



Uploading a Volunteer Paper File into Volunteer Central

Ideally, MSU Extension staff will move away from housing volunteer files in the physical, paper format and move toward keeping files online in Volunteer Central. This is not a requirement, however, several staff will find it convenient to have access to volunteer files in an online format rather than a paper format. This fact sheet will help staff to understand some best practices in uploading paper files, flexibility in this process, and ideas for being able to access uploaded volunteer file components.

Scanning VSP Paper Files

When scanning volunteer paper files, please follow these guidelines:

- VSP file documents must be saved in a pdf format.
- Paper files can be scanned in a few different ways. Staff should determine which way works best for them based on the volunteer file and its components.

1) One continuous file.

This method is suggested when there are not many additional pieces of documentation beyond the required VSP file components: staff action form, application, references, interview, and volunteer acceptance letter. This is also appropriate when staff feel it is unlikely they will need to review a volunteer's file routinely.

When using this method, the continuous file should be saved as a pdf and labeled with the volunteer's last name and the words legacy file: "Smith, Legacy File."

2) Multiple files.

This method is suggested when there are additional pieces of documentation found in the volunteer file such as awards/ certificates, milestone recognition, newspaper articles, correspondences, code of conduct violations, injury/property damage reports, or any documentation of conversations that go beyond normal pleasantries.

When using this method, the VSP components and any documentation, not including documentation of staff conversations with the volunteer, should be saved as a pdf and labeled with the volunteer's last name and the words legacy file: "Smith: Legacy File." Documentation of staff conversations with the volunteer should be saved as a pdf and labeled with the volunteer's last name and the words documentation of conversations: "Smith: Documentations of Conversations."

To contact an expert in your area, visit extension.msu.edu/experts or call 888-MSUE4MI (888-678-3464)

MSU is an affirmative-action, equal-opportunity employer, committed to achieving excellence through a diverse workforce and inclusive culture that encourages all people to reach their full potential. Michigan State University Extension programs and materials are open to all without regard to race, color, national origin, gender, gender identity, religion, age, height, weight, disability, political beliefs, sexual orientation, marital status, family status or veteran status. Issued in furtherance of MSU Extension work, acts of May 8 and June 30, 1914, in cooperation with the U.S. Department of Agriculture. Jeffrey W. Dwyer, Director, MSU Extension, East Lansing, MI 48824. This information is for educational purposes only. Reference to commercial products or trade names does not imply endorsement by MSU Extension or bias against those not mentioned.



Uploading VSP Files

To upload pdf documents, see the graphic below and follow these steps:

- 1) Once paper files have been scanned and saved as a pdf, staff need to log into Volunteer Central's eCoordinator, locate the volunteer's name and open their profile.
- 2) Go to the attachments tab. See #2 in the graphic below.
- 3) In the attachments tab, on the left is a list of attachments. To upload volunteer files, staff will primarily be using the attachments labeled "Legacy Volunteer File" and "Documentation of Conversations with Volunteer." See the red arrows below.
 - If staff chose option #1 above, to scan volunteer files in one continuous file, the saved pdf should be uploaded into the Legacy Volunteer File on the attachment list.
 - If staff chose option #2 above, to scan volunteer files into multiple files, the saved pdfs should be uploaded using both the "Legacy Volunteer File" and "Documentation of Conversations with Volunteer" on the attachments list.
- 4) To upload, click on the title of the attachment, such as "Legacy Volunteer File." That title will become bolded showing that it's selected.
- 5) Under "File," click on the "Choose File" box. Select the file from your computer and then click "Open." See #5 in the graphic below.
- 6) Click on the box "Upload" to upload the pdf file. If successfully uploaded, you will see a green check mark next to the title on the attachment list. See the green check mark next to the first red arrow below.
- 7) To finalize the upload of the pdf documents, click on the "Finish" box in the lower right-hand corner.
- 8) It may be helpful to go back into the volunteer's profile and revisit the attachments tab to be sure that the correct files uploaded successfully before moving forward with deleting the pdf file from your computer.

Deleting Saved Volunteer Files from Computer

It is not an acceptable practice to keep volunteer files on MSU Computers, thumb drives, or other external devices. Staff should delete them from these sources as soon as they have confirmed that the pdf files have successfully uploaded into Volunteer Central. Files should also be removed from computer Recycle Bins.

Destroying Paper Volunteer Files

Once volunteer files are successfully uploaded and pdf files are removed from computers, thumb drives or other external devices, it is acceptable to destroy paper volunteer files by shredding them. Volunteers who are inactive need to have their files saved for three years before destroying.

There are instances when paper volunteer files must NOT be destroyed and can not be uploaded into Volunteer Central including: volunteer applicants that have not been accepted and volunteers that have received disciplinary action including suspension and/or dismissal. In these instances, volunteer paper files must be kept in a locked file cabinet in the MSU Extension office.



Volunteer Profile: *Heverly TEST, *Christine TEST **#2**

Volunteer Info | Volunteer Info - Clean | Screening | Annual Compliance | **Attachments** | Notes and History | Log Book | EMG

Attachment List

Uploaded	Attachment
-	Profile Image
-	DO NOT USE! - Deprecated IIN field
-	ICHAT Report
-	MIPSOR Report
-	Reference 1 Paper Return
-	Reference 2 Paper Return
-	Reference 3 Paper Return
-	Reference 4 Paper Return
-	Reference 5 Paper Return
-	DO NOT USE - will be deleted
✓	Documentation of Conversations with
-	Legacy Background Check
-	Legacy Volunteer File
	Other: new (enter description)

Image Preview

Upload date: _____

Uploaded by: _____

This attachment visible in eRecruiter:

Download Delete

Notes:

Save notes and description Restore notes and description

Label of "Other: new"

Modify Attachment

File: No file chosen **#5**

Prev Next **Apply** Finish Cancel **#7**