

Associations, Assignments, Slots - Anywhere March 2024

Vocabulary review:

Job Association – this is the loosest connection to what people do. This allows them to show up on rosters and clock hours. If your data did not have explicit time/place schedule information this is how it came over in conversion.

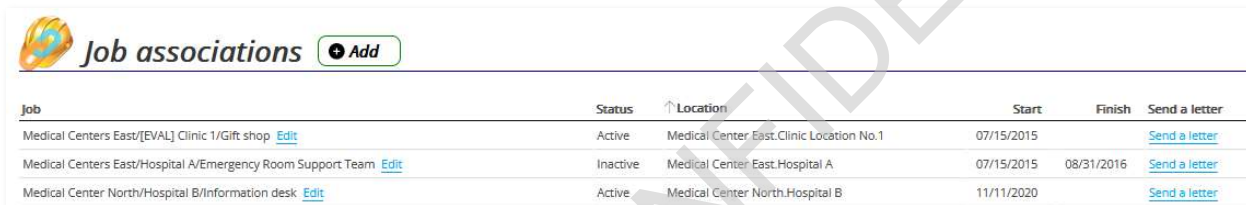
Job Assignment - tells the system when, where, what to expect for these volunteers and can show them on calendars and schedules, and as missing or late.

Recurring assignments – these are your “every week at XYZ indefinitely” volunteers.

Slots – the reverse of an assignment a slot is your needs, a schedule space you need a volunteer’s assignment to fill.

What your volunteers are doing. From the person record

Job Associations



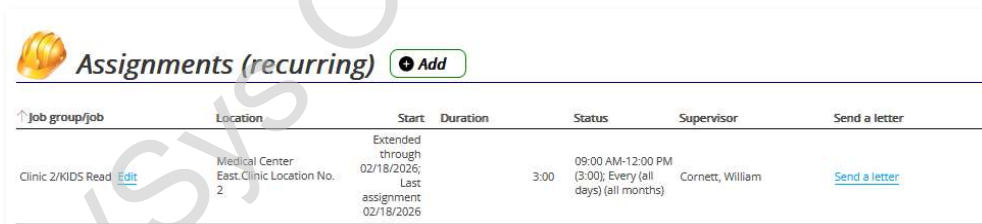
The screenshot shows a table titled "Job associations" with a yellow hard hat icon and an "Add" button. The table has columns for Job, Status, Location, Start, Finish, and Send a letter. There are three rows of data.

Job	Status	Location	Start	Finish	Send a letter
Medical Centers East/[EVAL] Clinic 1/Gift shop Edit	Active	Medical Center East.Clinic Location No.1	07/15/2015		Send a letter
Medical Centers East/Hospital A/Emergency Room Support Team Edit	Inactive	Medical Center East.Hospital A	07/15/2015	08/31/2016	Send a letter
Medical Center North/Hospital B/Information desk Edit	Active	Medical Center North.Hospital B	11/11/2020		Send a letter

While job associations can be something a volunteer needs to be qualified to do, it can also be a variable for hours management breakout – committees, programs, anything that requires hours tracking. Then this can be a filter for communication.

Recurring Assignments

Recurring Assignments require the same information you would tell a volunteer – Job, Location, Start date, times.



The screenshot shows a table titled "Assignments (recurring)" with a yellow hard hat icon and an "Add" button. The table has columns for Job group/job, Location, Start, Duration, Status, Supervisor, and Send a letter. There is one row of data.

Job group/job	Location	Start	Duration	Status	Supervisor	Send a letter
Clinic 2/KIDS Read Edit	Medical Center East.Clinic Location No. 2	Extended through 02/18/2026; Last assignment 02/18/2026	3:00	09:00 AM-12:00 PM (3:00); Every (all days) (all months)	Cornett, William	Send a letter

In a profile it shows as the “rule” for the assignment. Clicking **Edit** will show the individual shifts. Use the **+Add** button above the section to add a new recurring assignment.

