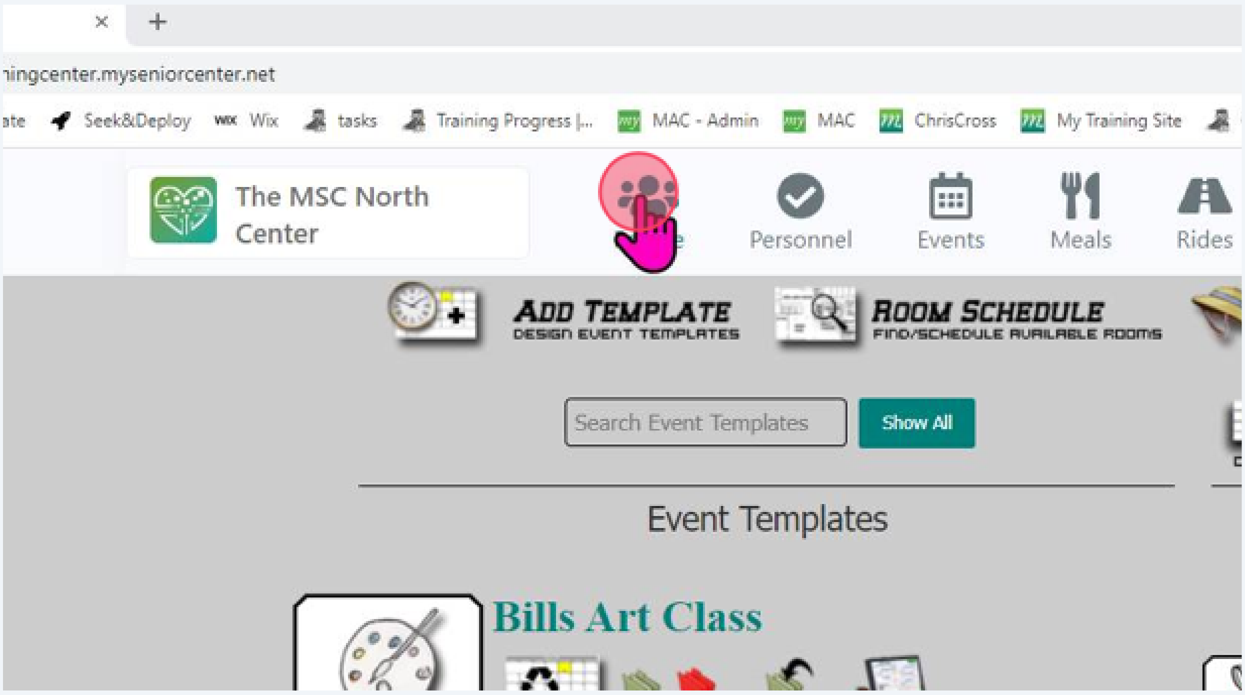
MSC Training 01 - People and Their Data

In this training, we will review:
• Overview of the program showing all sections that are offered
• Managing and adding participants
• Standard and custom fields
• Adding photos
• Managing various drop-down menus (categories and types)
• Equipment Rental/loans
• Managing System Preferences and Touchscreen Settings
• Managing Volunteers, Instructor and Drivers

