

## Background

In Fall 2023, we changed the system to always show club selection to adult volunteers. This meant volunteers could select a club without selecting a club volunteer type. An unintended consequence is that volunteers who selected more than one club volunteer type or no club volunteer type can select a club without designating a club volunteer type with the club selection. If the volunteer selects exactly one club volunteer type when enrolling, then that volunteer type gets assigned to the club when selecting the club.

For most volunteers this does not pose a problem, but for Club Leaders that need to access the club roster, this prevents them from being able to do so. This document explains how to fix this problem.

## How To Detect The Problem

Club Leaders that you have granted access to the club roster are getting an Access Denied message or when you go to grant the access you see a Club Leaders list below. The Participation Status showing “Not Participating” and Status of “Inactive” even after you have approved the enrollment is showing the problem. In this example, Ed Cat and Lavender Cow have been granted access to the club roster, but only Ed can log in and see the roster. Lavender is having the problem this document describes the fix for.

|  Club Leaders |            |  |                      |          |
|--|------------|--|----------------------|----------|
| Last Name  | First Name | Roles  | Participation Status | Status   |
| Cat  | Billiam    | Club Leader (Organizational/General)                                       | Approved             | Active   |
| Cat  | Creampuff  |  | Not Participating    | Inactive |
| Cat  | Ed         | Club Leader (Organizational/General), Club Leader (Organizational/General) | Approved             | Active   |
| Cat  | Mango      |  | Not Participating    | Inactive |
| Chicken  | Lion       |  | Not Participating    | Inactive |
| Cow  | Lavender   |  | Not Participating    | Inactive |

## If Volunteer Enrollment Has Not Been Approved

You can tell if there is potential to be a problem before approving an enrollment by watching when you approve adult volunteers.

### Scenario 1: No Volunteer Type

In this example, the volunteer has a club listed on the Awaiting Review screen, but on the approval screen, there isn't a club volunteer type and no clubs are listed.

|      |        |                     |              |                  |           |                 |           |  |  |
|------|--------|---------------------|--------------|------------------|-----------|-----------------|-----------|--|--|
| Goat | Peanut | wi-goat@noemail.com | 608-123-0987 | Gilman Engineers | Volunteer | Awaiting Review | 9/18/2023 |  |  |
|------|--------|---------------------|--------------|------------------|-----------|-----------------|-----------|--|--|

#### Volunteer Types

| Volunteer Type    | Role                    |
|-------------------|-------------------------|
| Program Volunteer | County Committee Member |

#### Demographics

[Edit](#)

Managers are not able to add Volunteer Types to enrollments, so the only way to add one to an enrollment is to send back the enrollment and have the volunteer add the type. ***If the volunteer does not need roster access, there is no need to send back the enrollment.***

### Scenario 2: Multiple Volunteer Types

In this example, the volunteer selected more than one Club Volunteer Types. When selecting the club, they did not select which type to assign to the club.

#### Clubs

| Club Name        | County   | Volunteer Type |
|------------------|----------|----------------|
| Gilman Engineers | Training |                |

To fix this, click on the club name. In the window that appears, select one of the club roles from the drop down box and then click the Save button.

#### Edit Unit

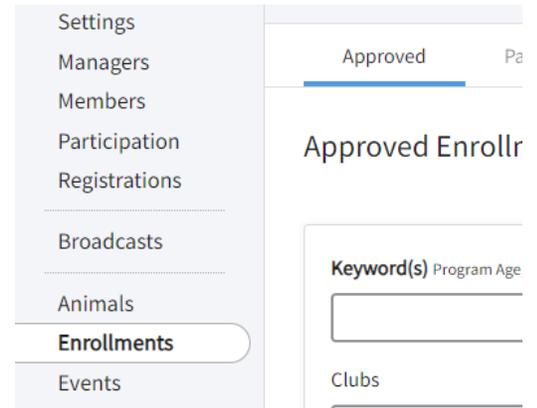
| Primary | Club             | Type | County   | Volunteer Type  |
|---------|------------------|------|----------|---|
| Primary | Gilman Engineers | Club | Training | <input type="text" value=""/><br>Club Project Leader<br>Club Enrollment Coordinator |

[Swap Club](#)

[Save](#) [Cancel](#)

## If Volunteer Is Already Approved

If the volunteer is already approved, then you need to look to see if they have a club volunteer type or not. To do this start at Enrollments -> Approved. Search for the volunteer and click on their name.



### Add Volunteer Type

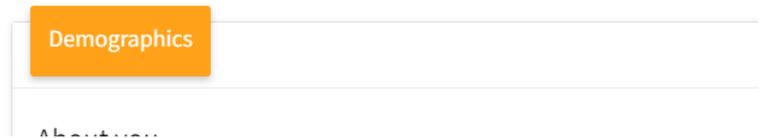
In this example, the volunteer does not have a Club Volunteer Type, so also does not have a Club section on the Approved Enrollments screen.

*If there is a Club Volunteer Type listed, skip to **Assign Volunteer Type To Club** section below.*

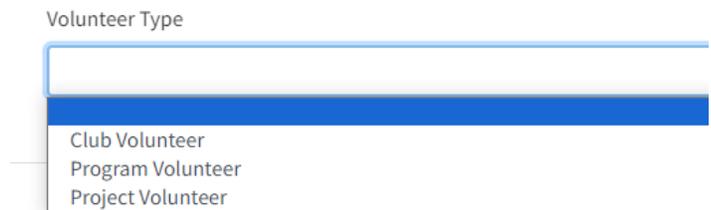
In the Volunteer Types section, click on the Edit button and then click on the Select Volunteer Types button.

From the drop down, select Club Volunteer, then click on the Add button next to any of the types on the next screen. Since they are needing club roster access, the most appropriate type is either Club Enrollment Coordinator or Club Leader (Organizational/General).

Click the Save button.



### Add Volunteer Type



## Assign Volunteer Type To Club

The Clubs section will now appear on the Enrollments screen. The club the volunteer selected during enrollment will be listed, but the Volunteer Type column will be empty. Click the club name.

The screenshot shows two sections: "Volunteer Types" and "Clubs".

| Volunteer Type       | Role                                 |
|----------------------|--------------------------------------|
| Program Volunteer    | County Committee Member              |
| Adult Club Volunteer | Club Leader (Organizational/General) |

| Club Name        | County   | Volunteer Type |
|------------------|----------|----------------|
| Gilman Engineers | Training |                |

On the window that appears, select from the drop down box the Club Volunteer Type you added and then click the Save button.

The "Edit Unit" dialog box contains a table with the following data:

| Primary | Club             | Type | County   | Volunteer Type  |
|---------|------------------|------|----------|---|
| Primary | Gilman Engineers | Club | Training | <input type="text" value="Club Leader (Organizational/General)"/> |

Below the table is a "Swap Club" button. At the bottom right of the dialog are "Save" and "Cancel" buttons.

The volunteer now has a Club Volunteer Type assigned to the club. If the volunteer's enrollment has been approved, and you have granted the volunteer rights to the club, this allows the volunteer to access the club roster.

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