Attendance

Establishing a check-in process and logging hours

bloomerang volunteer

Learning the volunteer management system

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Attendance Tracking

Bloomerang Volunteer offers two methods to track attendance: **General Check-in** or **Shift-based Check-in**. Attendance tracking is important because it will help with deriving hours worked by user. Tracking attendance will also provide the organization with valuable insight into regular operations and can be used to set goals and identify problem areas. This insight can also help keep the team engaged and increase overall productivity.

❶ General Check-in

What is General Check-in?

The General Check-in feature is used to track arrival and departure times and provides a high-level look at the overall attendance of the Opportunity itself. General Check-in is not matched against Scheduled Shifts and should only be used as a high-level summary to track the ins and outs, and the total hours between.

Basic Settings

- Administrator Check-in: Only allow administrators to check in/out users.
- Self Check-in: Allow Staff to check themselves into their Opportunity.

✔ Pros of using General Check-in

- It provides a high-level look at Opportunity attendance.
- It is the simplest way to track attendance.

✘ Cons of using General Check-in

- It is not compared to the schedule, so it does not track in-depth activity against a Shift, such as overtime hours, late arrivals and early arrivals.

Best Practices

- For general arrival and departure times that do not map to Shifts, choose General Check-in.

Scenarios

- If you are running an Opportunity and just want to track the days/dates people showed up.
- If you do not require a schedule and just want to know at a high level if people attended and for how long.

❷ Shift Check-in

◈ What is Shift Check-in?

The Shift Check-in feature is used to track hours worked on a shift-by-shift basis. Shift Check-in is matched against Scheduled Shifts and can be used to track overtime hours, late arrivals, early arrivals, and no-shows.

⚙ Basic Settings

- Administrator Check-in: Only allow administrators to check in/out users.
- Self Check-in: Allow Staff to check themselves in/out of their Shifts.
- Automatic Shift Clock-Out: Set a retroactive clock-out that will be recorded 4 hours after the end-time of a Shift if there is no recorded clock-out for the user. The purpose of 4 hours is to leave enough time for any late check-outs.

✔ Pros of using Shift Check-in

- Provides Managers with a way to track attendance on specific Shift times.
- Provides an easy way to track if users are late to Shifts or are working overtime.
- Provides heavier tracking capabilities on a shift-by-shift basis.

✘ Cons of using Shift Check-in

- If no Schedule is created, Shift-check-in cannot be used.
- If you have simple check-in requirements, this feature might be too robust.

✪ Best Practices

- Users tend to forget to Check-out of their Shifts; enabling the Automatic Shift Clock-out feature will save a tremendous amount of administrative time when calculating hours worked.

✪ Scenarios

- Users tend to forget to Check-out of their Shifts; enabling the Automatic Shift Clock-out feature will save a tremendous amount of administrative time when calculating hours worked.

Designing a Solid Check-in Process

Bloomerang Volunteer offers a variety of methods that users can be Checked-in/out. Choosing a strategy that best aligns with the Opportunity's operations and goals is vital to the overall success of the Organization. It is important to take time to plan out a proper Check-in/out strategy in advance of setting up the Opportunity so that the appropriate data is collected by the right person.

Users can be Checked-in in three ways: by a **Manager**, by **themselves**, or by a special "**Check-in Administrator**" role.

If users are allowed to check themselves in/out, another important feature to consider in the design phase is the enablement of **Geo-Location Tracking**, which provides visibility over whether or not a user is in adherence to the set Check-in radius.

❶ Manager-based Check-in

◈ **What is Manager-based Check-in?**
A Manager-based Check-in is when an Administrator performs the Check-in action on behalf of the user. This action can be carried out by system-level permissions, including Managers, Role Managers and Shift Supervisors. Manager-based Check-in can also be performed on both types of Check-in styles, including General Check-in and Shift-based Check-in.

◈ **How does it work?**
A Manager-based Check-in can happen in two ways: through the Mobile Application or the Web Application.

Mobile App
The mobile app is downloaded onto the Manager's personal device, where they can log in and record check-in/out times against a specific user.

Web App
Once a Manager log's into the system through the web browser, there are several areas in the Administrator's interface where the Check-in action can be carried out. Individual Check-in/out actions can be taken, as well as bulk Check-in/out activities.

✪ Typical Setup
Typically, Manager-based Check-in is used for Opportunities that require heavier monitoring over the attendance of Staff and Volunteers, especially on the Shift level.

✔ Pros of using Manager based Check-in
- Managers can provide a more reliable, accurate and truthful depiction of check-in/out times.
- Multiple manager-level permissions can be used for Check-in, including Opportunity Managers, Role Managers and Shift Supervisors.
- Staff and Volunteers don't need to be trained on learning the Check-in interface and process.