Adding and Updating People

1 After Logging in, Click "People"



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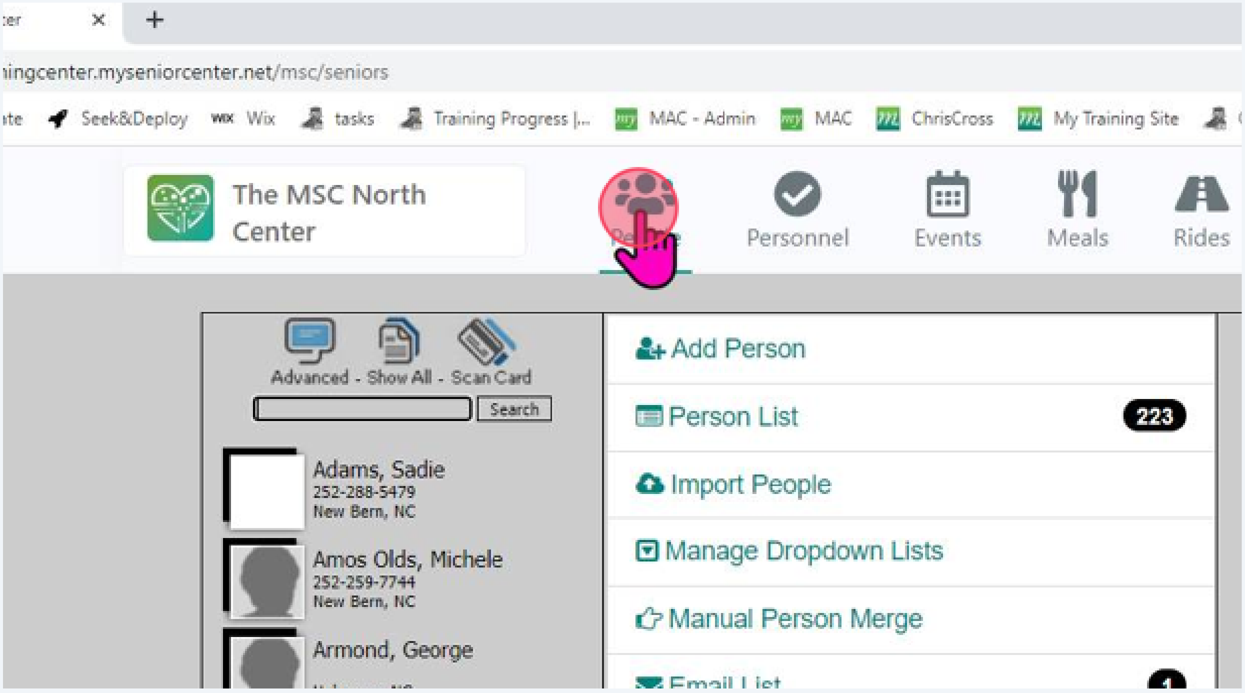
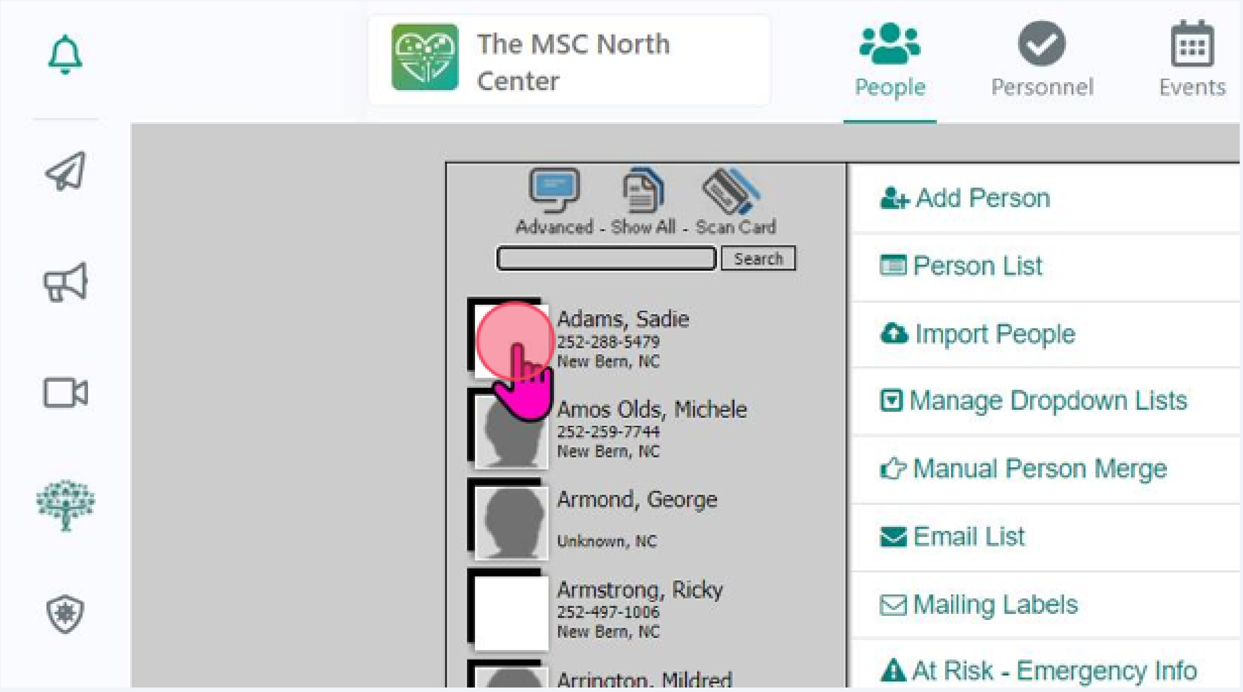
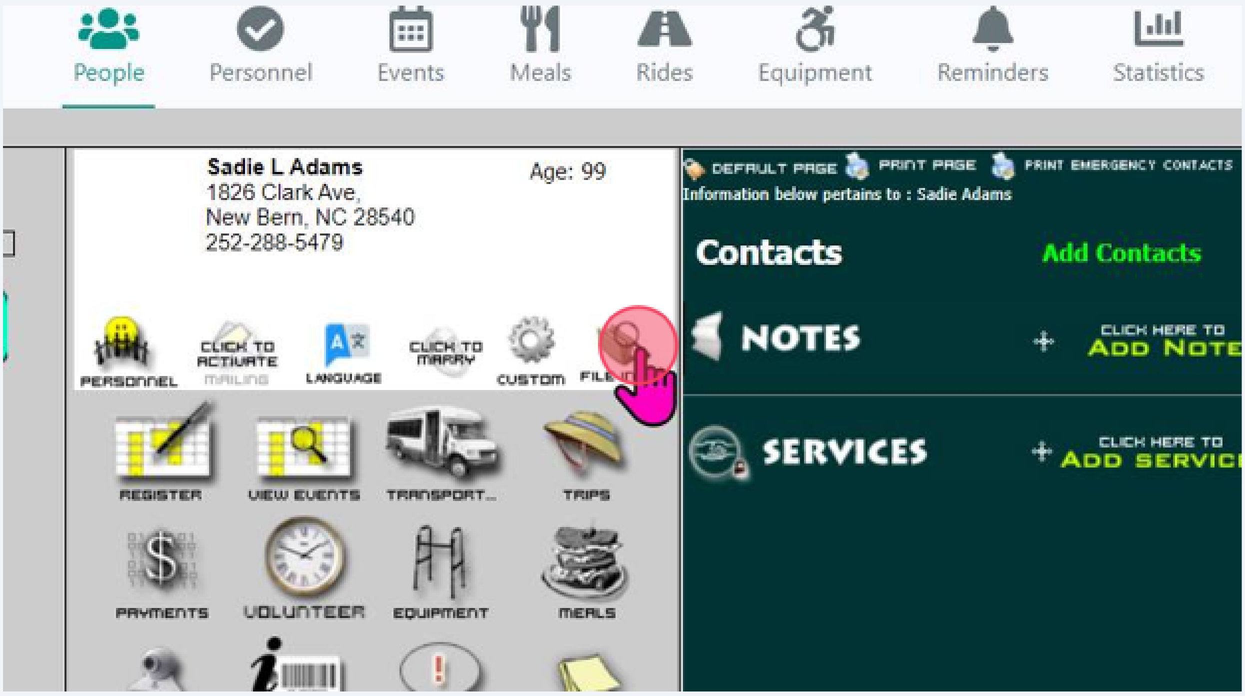
The people tab is your filing cabinet. Anybody and everybody that you're tracking in MySeniorCenter will have a file under the people tab. It doesn't matter if they are a participant, volunteer, instructor, etc. Everyone has a record in the people tab. When you 1st come to the people tab. You'll see a short list of people at a time. The people are alphabetically ordered and if you wanted to you could click the arrows down at the bottom of the list to go through the pages alphabetically. Normally you'll use the search box at the top of the list . You can search by first name, last name, middle name and nickname. You can also search by address, phone number, email address and zip code.



