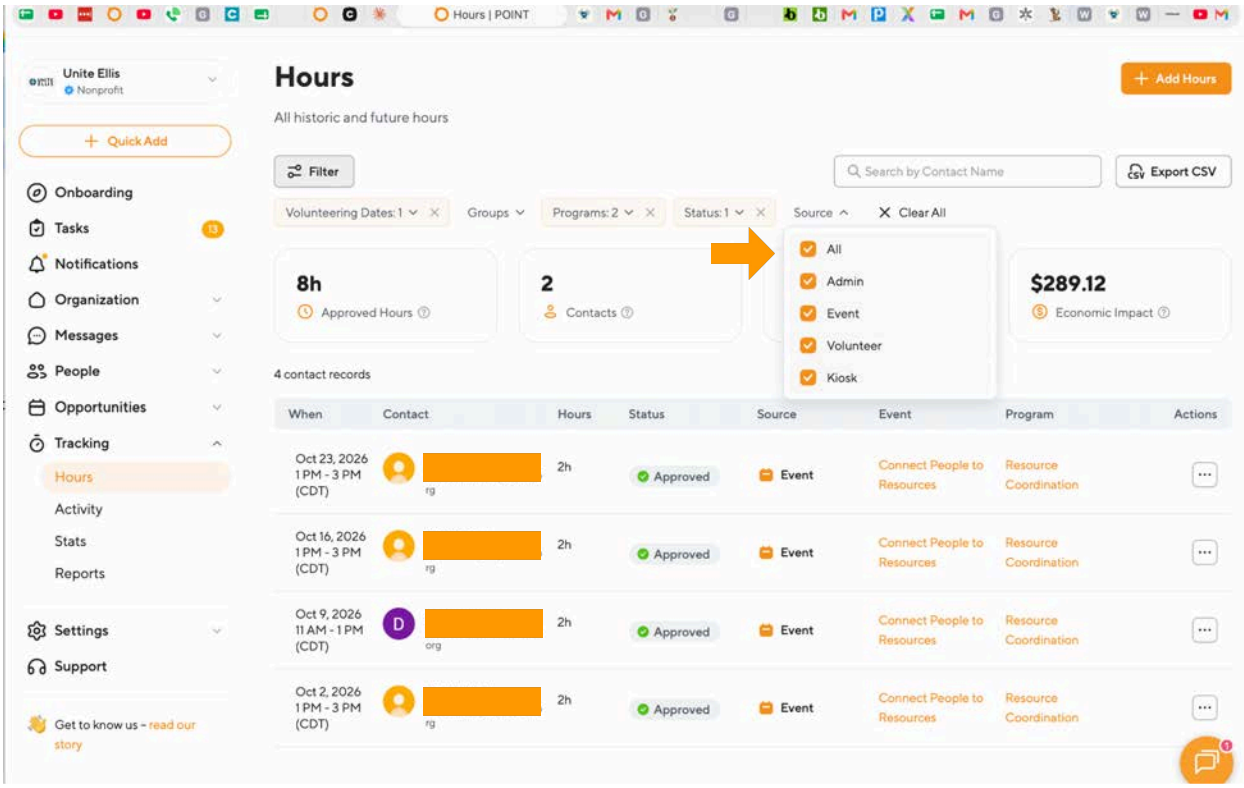
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5. **Statuses:** Approved



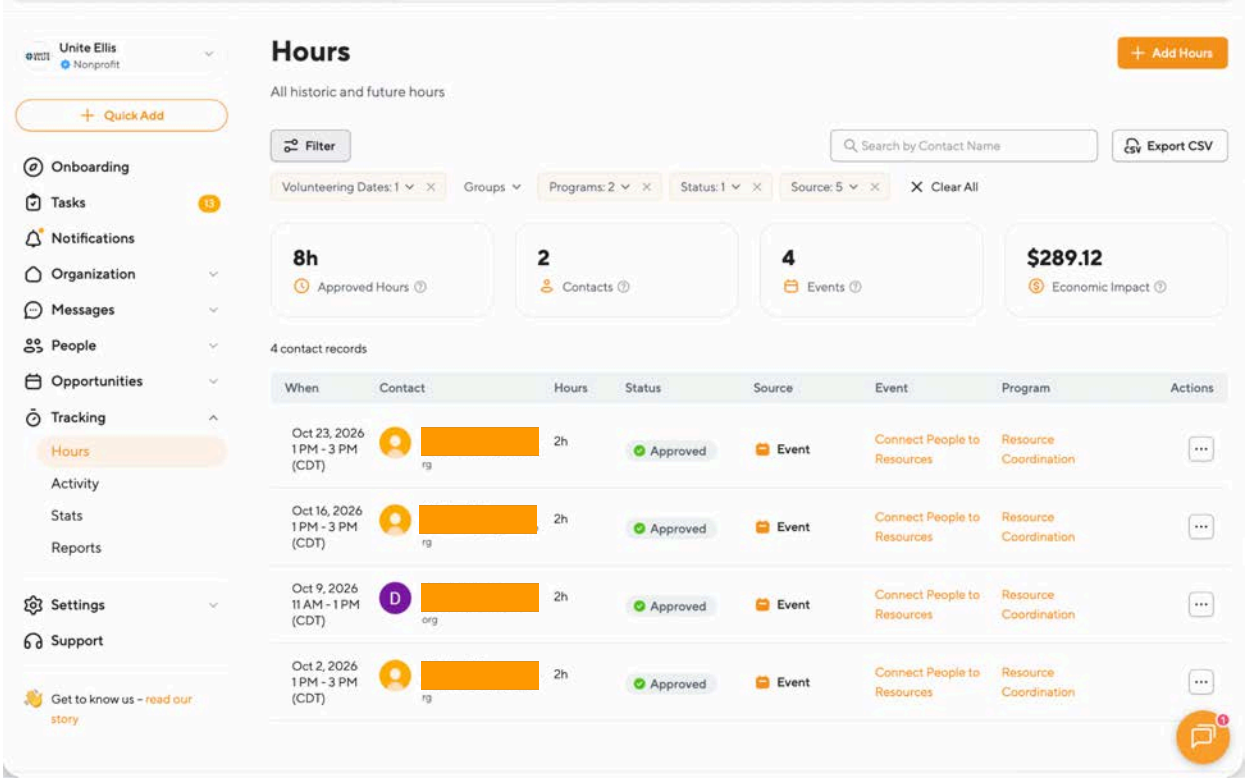
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6. **Sources**: Select all