✘ Cons of using Manager based Check-in
- If the Opportunity is happening over a vast area, users might have difficulty tracking down their Managers to be Checked-in.
- If the Managers have many other duties they are responsible for executing, the additional task of checking in/out users could be seen as a burden on their productivity.

✪ Best Practices
- Always train Managers on how to perform the Check-in/out actions. Bloomerang Volunteer has special training videos and knowledgebase articles to assist with this.
- There are multiple areas for Administrators to perform the Check-in/out actions. Each area is designed to be relevant to the current context of the Administrator.
- Save time by actioning in bulk! The Web and Mobile app offer bulk Check-in/out capabilities.
- Narrow down sets of data by filtering check-in status. The Web and Mobile Apps offer filtering capabilities based on the current check-in status of users.

❷ Self Check-in

◈ What is Self Check-in?
Self Check-in is when the Staff and Volunteers are permitted to track their own attendance by performing the action of checking themselves in. Self Check-in can also be performed on both types of Check-in styles, including General Check-in and Shift-based Check-in.

◈ How does it work?

Self Check-in can happen in two ways: through the mobile app or through Bloomerang Volunteer's Kiosk.

Mobile App

The mobile app is downloaded onto the user's personal device, where they can log in and track their own Check-in/out times.

Bloomerang Volunteer's Kiosk

The Kiosk is a browser-based application that can be set up on a tablet or computer as a generic station for volunteers to track their own Check-in/out times.

✪ Typical Setup

Mobile App

Typically, the Mobile app is leveraged with ongoing Opportunities or Programs that do not have a designated Check-in station or area.

Kiosk

Typically, the Kiosk is leveraged in an Event setting, where Staff and Volunteers are required to stop at a special station before entering the Event. This could also be used for ongoing Programs that have a static Check-in station on site.

✔ Pros of using Self Check-in

Mobile App

- Users can Check-in 'on-the-fly' from any location.
- Users have more control over the hours being submitted.
- More responsibility is placed onto the users, offloading Administrators.

Kiosk

- Staff and Volunteers don't have to download anything on their personal devices.
- The kiosk is typically situated in the same location, so users will always know where to go to Check-in.
- The interface is designed for non-tech savvy users and is very simple to use, only requiring a couple of button clicks to Check-in.
- Users can Check-in on their own timeline without an administrator present.

✘ Cons of using Self Check-in

Mobile App

- If the user demographic is not tech savvy, self Check-in could be seen as a challenge.
- The Bloomerang Volunteer Mobile app download is required to perform this action.
- Administrators must rely on users to remember to Check-in/out.

Kiosk

- Typically, the Kiosk Station is always located in the same areas, making Check-in 'on-the-fly' from different locations a challenge.

Best Practices

- Allow self-check-in if users can be trusted to carry out the process.
- Whether the Mobile App, or the Kiosk is being used, always train users on how to perform the action. Bloomerang Volunteer has special training videos and knowledgebase articles to assist with this.

3 Special Check-in Administrator Role

What is a Check-in Administrator?

This is a special Bloomerang Volunteer system Role designed for attendance tracking purposes. Check-in Administrators can check Staff in and out of their Shifts (Or Opportunity) on behalf of the users.

What is the purpose of this Role?

This Role comes into play when Staff are not granted permission to check themselves in and out, or if the Managers are unable/too busy to perform the action.

How does it work?

Depending on the attendance settings, the Check-in Administrators can check Staff in and out. In order for Check-in Administrators to have access to these permissions, they must be added to the Role.

Basic Settings / Permissions

The Check-in Administrator Role has permissions solely on the mobile app and comes into play when *LiveMode*™ is enabled. Check-in Administrators have access to the full Staff List, which includes contact information and personal Schedules.

Typical Setup

Typically, the Check-in Administrator Role is leveraged in an Event setting, where Staff and Volunteers are required to stop at a special station before entering the Event.

Best Practices

- A trusted Staff or Volunteer typically operates this Role, not an Administrator or Manager.
- Using the Check-in Administrator interface on Tablets or iPads can help with ease of use.

4 Geo-Location Tracking

What is Geo-Location Tracking?

The ability for Administrators to track the latitude & longitude of where a user Checked-in/out from.

How does it work?

The Geo-Location Tracking feature ensures users check themselves in/out from the appropriate area. Set a custom Adherence Radius on the Opportunity or Venues' addresses and pull reports to see precisely where Staff checked in from. If Staff checked themselves in/out outside the radius, the system will flag it.