3 Click a Person



4 When you click on a person you're selecting that person's file and you'll see that person's information in the center pane. To get into that person's file click "File Info".



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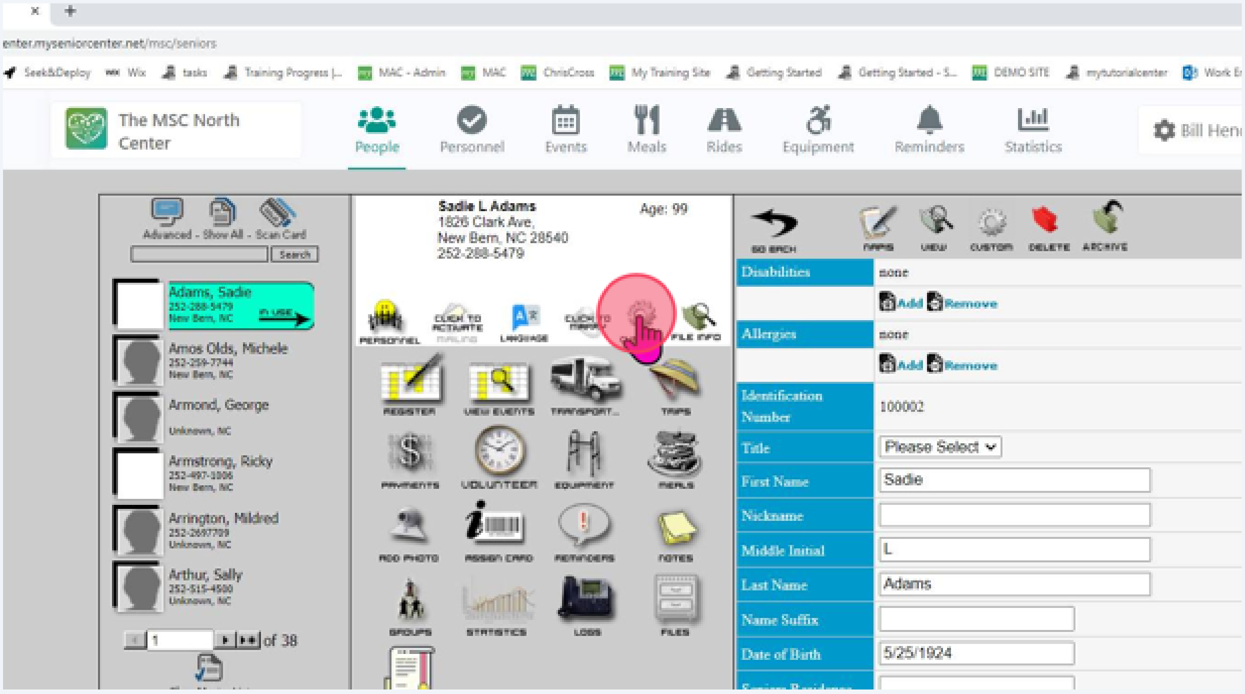
That opens up that person's file on the right hand side. That's our standard fields area in MSC. All centers that use MSC have the same exact fields here. This is what comes with MSC when any center starts using it. You'll see when entering a new person that it is not all required. Even if all you have is a person's name you can get them into MSC. Standard fields other than First and Last name can be ignored but they cannot be removed from MSC. To the left of the file Info Icon you'll find the Custom Icon. Click it.