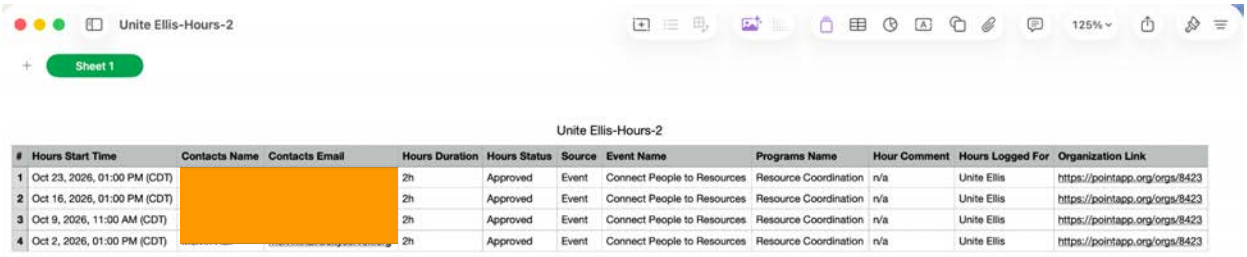
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7. Click **Apply Filters** and look over the list. The export includes only what's on screen.
8. Click **Export CSV** (top right).



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9. The CSV document will look something like this.



Unite Ellis-Hours-2

#	Hours Start Time	Contacts Name	Contacts Email	Hours Duration	Hours Status	Source	Event Name	Programs Name	Hour Comment	Hours Logged For	Organization Link
1	Oct 23, 2026, 01:00 PM (CDT)	[redacted]		2h	Approved	Event	Connect People to Resources	Resource Coordination	n/a	Unite Ellis	https://pointapp.org/orgs/8423
2	Oct 16, 2026, 01:00 PM (CDT)			2h	Approved	Event	Connect People to Resources	Resource Coordination	n/a	Unite Ellis	https://pointapp.org/orgs/8423
3	Oct 9, 2026, 11:00 AM (CDT)			2h	Approved	Event	Connect People to Resources	Resource Coordination	n/a	Unite Ellis	https://pointapp.org/orgs/8423
4	Oct 2, 2026, 01:00 PM (CDT)			2h	Approved	Event	Connect People to Resources	Resource Coordination	n/a	Unite Ellis	https://pointapp.org/orgs/8423

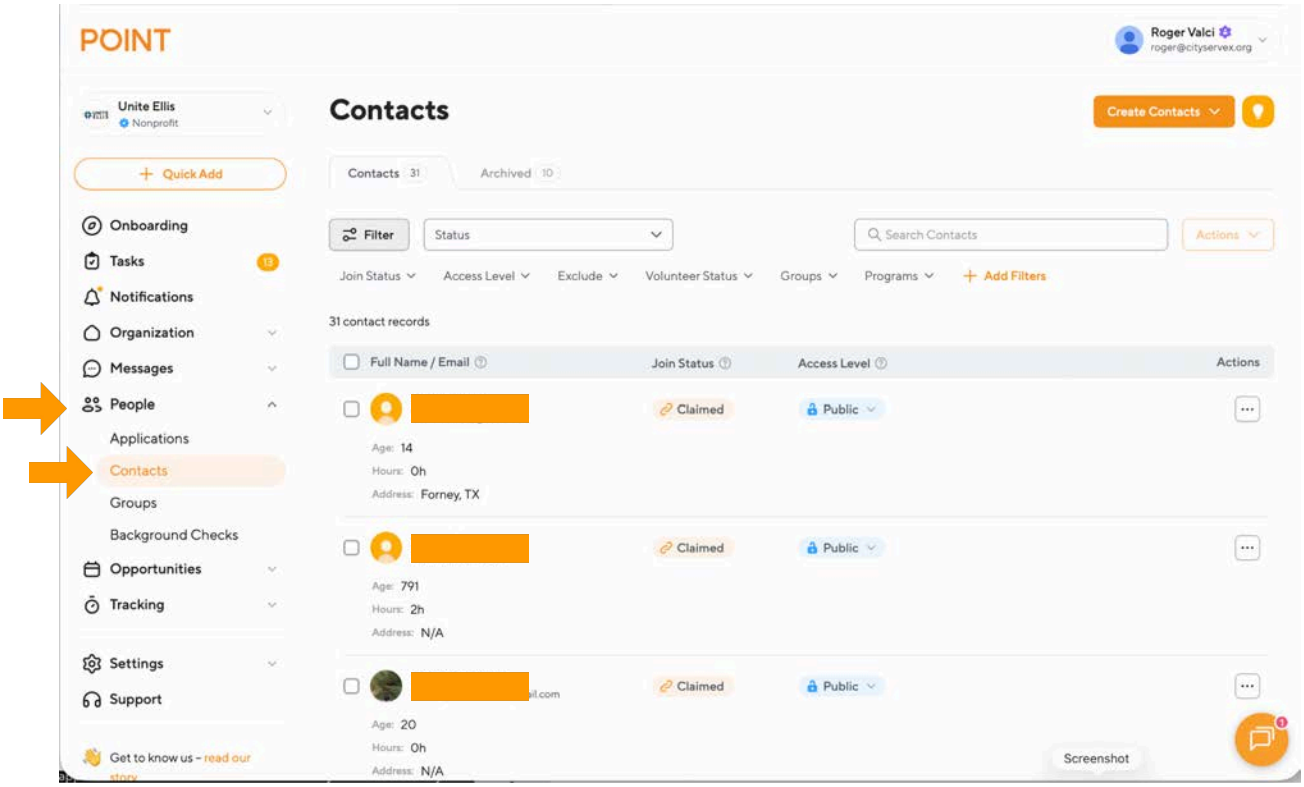
10. Rename it (see naming below), upload it to your site folder, tell the National Office, then delete the Downloads copy.

Filters stay on until you click **Reset**. Reset before any export that should include everything.