Recurring assignment

Job

KIDS Read

Location

✖

Clinic Location No. 2

✖

First date

02/29/2024

End date

02/18/2026

Start time (9am)

9am

Duration each day

3

Months

✖

January

✖

February

✖

March

✖

April

✖

May

✖

June

✖

July

✖

August

✖

September

✖

October

✖

November

✖

December

✖

Days of week

✖

Sunday

✖

Monday

✖

Tuesday

✖

Wednesday

✖

Thursday

✖

Friday

✖

Saturday

✖

Weeks

✖

Every

✖

Status

Normal

Supervisor

✖

Cornett, William

✖

☐ Prevent bulk/automatic extension

ⓘ

Note that these rules are not applied and new detail assignments are not created until you click [Apply rules]

Apply rules

↑ Date	Day	Time	Duration	Location	Supervisor	Source	Status/action
02/29/2024	Thu	09:00 AM	3:00	Medical Center East.Clinic Location No. 2	Cornett, William	New	Normal
03/01/2024	Fri	09:00 AM	3:00	Medical Center East.Clinic Location No. 2	Cornett, William	New	Normal
03/02/2024	Sat	09:00 AM	3:00	Medical Center East.Clinic Location No. 2	Cornett, William	New	Normal
03/03/2024	Sun	09:00 AM	3:00	Medical Center East.Clinic Location No. 2	Cornett, William	New	Normal
03/04/2024	Mon	09:00 AM	3:00	Medical Center East.Clinic Location No. 2	Cornett, William	New	Normal
03/05/2024	Tue	09:00 AM	3:00	Medical Center East.Clinic Location No. 2	Cornett, William	New	Normal

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Test Custom Text

Test Dropdown Field

Once you have entered the specifications click **Apply rules** to preview. **Save** what you have tested to add it to the volunteer's profile.

After you're done – remember to **Save** the profile as well.

Save

Save/stay

Schedules

So where does this volunteer fit in the big picture? **View/lookup schedules** to see what is going on.

This is a calendar view version (use the listing variation if you are a table person)

Here I have filtered it by the week view (top right corner). You see all the assignments listed in beige. Hovering over an assignment gives more details and options.

View/lookup schedules Online help

Start date: 03/01/2024 End date: 03/31/2024 Start time: End time: Jobs:

Locations: Assignments: Assignment statuses: Slot statuses:

☒ Show assignments independently of their slots Volunteer or supervisor name:

Mar 10 – 16, 2024

Sun 3/10	Mon 3/11	Tue 3/12	Wed 3/13	Thu 3/14	Fri 3/15	Sat 3/16
5p Pet Therapy Specialist: Dogs 5pm - 8pm -(3:00) Medical Center North.Hospital B : Vina S	8a Pet Therapy Specialist: Dogs 8am - 1pm -(5:00) Medical Center North.Hospital B : Beth S	8a Pet Therapy Specialist: Dogs 03/12/2024 8am-11am (3:00) Location: Medical Center North.Hospital B Wanted: 1: Michael H	8a Pet Therapy Specialist: Dogs 8am - 1pm -(5:00) Medical Center North.Hospital B : Beth S	8a Pet Therapy Specialist: Dogs 03/14/2024 8am-11am (3:00) Location: Medical Center North.Hospital B Wanted: 1: Michael H	8a Pet Therapy Specialist: Dogs 8am - 1pm -(5:00) Medical Center North.Hospital B : Beth S	10a Pet Therapy Specialist: Dogs 03/16/2024 10am-Noon (2:00) Location: Medical Center North.Hospital B Wanted: 5: Joseph L
	9a Pet Therapy Specialist: Dogs 9am - Noon -(3:00) Medical Center North.Hospital B : Michael C	9a Pet Therapy Specialist: Dogs 9am - Noon -(3:00) Medical Center North.Hospital B : Jackson H	8a Pet Therapy Specialist: Dogs 8am - 1pm -(5:00) Medical Center North.Hospital B : Darlene S	9a Pet Therapy Specialist: Dogs 9am - Noon -(3:00) Medical Center North.Hospital B : Jackson H	8a Pet Therapy Specialist: Dogs 8am - 1pm -(5:00) Medical Center North.Hospital B : Darlene S	11a Pet Therapy Specialist: Dogs 11am - 3:30pm -(4:30) Medical Center North.Hospital B : James M
	11a Pet Therapy Specialist: Dogs 11am - 3:30pm -(4:30) Medical Center North.Hospital B : James M	9a Pet Therapy Specialist: Dogs 9am - 11am -(2:00) Medical Center North.Hospital B : Missa B	9a Pet Therapy Specialist: Dogs 9am - 11am -(2:00) Medical Center North.Hospital B : Anita A	9a Pet Therapy Specialist: Dogs 9am - Noon -(3:00) Medical Center North.Hospital B : Michael C	9a Pet Therapy Specialist: Dogs 03/15/2024 9am-Noon (3:00) Location: Medical Center North.Hospital B Wanted: 2: Belinda G	3p Pet Therapy Specialist: Dogs 3pm - 7pm -(4:00) Medical Center North.Hospital B : Howard M

In this next example, I have filtered it by the week view again, but you see both Assignments (beige) and Slots (colored) below. Slots are the wrapper that indicate how many of a position you might need, and that act as a package if that assignment fills a pre-defined need.