Basic Settings

- Set Adherence Radius: Set the maximum distance away from the location that you want users to Check-in from.
- Unit of Measurement: Customize the unit of measurement by Miles, Kilometers, Feet, Meters, or Yards.
- Mobile Accuracy: The system will report on the accuracy range of the users' mobile devices to help further determine if they are in or out of adherence.

✔ Pros of using Geo-Location Tracking

- Detect fraudulent behavior and see if volunteers are being truthful about where they said they Checked-in/out from.
- Know the exact location of where users are checking-in/out from.
- Understand how far away users are from the set location.
- Capture more accurate hours.

✘ Cons of using Geo-Location Tracking

- This feature is designed to only work on Self-based Check-in; if Administrators Check-in users on their behalf, it will not track the location.
- It might be too robust for what needs to be tracked and the overall requirements of the Opportunity.

✪ Typical Setup

Typically, the Geo-Fence Tracking is leveraged in an Event setting, where there are not enough resources to provide additional supervision onsite with the Staff and/or Volunteers.

Logging Hours Worked

Bloomerang Volunteer offers multiple methods for inputting and logging hours worked. Hours can be logged **automatically**, Administrators can log hours **manually** on behalf of users, or users can log their **own hours**.

If the chosen strategy is to have hours worked get logged manually, consider incorporating a reminder strategy to the actioners. Reminders will help prevent data from being forgotten about and not added into the system. If Administrators are required to log hours on behalf of users, consider planning for a regular dedicated time-block that is set aside specifically for data entry to prevent the hours worked data from piling up or going stale.

➊ Logging Hours Worked: Automatically by the System

◈ **What is automatically logging hours?**
Administrators can choose to automatically have the system add in attendance logs for General Check-in and Shift-based Check-in. This is extremely useful for Opportunities looking to reduce their administrative time.

◈ **How does it Work?**
The Bloomerang Volunteer system will automatically assign hours worked to a user based on the total length of the Shift.

◈ **What are the different automatic methods/ settings?**
Bloomerang Volunteer offers four different ways hours can automatically be assigned to users:

◈ **Do not automatically assign hours worked.**
Hours worked will be calculated from the users' original check-in/out times.

✪ *Typically, this setting is used when the administrator wants to capture exact timelines of when a user Checks-in/out, right down to the minute.*

◈ **Automatically assign hours worked if a Check-in occurs at any point in time.**
The total Shift length will be attributed to the user regardless of how long the User was actually Checked-in for. For example, if the user was Checked-in for 4 hours and the Shift length was 2 hours, the user will only be assigned 2 hours. If

no Check-in occurs, 0 hours will be assigned to the user, allowing Administrators to see who did not attend their Shift. For logging purposes, the system will always record when the user originally Checked-in/out.

> ✪ *Typically, this setting is used when the administrator wants clean data that reflects the exact start and end time of the shift when a user Checks-in, but still wants to keep track of who never Checked-in at all.*

◈ **Automatically assign hours worked if a Check-in does not occur.**
The system will attribute the total Shift length if no Check-in activity happens. For example, if the user never Checked-in to their 2-hour Shift, they will be assigned 2 hours. Users who do Check-in will have their hours calculated from their original check-in/out times.

> ✪ *Typically, this setting is used when there are reliable users who will always show up and tend to work at a regular frequency, and a Check-in action is not required.*

◈ **Automatically assign hours worked if a Check-in occurs or does not occur.**
If the user is part of a Shift, the system will always automatically attribute the total Shift length to scheduled users, regardless of any Check-in activity. For example, if a user Checks-in to their 2-hour Shift or if they do not Check-in to their 2-hour Shift, the user will be assigned 2 hours.

> ✪ *Typically, this setting is used when the Administrator wants accurate data that reflects the Shift's exact start and end time, regardless of when or if a Check-in activity occurs.*

✔ Pros of using Automatic Logging

- Administrators no longer need to spend time retroactively assigning/removing hours manually.
- Highly reliable and will improve accuracy.
- This is the easier form of tracking hours.
- The data will always be clean and reflect the Shift's exact start/end times.

✘ Cons of using Automatic Logging

- This feature is designed to only work on Shift-based check-in and cannot be enabled for opportunities using General Check-in.

- The exact timestamp of when a user Checks-in will not be reflected in the system; however, the original timestamps can always be retrieved in reports.

❷ Logging Hours Worked: Manually by Administrator

◈ What is manually logging hours (by the Administrator)?
Administrators can manually add attendance logs for General Check-in and Shift-based Check-in. This functionality is extremely useful if the Opportunity takes place in an area with limited connectivity, and the Mobile App is not an option for this function.