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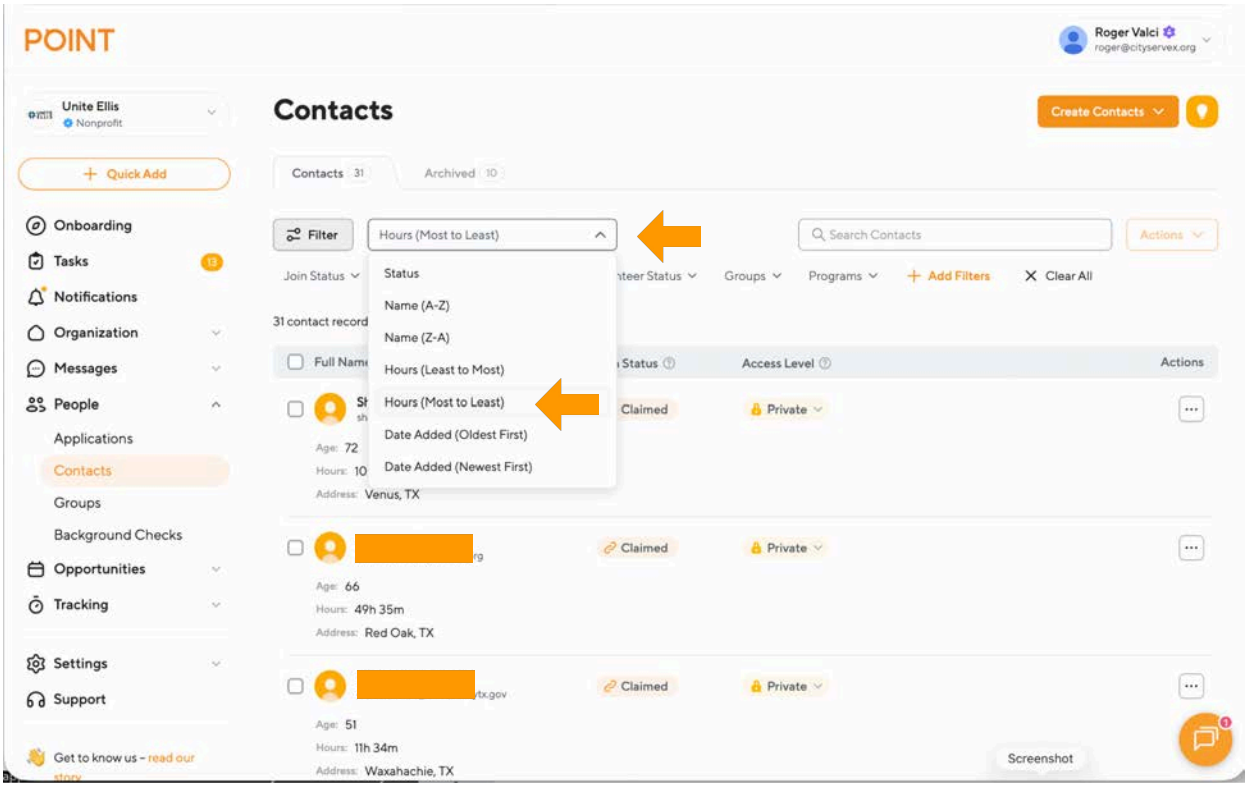
B. One volunteer's hours (when they ask for proof)

1. Go to **People → Contacts** and click the volunteer's name.



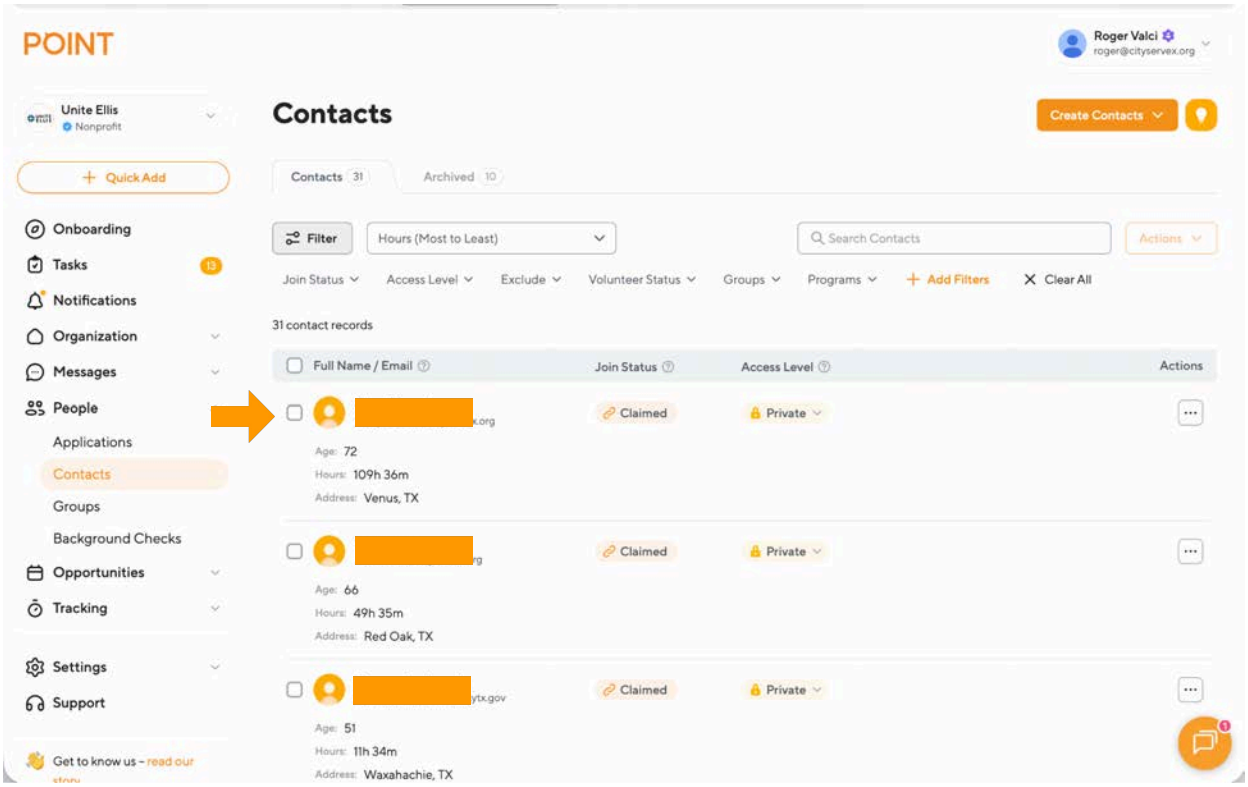
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2. Go to **Filters** and choose **Hours (Most to Least)**



