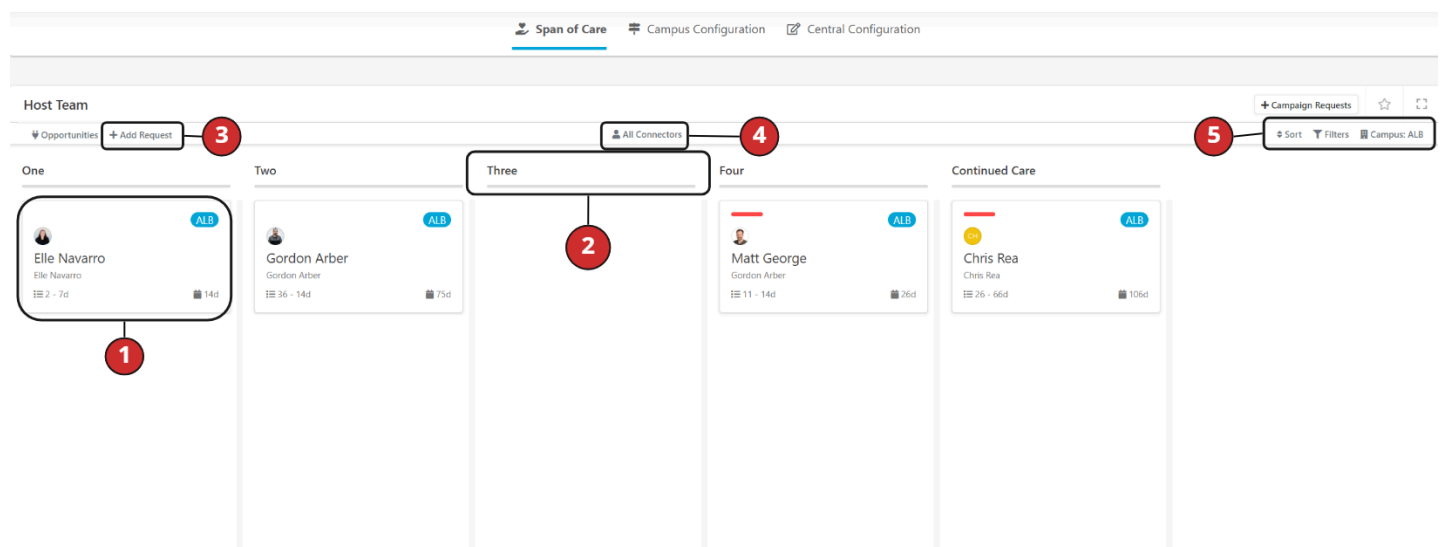


Span Of Care Board and Card

Welcome to the Span of Care page! Where you will spend most of your time when working with this tool/process. From here, you are able to view all of the cards that require your attention and follow-up.

Cards do not have to be manually moved at all. Instead, the cards will move by themselves when you follow up with the volunteer and after you click the "Followed-Up" button. Continue reading through this section to find out more!

The Board



1. The Card

is the card (a.k.a. - Connection Request) that represents the volunteer and moves along the process. You can click on each card to get a more in-depth look at the status of the card and even to make changes! Additionally, each card displays a few things from this view - their campus short code, their name, the [connector](#) assigned to them, and the amount of days they've been in the process.

2. The Columns

The columns are where the cards reside in the process and what the cards move in between. In the example board above, the goal is to get the cards from "One" to "Continued Care".

3. Manually Adding a Request

Clicking this button allows you to manually add a requester into the span-of-care process. Adding a new request will open a pop-up (displayed below) where you can choose the Requester (the applicant), Connector, Campus, desired Placement Group, and other ministry-specific options!

4. Connectors

Clicking on this filter allows you to narrow down the displayed cards so that you are only viewing cards with the selected connector. This can be especially helpful if you are only wanting to look at all cards assigned to yourself. To clear the filter, simply click on the 'X'.

5. Filters

One of the most used and helpful tools within onboarding is the filters which you can find in the upper right-hand corner of the board!

Filters that are available for use are: Status

- Used if you only want to see cards within a specific column!

State

- This filter can be used for seeing cards that have a specific! Such as active or inactive!

Volunteer/Requester

- If you are looking for a specific volunteer on the board - this filter is for you! Just remember to clear the filter whenever you are done - this will bring the other cards back into view!

Last Activity

- If you want to see all the cards with a specific "last activity" you can use this filter to grab the cards that fit the bill.

The “requester” is the volunteer applicant that is moving through your span of care/follow-up process! They are represented as the card that is displayed on your board!

2. The Connector:

That’s you! Or whoever it is that is assigned to follow up with the requestor. Being the connector of a requestor means you will receive email updates about when it is time to follow up with the volunteer!

3. Connection Request Info:

The top right-hand corner of the connection request displays some useful information pertaining to the selected card/connection request. This includes - which campus the card is assigned to, which board the card is on, which column the card is in on the board, and finally - what the Status of the card is. Below is a detailed explanation of each status.

4. Person Profile:

Clicking on this button will take you directly to the volunteer/requester’s person profile!

5. Remove From Workflow Button:

This button will remove cards from the process/workflow! This is used to replace the “delete” functionality while also retaining data!

6. Followed-Up Button:

This button is what will be clicked when you have followed up with a volunteer after they have been snoozed in a column for the amount of time your central team chooses.

Clicking this button will move them from the column they are currently in, to the next one automatically!

7. Column Instructions:

This section will display information/instructions for you and your team to follow while the cards are in a specific column! These instructions are set and put in place by your Central Team Leaders

8. Serving Information

This section displays which Check-In groups the volunteer is a part of and also shows the number of check-ins that have been recorded within those groups for the volunteer!

9. Activities:

This button will allow you to add activities to the card! Some of the notes you can add are: Add Note To Person

- Saving this activity (if there is text within the note box) will add whatever message is within the note box to the person's profile!

ContactedReached out (No Response)

Activities

Activity Type

Add Note to Person

Add Note to Person

Contacted

Reached out (no response)

Connector

Elle Navarro

Save

Cancel