Color code:

- Beige – unconnected assignments
- Red – slots that are empty
- Green – slots that are partially full – some connected assignments (See needed?)
- Light Blue – slot is fully staffed
- Royal blue (not shown) – in the past
- Bright green (not shown) - currently checked in

View/lookup schedules ? Online help

Start date: 03/01/2024 End date: 03/31/2024 Start time: End time: Jobs: xPet Therapy Specialist: Dogs

Locations: Assignments: x (no filter) Assignment statuses: xNormal Slot statuses: x(no filter)

☐ Show assignments independently of their slots

Volunteer or supervisor name: _____

Search **Cancel** **Bookmark**

Today **Mar 10 – 16, 2024** Agenda day Agenda week Day **Week** List Month

Sun 3/10	Mon 3/11	Tue 3/12	Wed 3/13	Thu 3/14	Fri 3/15	Sat 3/16
9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B	10a Pet Therapy Specialist: Dogs (2:00) @ Medical Center North Hospital B: Joseph L
10a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Beth S	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Michael H	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Beth S	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Michael H	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Beth S	11a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: James M
11a Pet Therapy Specialist: Dogs (4:00) @ Medical Center North Hospital B	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Jackson H	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Darlene S	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Jackson H	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Darlene S	12a Pet Therapy Specialist: Dogs (4:00) @ Medical Center North Hospital B
5p Pet Therapy Specialist: Dogs (5pm - 8pm) Medical Center North Hospital B: Vina S	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Michael C	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Missa B	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Michael C	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B	3p Pet Therapy Specialist: Dogs (3pm - 7pm) Medical Center North Hospital B: Howard M
	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Michael C	10a Pet Therapy Specialist: Dogs (2:00) @ Medical Center North Hospital B: Doris B, Jeannette G, Nora E, David E, Terry C	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B	10a Pet Therapy Specialist: Dogs (2:00) @ Medical Center North Hospital B: Bridget W, Lucy L, Mary L	9a Pet Therapy Specialist: Dogs (3:00) @ Medical Center North Hospital B: Belinda S, Patrick J	5p Pet Therapy Specialist: Dogs (5pm - 8pm) Medical Center North Hospital B: Vina S

Hint: Use the filters at the top to pick a job or person if there is too much on the screen.

Slots

So when do I use slots?

- 1) When you want to see a “needs” calendar. Have someplace that staffing is critical? This will let you see and search for your holes.
- 2) When you want volunteers to be able to self-schedule. Slots are what drive the openings for a volunteer to see when they can schedule online in VSys Live.

What if I don't want to do either of those things – do I need slots? No. All you really need to organize your volunteers are job associations – to connect them to what they are doing. Assignments are nice for calendars and schedules, but its up to you. If schedules change quickly, it might not be an efficient use of your time to keep them updated. And even if you use slots, you don't need to use them for all your positions.

Creating Slots

To create a slot find **Create job slots**

It's the opposite of an assignment but needs the same information – *I need 3 Wayfinders, Monday-Friday, 8am to noon*. And you can make a year's worth at once if they are all the same.

The important things are in yellow:

Create job slots

Job: Surgical Waiting Room Location: (undefined)

First date: 01/18/2022 Last date: 07/02/2022 Start time: 8am End time: 12pm

Count needed: 3 Days of week: xMonday xTuesday xWednesday xThursday xFriday xEvery x

Supervisor: x Bergin, Melissa

Visible on VSys Live how many days before: (days) Hide how many days before: (days) Available for sign up on VSys Live how many days before: (days) Unavailable for sign up how many days before: (days)

Required groups (any): Required people types (any):

Required lists (any):

Comments:

☒ Do not show for lookup on VSys Live ☐ Show on main calendar in VSys Live while volunteers still needed ☐ High priority opening ☐ No automatic extension

Test **Cancel**

Use the checkboxes on the bottom to hide or show on VSys Live (do you want volunteers to self-schedule?). Click **Test** before creating, and do a double-check that the times and the days of the week are right. Click **Save** when you are done.

Best practice: Ideally you should make each day's worth of slots for a position independently. Why? If there is a change it's cleaner to edit just one.

If the slot you made matches an assignment they will automatically match and line up. It might take a minute or two and you might need to refresh the screen.

Not getting what you expect?

Things need to match up. If the slot is 8am-12pm, but you know Dave comes in 8:30-12:30pm. They aren't going to line up. Open a second browser tab with the assignment in the person and the slot in **Edit slots**. Compare them. After you look at a couple it will be easy to spot what the mistake is. Correct either and try again.