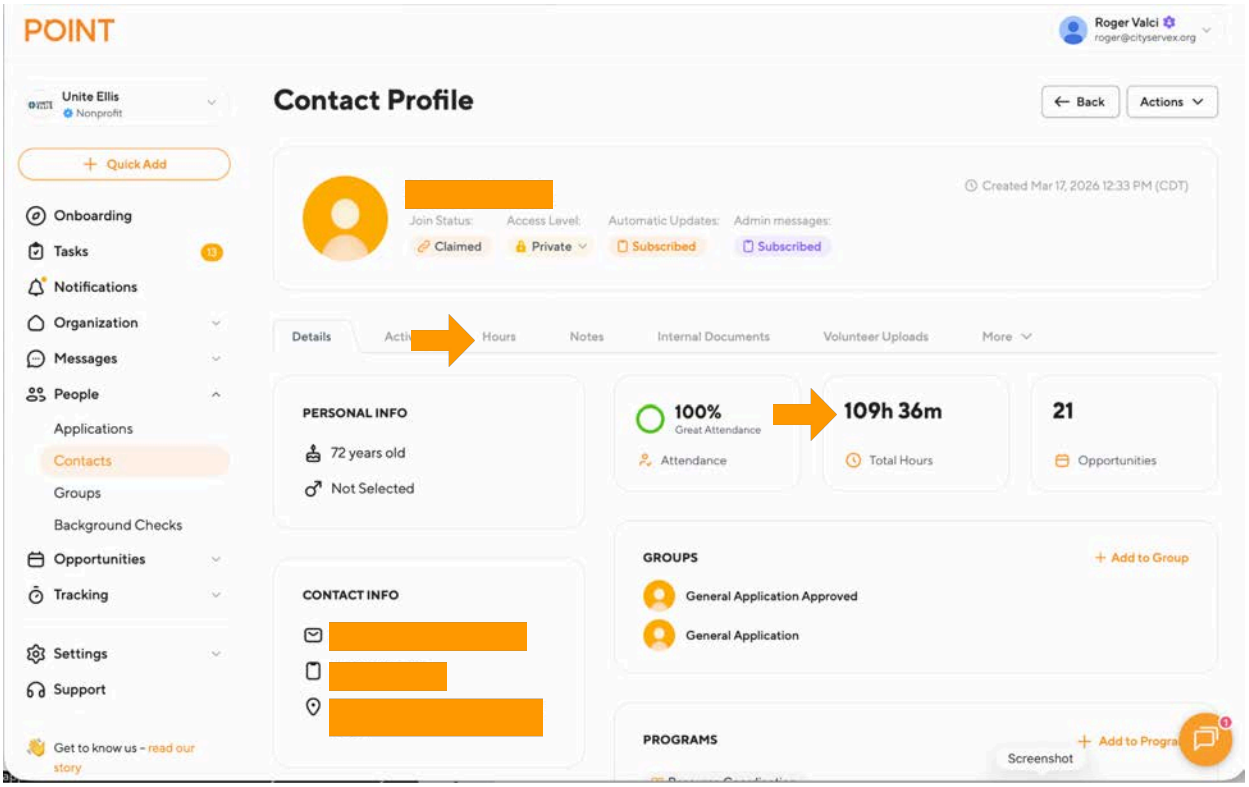
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3. **Select the Volunteer** whose Hours you want to see. You may have to scroll down. **Double-click on that person you whose Hours you want to see.**



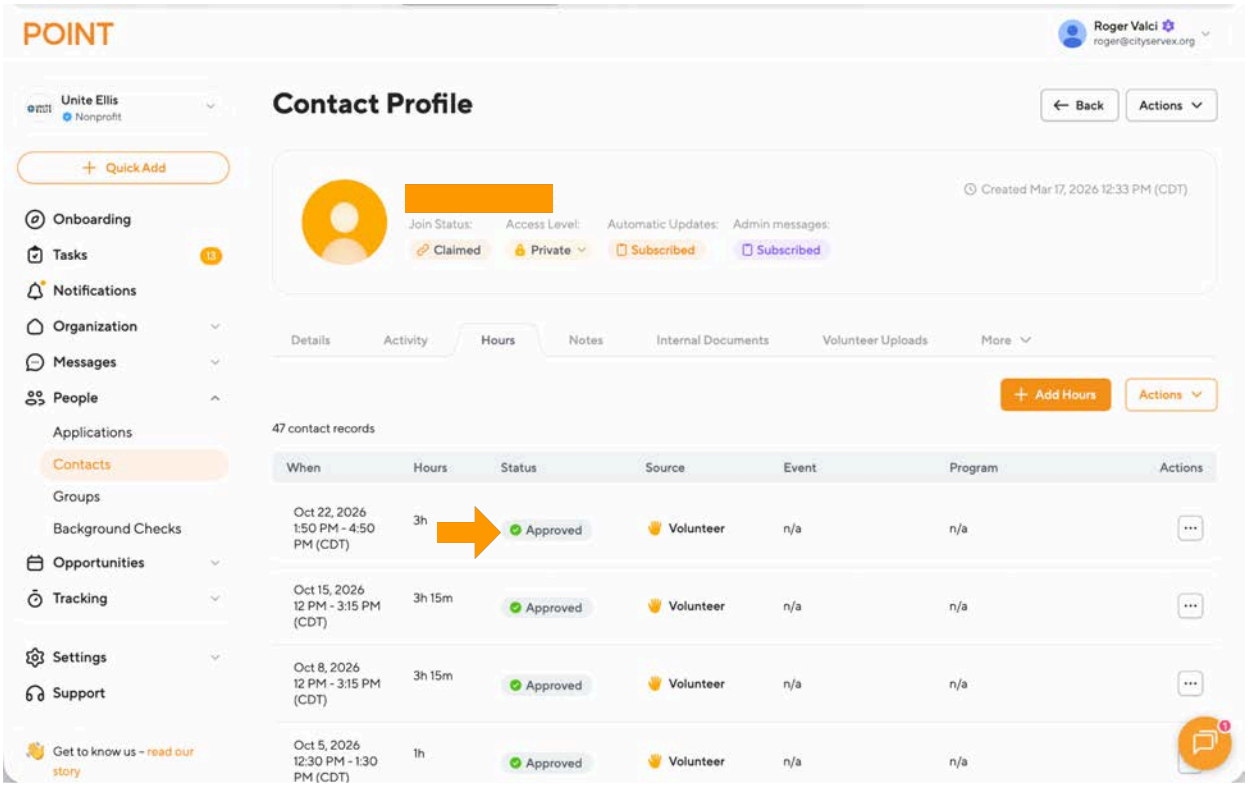
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4. Open the **Hours** tab. Take note of the **Total Hours** and **Opportunities** information.