Typical Scenario
Manual logging typically happens by an Administrator after the Shift or Opportunity takes place. *For example, if some attendance times were recorded on paper, or if there are any connectivity issues at the time of entry*.

◈ How do Administrators manually log hours?

Hours and Minutes
Administrators can bulk or individually assign hours worked to users in an Hours and Minutes forma*t. For example, Sally Susan worked 4 Hours and 23 Minutes on July 30th.* This can be done on both the web application and mobile application.

Start and End Time
Administrators can bulk or individually assign hours worked to users in a Start and End Time forma*t. For example, Sally Susan worked from 3:00 pm to 7:23 pm on July 30th.* This can be done on both the web application and mobile application.

On a Specific Shift
Administrators can log the hours directly on a User's Scheduled Shift. There are several spots in the interface where this can be done, including the Staff Profile and Staff Schedule View. Administrators will be prompted to fill in the date, in-time and out-time.

⚙ Basic Settings
- Additional Notes / Comments: Leave further details surrounding the log for context and tracking purposes.
  - *Helpful Tip: Use comments to track additional attributes surrounding the Shift, if the users were late, etc.*

✔ **Pros of Administrators Manually Logging Hours**

- The data can be as accurate as it needs to be, and the exact time-stamps can be tracked.
- Administrators have full control over what gets assigned to Users.

✘ **Cons of Administrators Manually Logging Hours**

- It can take administrative time to log and/or remove the hours.

❸ Logging Hours Worked: Users Self-Serving

◈ **What is users manually logging their own hours?**

Users can self-serve by manually adding in their own attendance logs. This is extremely useful for Organizations looking to reduce their administrative overhead, or, if shifts and schedules are not required, but tracking hours is.

◈ **How do users manually log their hours?**

Users can manually log their hours on both web and mobile applications. The user must first define the Organization, Opportunity and date the hours are attributed to. The system will detect if they were scheduled in a shift during that time, and the user can choose to attribute the hours to a specific shift or just in general.

⚙ **Basic Settings**

- Additional Notes / Comments: Leave further details surrounding the log for context and tracking purposes.

✔ **Pros of Users Self-Serving Hours**

- Users have complete control over recording their own hours.
- Place the onus onto the users to track their own hours and free up administrative time.

✘ **Cons of Users Self-Serving Hours**

- It can take administrative time to verify the logs to ensure the users are being accurate.

Tracking Hours Worked

Bloomerang Volunteer offers several ways of tracking hours, including a series of **automated reports**, **customized exports**, **methods of communicating** those hours tracked to users, and **user visibility**.

The hours worked data that the system provides is critical to helping determine overall success metrics for the Organization. Tracking hours worked will provide the Organization with visibility over allocated resources, and help ensure that the time users are dedicating toward the cause is put to best possible use. Analyzing hours worked data will help the Organization better determine where funding is required. In addition, tracking hours worked can not only be used for auditing purposes, but it can also show consistent evidence that resources are required, increasing overall credibility when looking for more grants and funding.

➊ Track Hours Worked: Automated Reports

◈ **What are the Automated Reports?**
These are reports that the Bloomerang Volunteer system generates based on Check-in data. Depending on the Attendance tracking settings, these reports can be general overviews of in and out times, or detailed Shift reports that compare the hours Checked-in vs. the hours scheduled.

◈ **How to Generate the Reports?**
All Attendance based reports are available at both the Organization Level and Opportunity Level. Managers can download these reports as a .CSV file to get a summary of the activity. These reports can then be edited in an application such as Excel. This data can be used to evaluate the Staff/Volunteers, or report on hours for payroll, grants, etc.

◈ **Specific Reports**
The following is a list of available reports that the Bloomerang Volunteer system generates:

Hours Worked by Staff [High-Level Summary Report]
This high-level report includes the total accumulated Hours by each individual Staff Member. Customize how you want the report columns to display the accumulated data: by Total, Total by Day, Total by Week, Total by Month, or Total by Year.

Hours Worked by Staff [Mid-Level Report]
This mid-level report breaks down the total accumulated Hours by each individual Staff Member, and outlines the total amount of Entries, the Entry Style (ie. Shift Check-in, General Check-in, Hours/Minutes vs Start/End Time, etc) and the total hours per Entry Style.

Hours Worked by Staff [Deep-Level Logs]
This is a master Log that breaks down each Hours Worked entry by an individual Staff Member and gives an overview of all the activity. The report outlines the total hours per entry, Entry Style (Number vs Start/End Time), Check-in Type (Shift vs. General), and who it was actioned by.

