>fgApplication

VOLUNTEER APPLICATION WORKFLOW PROJECT

FELLOWSHIP GREENVILLE

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⇒ History

Fellowship Greenville has for many years had a screening process for volunteers and workers in nursery, children and students ministries. Over time, our Worship Team also put in place their own process and before we knew it, there were several different ways that volunteers were being screened. With the addition of two more ministries needing screening, we knew it was time.

⇒ Need

Having different ministries within the organization all doing the same thing but doing it quite differently led to confusion and inconsistency. It became very obvious that we had to find a better way for a volunteer to be able to apply for all aspects of serving through one place, not being asked the same thing in three or four different ways. It also made sense to have it in Rock for ease of storage and access for staff.

⇒ Solution

Rock has become central for all aspects of our communication with those associated with the ministry. So it obviously was the solution to use our External Rock Website (www.fellowshipgreenville.org) to capture information and then store this information within the person's profile for ease of access. We gained consensus to merge the application processes into one. All volunteers go to central place online to input the needed information. Leaders gain access to that information through person attributes on the person record.

- Requirements - Ask a lot of questions, take a lot of notes, then map out a draft of the requirements. Before any work begins make sure all persons involved are on board and sign off on the requirements. The result was to have one form that could be used by all, but having different options based on selections so the end result was gathering information based on need.
- Structure - Initially we created a volunteer application workflow as one large workflow. The workflow had numerous workflow and person attributes, activities, and actions. What we learned was that we had created a workflow too large to effectively be edited in the system.

So, continuing to develop the workflow in this manner became an issue. We decided to re-work this project into multiple smaller workflows which call for the next workflow upon submission. The reason that we could be successful in this manner of workflow development was because we use Person Attribute Set action to write the entered attributes to Person Attributes, storing them there.