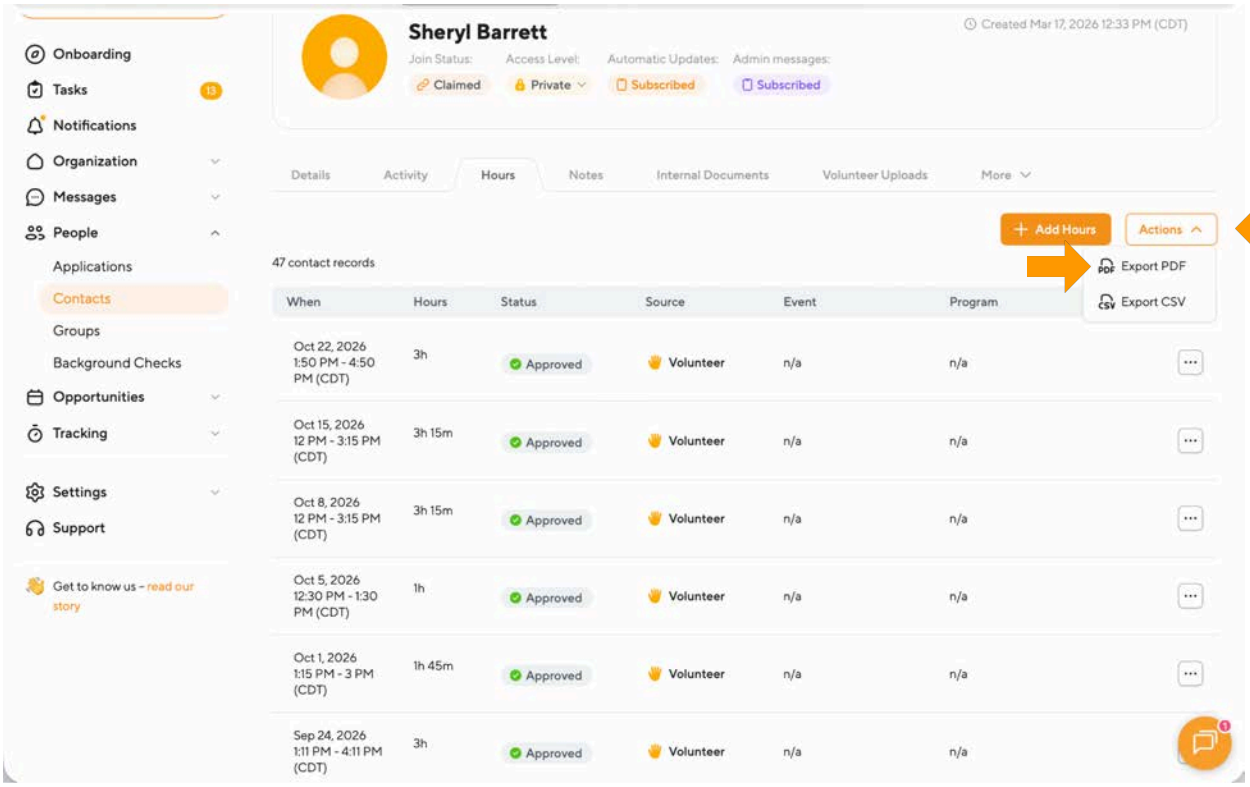
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5. Make sure their hours are **Approved**.



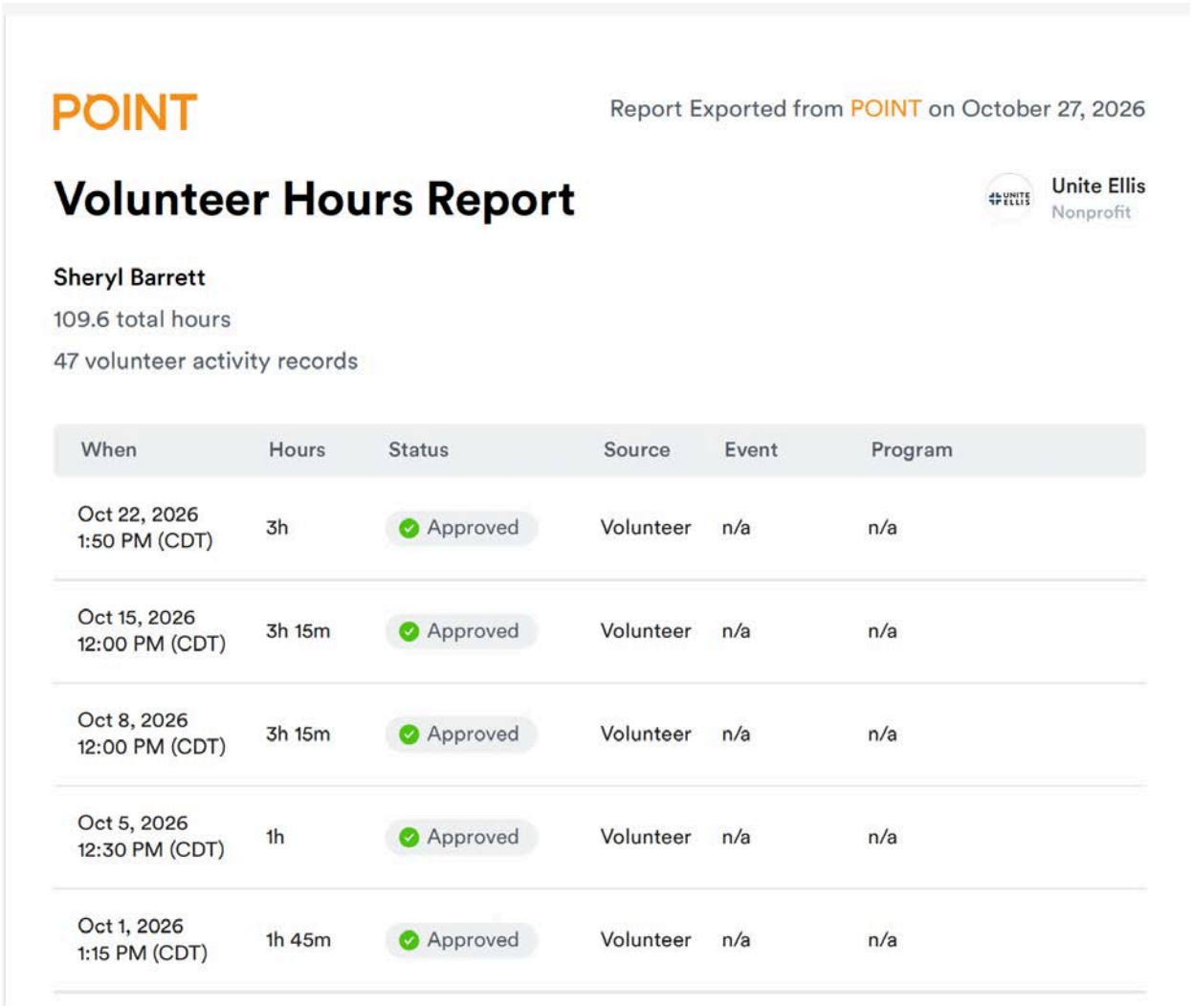
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6. Click **Actions → Export PDF** (or Export CSV for a spreadsheet).



