



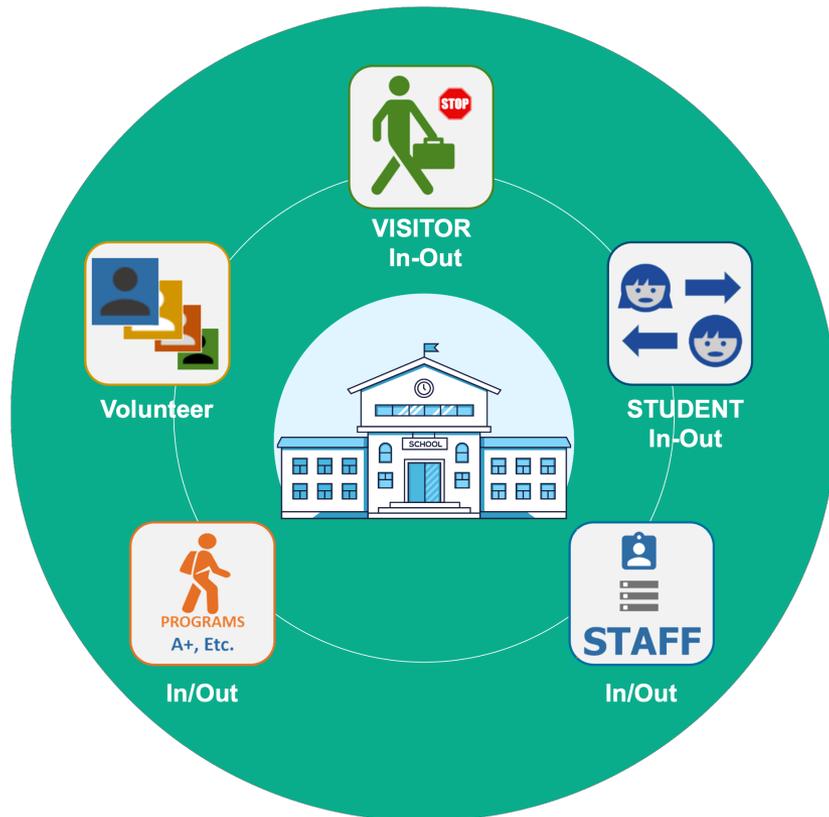
Visitor Management System Training

Volunteer Module

Visitor Management Instructions

Visitor management is critical to the safety and security of your school, students, and staff. KIDaccount provides a simple interface that allows you to securely manage visitors entering the school and provide badges for immediate identification of each visitor. KIDaccount's comprehensive system also includes the ability to sign-in and sign-out for staff and students to ensure accountabilities for all souls on campus.

The visitor management system offers two points of access – one is the kiosk mode which will be used on the computer/tablet for the visitor, staff, or students to sign in and sign out while the other is the administrator display where the secretary will approve or deny a visitor and print badges.

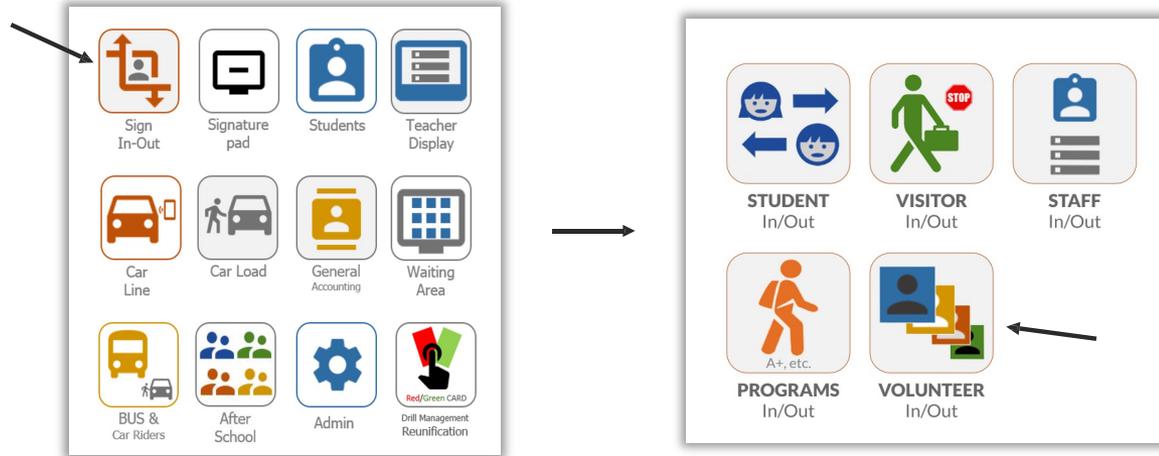


These instructions include:

1. Add a Volunteer
2. Edit Volunteer Profile
3. Volunteer Reports

Add a Volunteer

To add a Volunteer, click on **Sign In-Out** and click on the **Volunteer Module**.