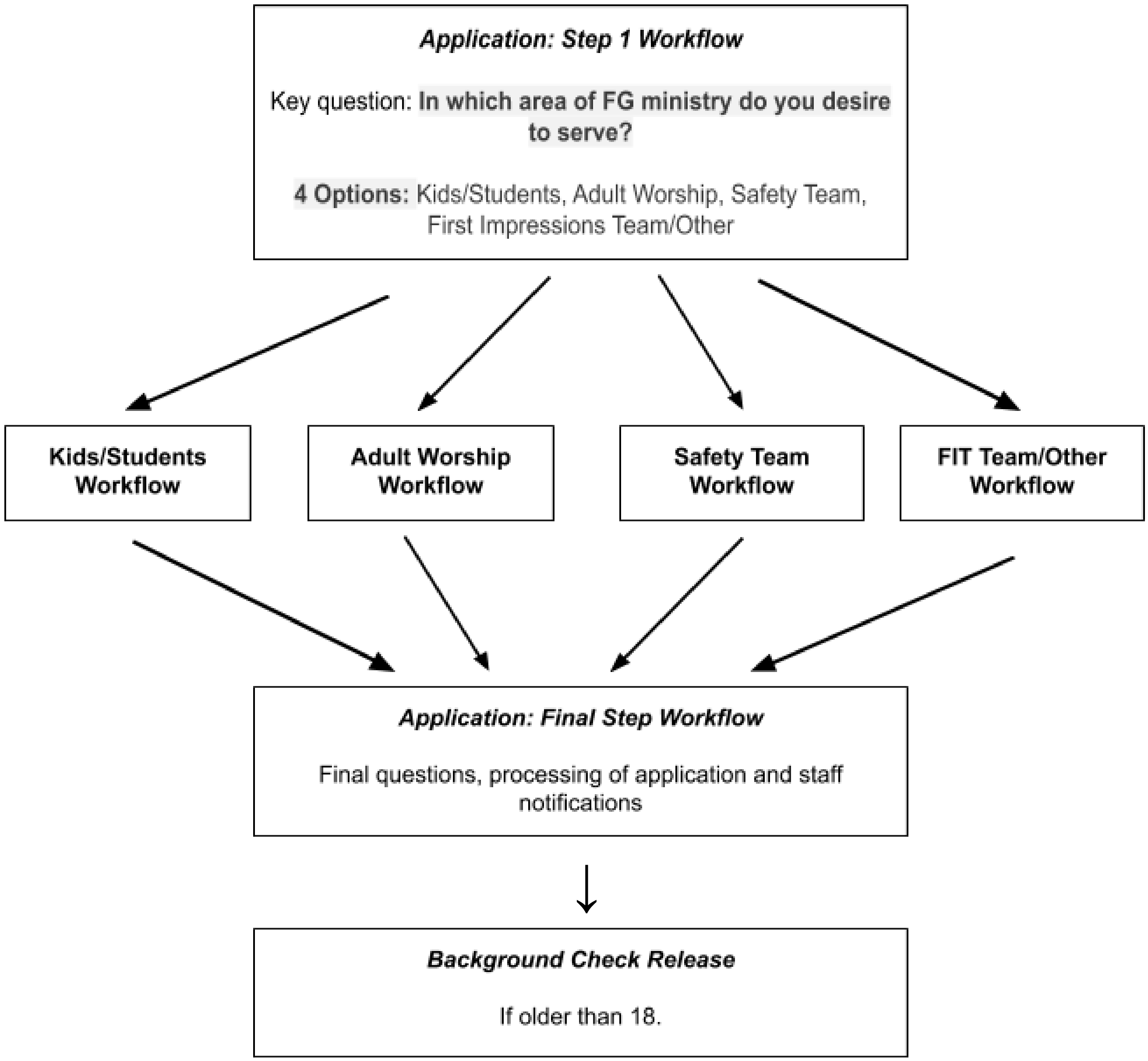
- From the website, user is asked to login to access a volunteer application.
- The user is able to edit the basic demographic information from Rock. Changes there are submitted to staff alerting them of data changes. In that screen, the user enters basic questions needed for all volunteers. The final question asks them to indicate a specific area of ministry.
- Based on the selection from area of service on the previous page, the applicant is given additional form(s) to complete for that area of ministry. Note that at this point, a user may click save for later which stores the information from the fields to the person attributes and then sends a message to the person's email with a link back to that same screen.
- The next screen allows users to add references. For three of the areas, one reference is all that is required. For one area (safety) three references are required. The user then reads the agreement and either agrees or can submit indicating they have questions. It is at this time that the user gets the acknowledgement.
- The final screen for users is the background check. If the applicant is 18 or over, the applicant is directed to either close (there is a current background check on file), or the applicant enters the information and the background check launches.

- Bringing it all together - The storing of the application fields in Person Attributes brings to the table the advantage that the applicant can leave and return to the application process without losing all entered values (as noted previously). This also allows us to not Persist (Save) the workflow as all attributes are writing to Person attributes before being lost.
  - Public Profile Edit block - provides capturing/editing basic person demographic data.
  - Workflow User Entry Form - action provides easy-to-understand web-based forms.
  - Workflow Person Attribute Set action - allows storage of all application feedback in Person Attributes for future access categorized by Area of Service of application.
  - Workflow Send Email allows allows us to send confirmation to applicant and notification to worker.
  - Workflow filters and Redirect to Page action allows movement from one form to the next and on to Background Check Release.
    Workflow email alerts
    - Application Saved for Later - If the user hits save, a message is sent to them with a hyperlink to the same workflow they were in.
    - Application complete - The user gets a system generated message letting them know someone will be in touch.
    - Application received - staff person assigned gets a system generated message stating an application has been received and gives them a link to the person's profile with the Serving Tab showing.
  - View fields based on opportunity - We included the choice of area to serve (based on last submittal). All the person attributes carry from one application to the other so no matter which area the person selects, all the common fields are populated based on

the input. Rights to view results or view the document are controlled through Rock Security.

- Person attributes sample

⇒ Workflow Basics



For detailed screenshots on the workflows used in this application, please visit: https://docs.google.com/document/d/1NTsLUq578aoIr1U_PWz2_REr9KyTAZEV7B_wyTicVOM/edit?usp=sharing