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7. The PDF will look something like this.



POINT

Report Exported from POINT on October 27, 2026

Volunteer Hours Report

Unite Ellis
Nonprofit

Sheryl Barrett

109.6 total hours

47 volunteer activity records

When	Hours	Status	Source	Event	Program
Oct 22, 2026 1:50 PM (CDT)	3h	Approved	Volunteer	n/a	n/a
Oct 15, 2026 12:00 PM (CDT)	3h 15m	Approved	Volunteer	n/a	n/a
Oct 8, 2026 12:00 PM (CDT)	3h 15m	Approved	Volunteer	n/a	n/a
Oct 5, 2026 12:30 PM (CDT)	1h	Approved	Volunteer	n/a	n/a
Oct 1, 2026 1:15 PM (CDT)	1h 45m	Approved	Volunteer	n/a	n/a

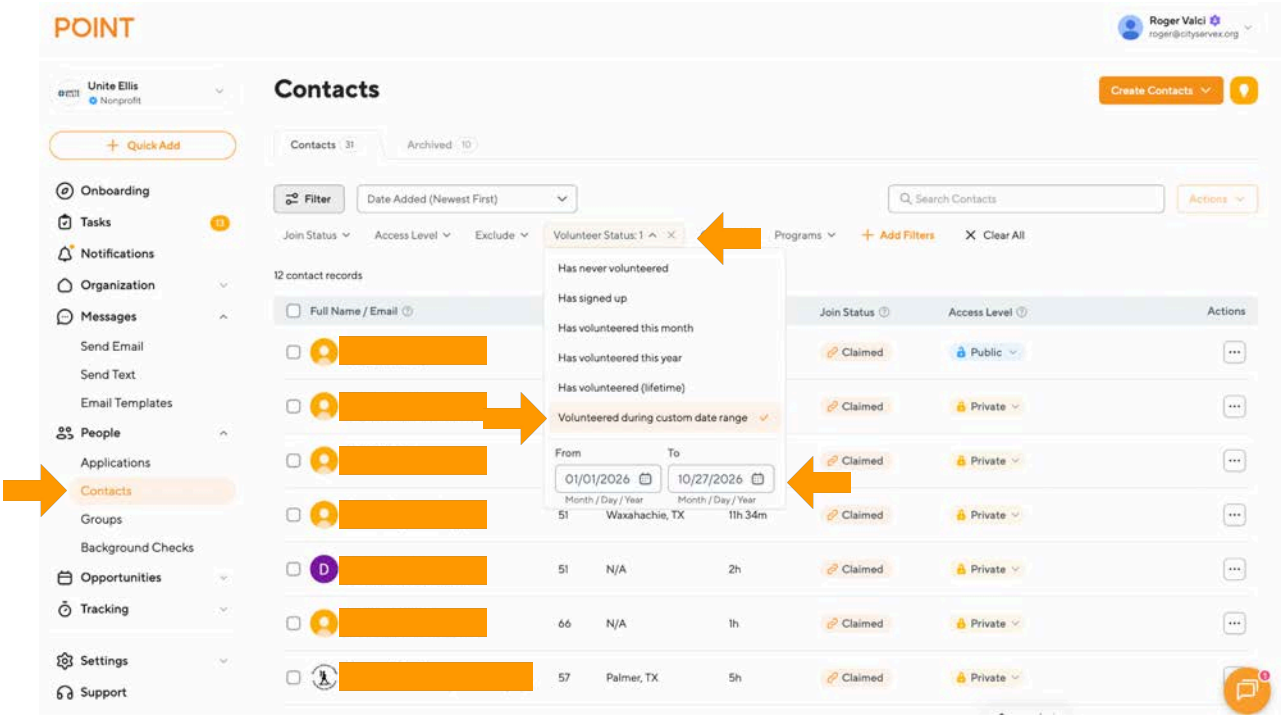
8. Save a copy to your site's "**Individual Hours Reports**" subfolder, then send the PDF to the volunteer.

Send it to the volunteer only, not their school or employer, unless they ask you to in writing. This view has no filters, so it always shows full history. For one date range, use A with **Search by Contact Name** and **Volunteering Dates**.

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C. Finding a list of volunteers

Go to **People → Contacts** and filter by **Volunteer Status**, for example "has volunteered this year." Choose the dates desired. In this example we did January 1, 2026 to October 27, 2026. When you report a count, note the filter you used.