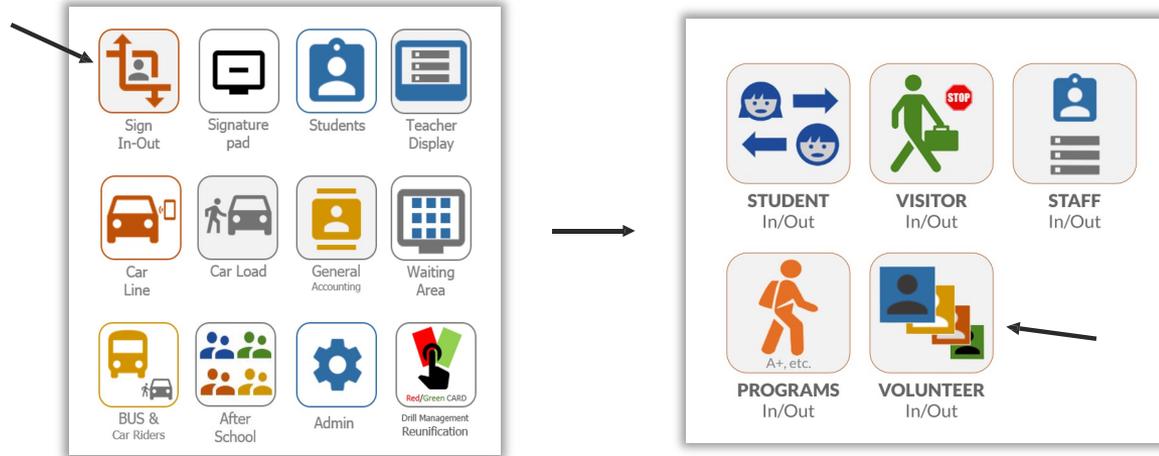


Click on **Volunteer List**.

The screenshot shows the KIDaccount web interface. At the top, there are navigation buttons for 'Home' and 'Back', the 'KIDaccount' logo, and a 'Sign Out' button. Below the logo, it says 'West Coast Academy -' and 'Monday, May 27, 2024'. The main content area has a 'Menu' section on the left with two buttons: 'Volunteer List' (highlighted with an arrow) and 'Generate Reports'. To the right of the menu, there is a date selector 'Select A Date: [input] [View]' and a 'Daily Volunteer Report 05/27/2024'. Below this is a table header with a 'Name' column. On the far right, there are two summary boxes: 'Top 5 Volunteers' listing names and hours (Robert Dickey: 26.5 hours, Mehar Kaur: 17.1 hours, Mehar Kaur: 12.2 hours, Minti Kaur: 11.7 hours, test Dickey: 11.6 hours) and 'Actively Signed-in Volunteers' listing names and 'Sign Out' links (Mehar Kaur, Mehar Kaur, Minti Kaur, Test Kaur, Mehar Kaur, John Smith).

Add a Volunteer

To add a Volunteer, click on **Sign In-Out** and click on the **Volunteer Module**.



Click on **Volunteer List**.

The screenshot shows the KIDaccount web interface. At the top, there are navigation buttons for 'Home' and 'Back', the KIDaccount logo, and a 'Sign Out' button. Below the logo, it says 'West Coast Academy -' and 'Mehar Kaur Monday, May 27, 2024'. The main content area has a 'Menu' section on the left with two buttons: 'Volunteer List' (highlighted with an arrow) and 'Generate Reports'. To the right of the menu, there is a date selector 'Select A Date: [input] [View]' and a 'Daily Volunteer Report 05/27/2024' section with a table header 'Name'. On the far right, there are two summary boxes: 'Top 5 Volunteers' listing names and hours, and 'Actively Signed-in Volunteers' listing names with 'Sign Out' links.