General Check-in/out by Staff [Deep-Level Logs]
This Log includes timestamps of General Check-in activity only (it does not include Shift Check-in/out Activity). The Log reports who took the action, and calculates the total hours between the first and last Check-in.

Shift Check-in/out by Staff [Deep-Level Logs]
This Log includes timestamps of Shift Check-in activity only (it does not include General Check-in/out Activity). The Log reports who took the action, and calculates the total hours between the first and last Check-in against a Shift.

Hours Worked by Groups [Mid-Level Report]
This mid-level report breaks down the total accumulated Hours by each Group, and outlines the total amount of Entries, the Entry Style (ie. Shift Check-in, General Check-in, Hours/Minutes vs Start/End Time, etc) and the total hours per Entry Style.

Shifts Worked by Groups [Mid-Level Report]
This mid-level report breaks down the Shifts worked by each Group. It outlines the total amount of Shifts the Group participated in, the number of Check-ins/outs, and matches the Total Hours Worked against the Total Hours Scheduled.

Hours Worked for this Opportunity [High-Level Summary Report]
This high-level report includes the total hours accumulated for this Opportunity. Customize how you want the report columns to display the accumulated data: by Total, Total by Day, Total by Week, Total by Month, or Total by Year.

Hours Worked for this Opportunity [Deep-Level Logs]
This log breaks down each Hours Worked entry for this Opportunity, and gives an overview of all the Staff Activity.

Hours Worked by Venue [High-Level Summary Report]
This high-level report includes the total hours accumulated for each Venue. Customize how you want the report columns to display the accumulated data: by Total, Total by Day, Total by Week, Total by Month, or Total by Year.

Hours Worked by Venue [Deep-Level Logs]
This log breaks down each Hours Worked entry by Venue, and gives an overview of all the Staff Activity.

Hours Worked by Tag [High-Level Summary Report]
This high-level report includes the total Hours worked associated with a Tag. Customize how you want the report columns to display the accumulated data: by Total, Total by Day, Total by Week, Total by Month or Total by Year. Please Note: This report is NOT a sum for Total Hours Worked (ie. Staff with the same Tag in a single Shift will be counted multiple times).

Hours Worked by Tag [Mid-Level Report]
This mid-level report breaks down the total accumulated Hours by the Tags associated with the individual Staff Member scheduled in the Shift. The report outlines the total amount of Entries, the Entry Style (ie. Shift Check-in, General Check-in, Hours/Minutes vs Start/End Time, etc) and the total hours per Entry Style.

❷ Track Hours Worked: Customized Exports

◈ What are the Customized Exports?
Administrators can build their own customized data exports that can include relative information about the user, along with critical data such as total lifetime hours worked, total hours worked for an opportunity, etc.

✔ Pros of Customized Exports
- Design the export to include specific data pertaining to the user to help with placement decisions.
- Print out the export for manually tracking attendance onsite with pen & paper.

✘ Cons of Customized Exports
- Customized exports will not have as deep-level logging data as the reports do.

❸ Communicating Hours Tracked

◈ How do you communicate hours tracked?

Administrators can build customized email templates that can be sent to users manually or set up in a recurring automation. These templates can include special personalization tags designed to display the hours worked for the specific receiver.

◈ How does it Work?

In an email message body, Administrators can embed a custom range of Hours Worked from any level of the system. Hours can be inserted from specific Opportunities, over a specific timeline, from a specific date or even against a past Shift that was worked.

✔ Pros of Communicating Hours Tracked

- Keep users engaged with the Organization and/or Opportunity.
- Users can review their attributed hours and make modifications or suggest modifications to an Administrator.
- Motivate users to build up more hours.
- Show appreciation and congratulate users for their current time committed to the Organization.

✘ Cons of Communicating Hours Tracked

- If hours are inaccurate, have not yet been attributed, or have not been pruned by an Administrator, a volume of users might be reaching out about modifications.

❹ Track Hours Worked: User Visibility

◈ What do users have visibility over?

Bloomerang Volunteer provides a personal dashboard for each user that breaks down their hours worked in a variety of different ways including: lifetime hours across organizations, hours worked today, this week, this month, this year and by Organization or Opportunity.

◈ **How does it work?**

Users have the ability to filter hours worked by all of the methods listed above, and in addition, by a date range. With these capabilities, users can export/download those hours if they are required to provide them to a third party.

✔ **Pros of User Visibility Over Hours Worked**

- Users are more accountable to monitoring their attributed hours.
- Users can monitor their own progress without having to contact an Administrator.
- Users can set personal goals and track their progress across multiple Organizations.

✘ **Cons of User Visibility Over Hours Worked**

- With additional visibility, users may reach out to Administrators if they notice any discrepancies.