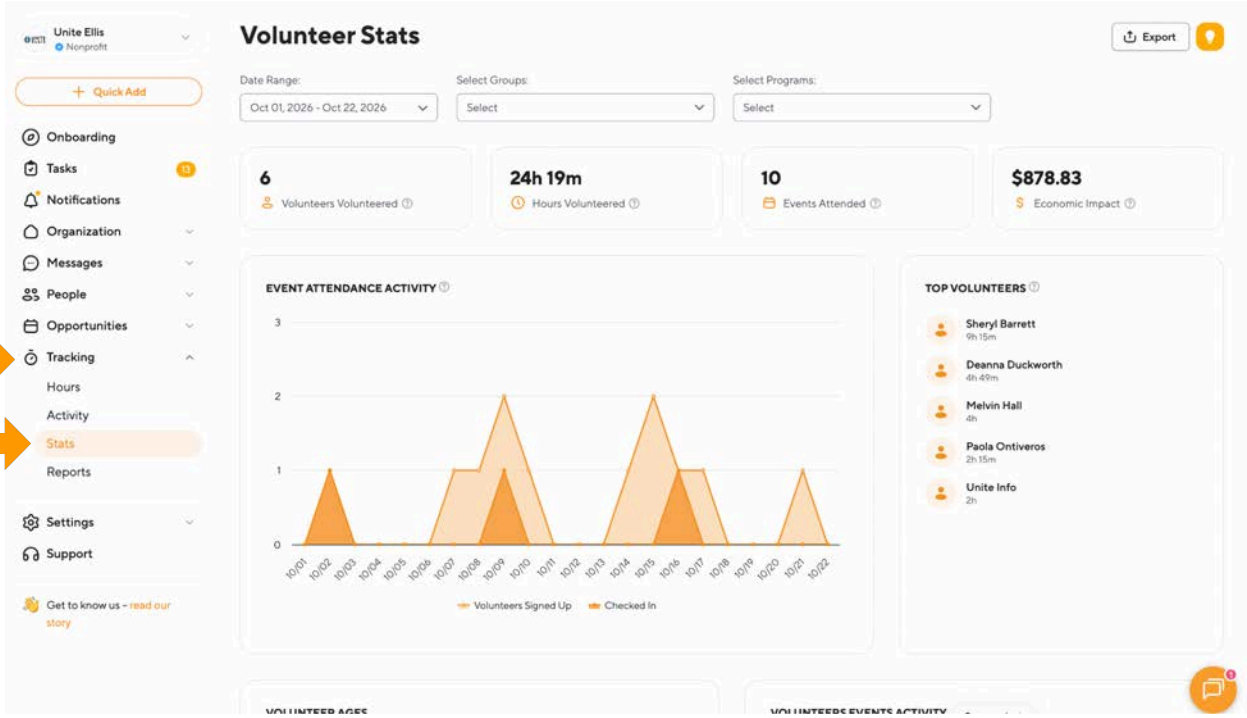
What's in the hours CSV: one row per hours record, with Hours Start Time, Contact Name, Contact Email, Hours Duration, Hours Status, Source (Admin, Event, Volunteer, or Kiosk), Event Name, Programs Name, and Hour Comment.

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4.4 Procedure 2: Monthly Impact Report

The Impact Report is a PDF of POINT's **Stats** page. It takes about five minutes once you've done it a time or two. Set the filters first: the PDF shows only what's on screen.

1. Log in to the POINT admin dashboard. Click **Tracking → Stats**.

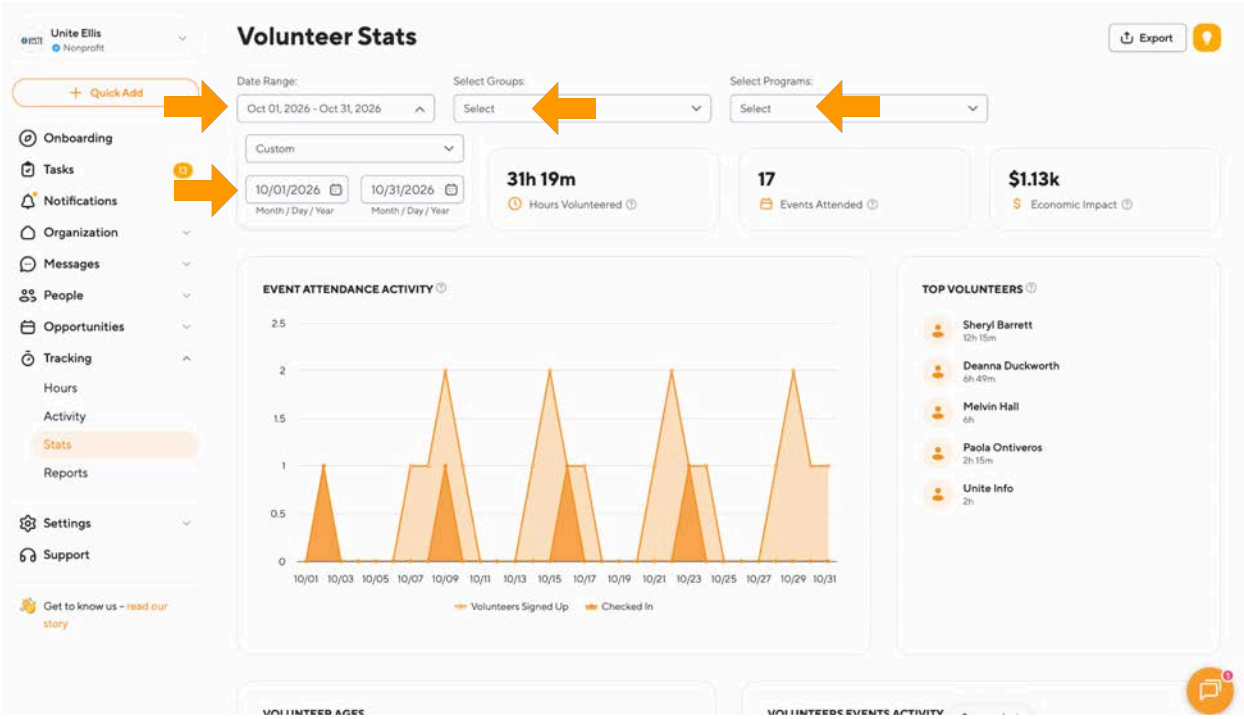


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2. Set **Date Range** to the 1st through the last day of last month. For a quarterly or annual report, use the full quarter or year.