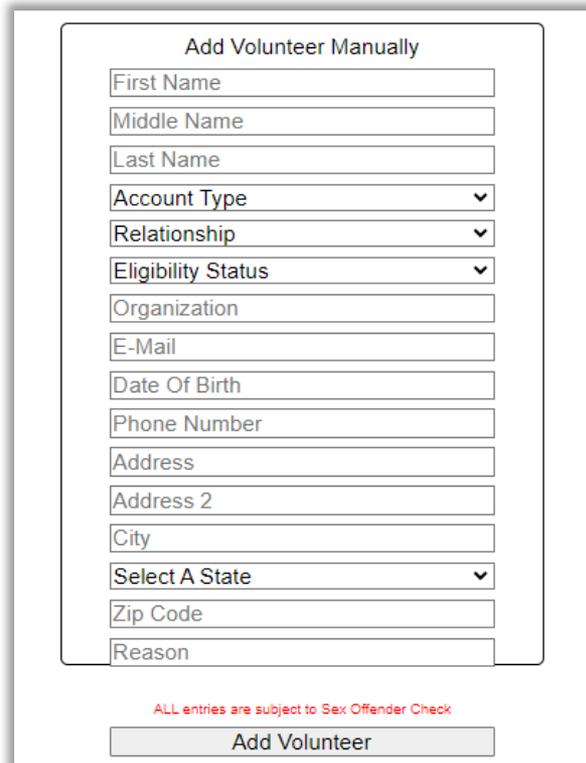
Add a Volunteer

Next, click on **New Volunteer**.



The screenshot shows the 'VOLUNTEERS LIST' interface. At the top, there are navigation buttons: 'New Volunteer', 'Dashboard', 'Volunteer Reports', and 'Export CSV Reports'. Below these is a search bar with 'Search By Last Name' and a 'Search' button, and a 'Full List' button. There are also 'Previous 50' and 'Next 50' buttons. A table below shows a list of volunteers with columns: Volunteer Name, Image, Status, Expiry Date, Notes, and Actions. One row is visible with 'test test' in the name, an image icon, 'Active' status, '2021-10-21' expiry date, and two action links: 'View Time Report' and 'Volunteer Profile'. An arrow points from the text above to the 'New Volunteer' button.

Fill out the volunteer information and click **Add Volunteer**.



The screenshot shows the 'Add Volunteer Manually' form. It contains the following fields and dropdowns:

- First Name
- Middle Name
- Last Name
- Account Type
- Relationship
- Eligibility Status
- Organization
- E-Mail
- Date Of Birth
- Phone Number
- Address
- Address 2
- City
- Select A State
- Zip Code
- Reason

At the bottom, there is a red warning: 'ALL entries are subject to Sex Offender Check' and an 'Add Volunteer' button.

Volunteer Profile

Once you add a volunteer, you will be redirected to the **Volunteer Profile Page** where you can upload volunteer pictures, print volunteer passes, or view detailed reports.

Samantha Jones

- Change Picture
- Print Volunteer Pass
- Disable Volunteer
- NSOR SCAN
- Take Picture
- View/Edit Notes
- Manual/Bulk Time Entry
- Detailed Time Report
- Back To Volunteer List

First Name

Middle Name

Last Name

Account Type

Relationship

Eligibility Status

Organization

E-Mail

Date of Birth

Phone Number

Address

Address 2

City

State

Zip Code

Expiry Date

Group Account:

ALL entries are subject to Sex Offender Check

Volunteer Reports

To view specific reports by date, program and school, go to **Generate Reports** from the Volunteer Module page.

The screenshot shows the KIDaccount interface for West Coast Academy. At the top, there are navigation icons for Home and Back, the KIDaccount logo, and a Sign Out button. The user is logged in as Mehar Kaur on Monday, May 27, 2024. A 'Menu' section on the left contains 'Volunteer List' and 'Generate Reports', with an arrow pointing to the latter. The main area shows a 'Daily Volunteer Report 05/27/2024' with a table header 'Name'. On the right, there are sections for 'Top 5 Volunteers' and 'Actively Signed-In Volunteers'.

Use the filters at the top to narrow down your search results and click **Generate Report**.

The screenshot shows the 'Volunteer Report' page. At the top, there are filters for 'Start Date: mm/dd/yyyy', 'End Date: mm/dd/yyyy', 'Filter by Program: Select ALL Programs', and 'Filter by School: Select ALL Schools'. A 'Generate Report' button is highlighted by an arrow. Below the filters, there is a table titled 'Total Time Volunteered:' with columns for 'Volunteer' and 'Hours'.

Volunteer	Hours
Keith Petty	0.5
Mehar Kaur	6.75
Mehar Kaur	8.25

THANK YOU

This concludes the Visitor Management – Volunteer Module user guide.

Please contact us with any questions.

CustomerService@kidaccount.com

Thank you for choosing KIDaccount.