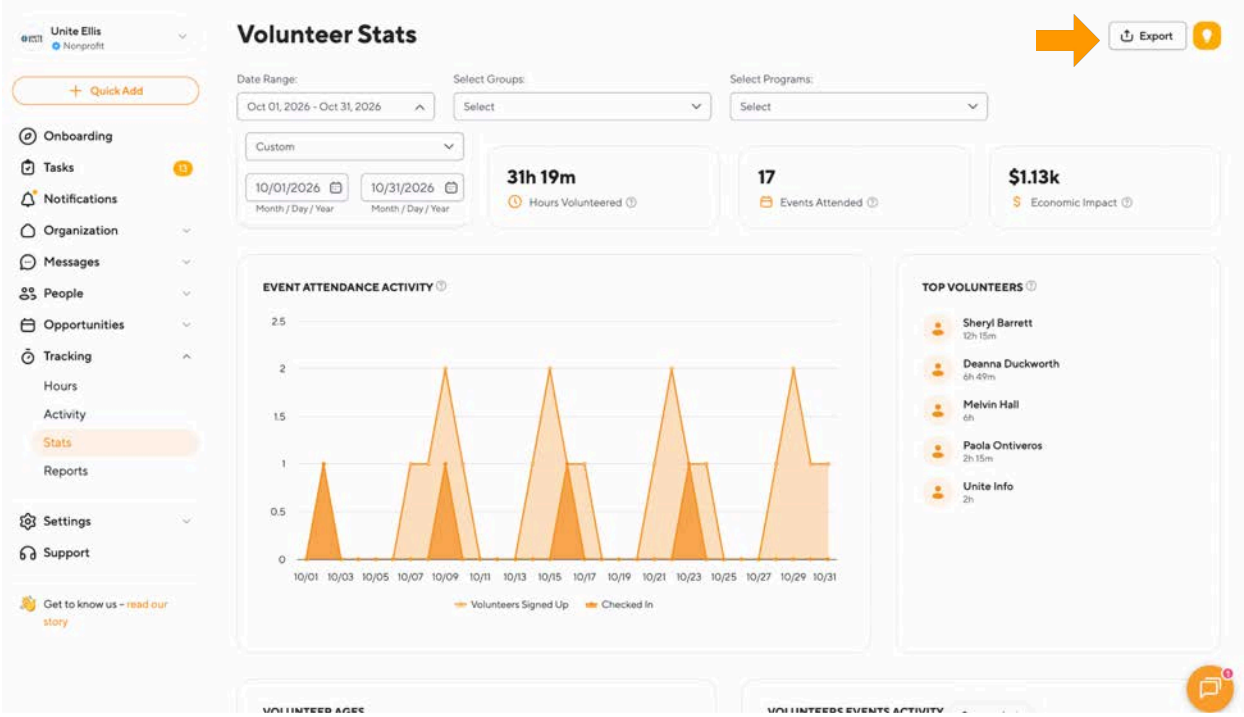
   Leave **Select Groups** and **Select Programs** blank, as the current Monthly Impact policy directs. (Select Programs appears only on the Pro plan.) See Open items: the source policy conflicts on this step.

   Look over the numbers. What you see is what gets sent.



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3. Click **Export** (top right). The PDF downloads as *POINT Impact Report*.



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4. Rename it, upload it to your site folder, and let the National Office know.

In January, April, July, and October, repeat steps 2–6 for the full previous quarter. In January, also run one for the full previous year.

4.5 What's in the report

Section	What it shows
Header	Organization name, logo, and date range
Totals	Volunteers Volunteered, Hours Volunteered, Events Attended, Economic Impact
Event Attendance Activity	Sign-ups compared with check-ins over time
Top Volunteers	Most active volunteers, by name, with hours
Volunteer Ages	Age spread of your volunteers
Volunteer Events Activity	Active Volunteers, Event Attendance, Event Hosts
Supported Causes	Causes your volunteers served

POINT's Stats count volunteers checked in at events. Hours logged outside events may not appear here, so the Impact Report and the hours CSV can differ.

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4.6 Naming, storage, and privacy

Every file goes in your site's folder in the CityServeX shared drive, named the same way at every site.

Report	Format	Example
Monthly hours	City_Site_POINT-Hours_YYYY-MM	Orlando_UniteEllis_POINT-Hours_2026-10.csv
Monthly impact	City_Site_POINT-Impact_YYYY-MM	Orlando_UniteEllis_POINT-Impact_2026-10.pdf
Quarterly impact	City_Site_POINT-Impact_YYYY-Q#	Orlando_UniteEllis_POINT-Impact_2026-Q4.pdf
Annual impact	City_Site_POINT-Impact_YYYY	Orlando_UniteEllis_POINT-Impact_2026.pdf
One volunteer	City_Site_Hours_LastName-FirstName_YYYY-MM-DD	Orlando_UniteEllis_Hours_Smith-Jordan_2026-10-21.pdf

Individual hours PDFs go in an "Individual Hours Reports" subfolder, dated the day you exported them.

Protecting our volunteers

These files carry names, emails, and hours of people who trusted us. Treat them that way.

- **Hours CSV:** share only with CityServeX staff and your site leadership.
- **Impact Report:** share with CityServeX staff, site leadership, and funders or partners the National Office has approved.
- Give a volunteer only their own hours report, never anyone else's.
- Never post reports or email addresses publicly or forward them outside CityServeX. Check with the National Office first if someone outside that circle needs one.
- Ask a volunteer before celebrating them by name in public.
- Keep hour comments factual and kind; volunteers may see them.
- Don't keep the only copy on your computer or in email. Delete downloads once they're in the shared drive.

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4.7 Check before you send, and getting help

A quick look before you submit saves everyone a follow-up email.

- ☐ No pending hours left from last month
- ☐ Dates cover the whole month, 1st through last day
- ☐ Hours CSV filtered to your group and Statuses = Approved
- ☐ Totals look about right for what you saw this month
- ☐ Both files named correctly and saved in your site folder
- ☐ National Office notified

If something looks off, fix it in POINT and export again.

Problem	What to do
Can't get into POINT admin	Ask your site lead
Export button does nothing	Allow pop-ups for POINT or try another browser; ask another admin to pull it meanwhile
Questions about this policy or a report	CityServeX National Office
POINT itself is broken (login, missing buttons, wrong data)	support@pointapp.org

POINT's own guides, with short videos, are on support.pointapp.org: "How to Export Volunteer Stats as a PDF," "How can I export a volunteer's hours report as an admin?", and, for volunteers printing their own hours, How can a volunteer print their hours?

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