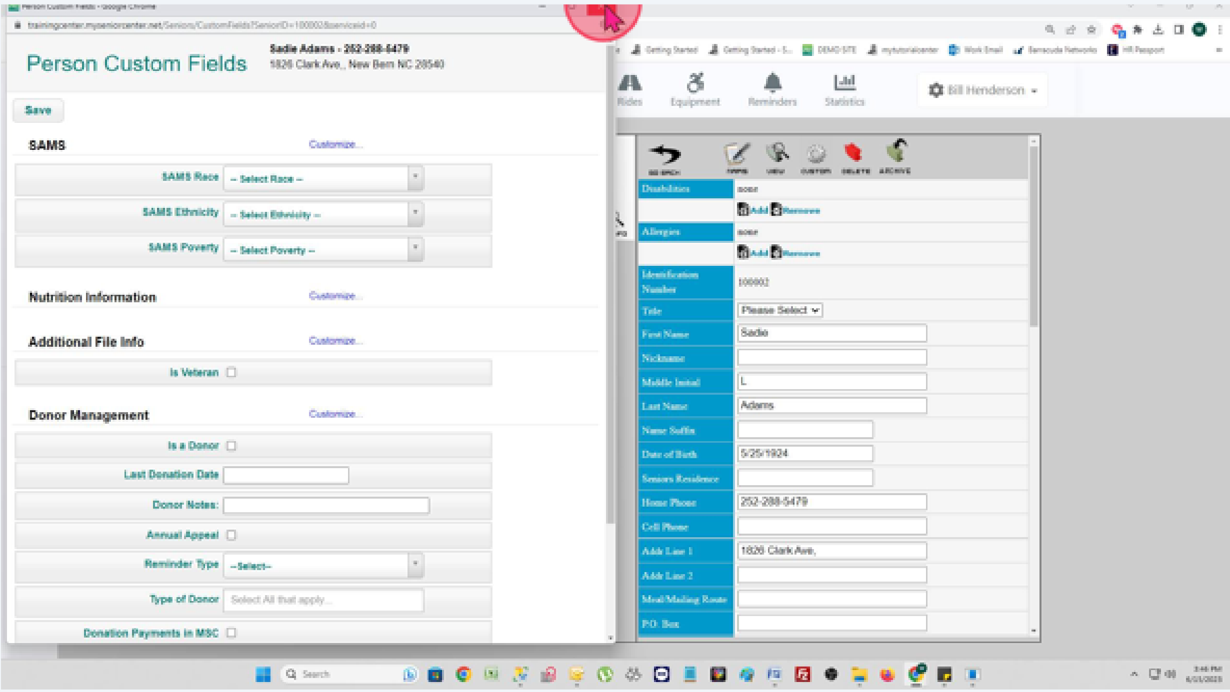


6

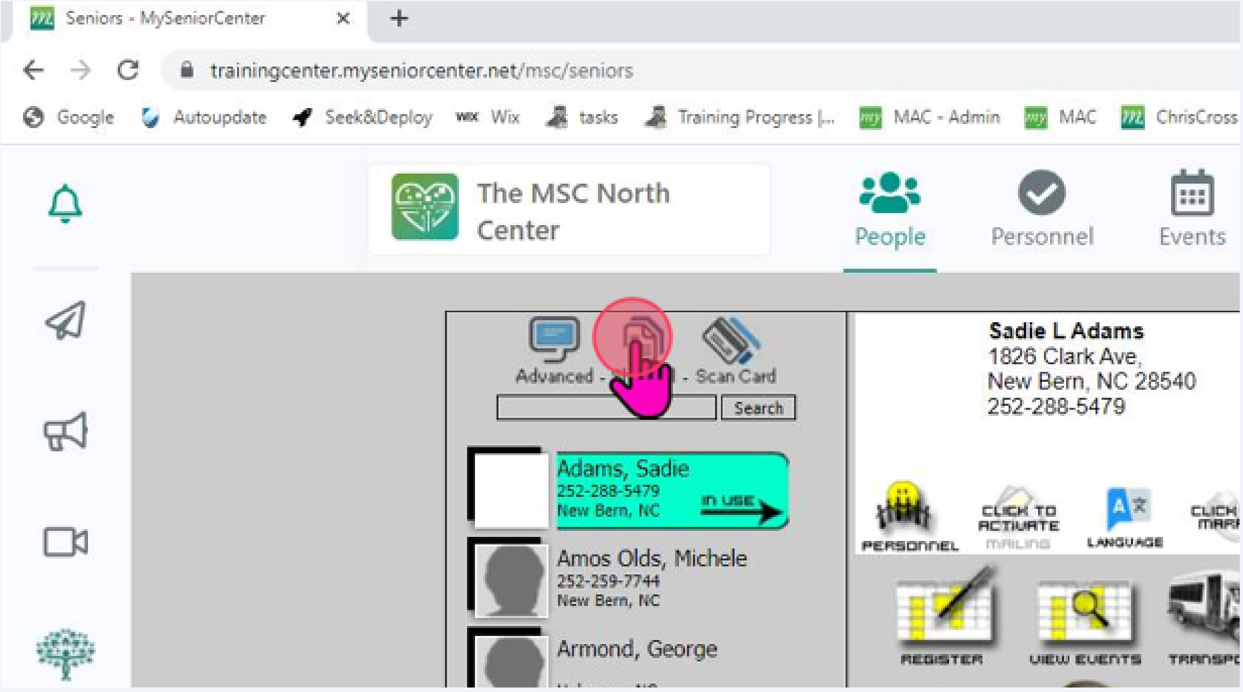
That opens the custom fields window. You're doing the same exact thing here, just entering in information about the person but we call it the custom fields area because you can customize this section. Whenever a new customer sends us their data to get started with we will always build custom fields for anything that falls outside of what we have for standard fields but you will always have the ability to add more custom fields if anything new ever comes up that you need to start tracking. Click any customize link to add sections and fields to MSC. You can create drop down menus, multi-select menus, text fields, date fields and check boxes.

File info and custom fields are your two primary data areas in the program. Most information you collect on folks is going to be in one of the two spots. These are always separate sections so best practice is, when looking up information on a person, go to file info first then custom fields and you'll have everything on one screen.

Close the custom fields window.

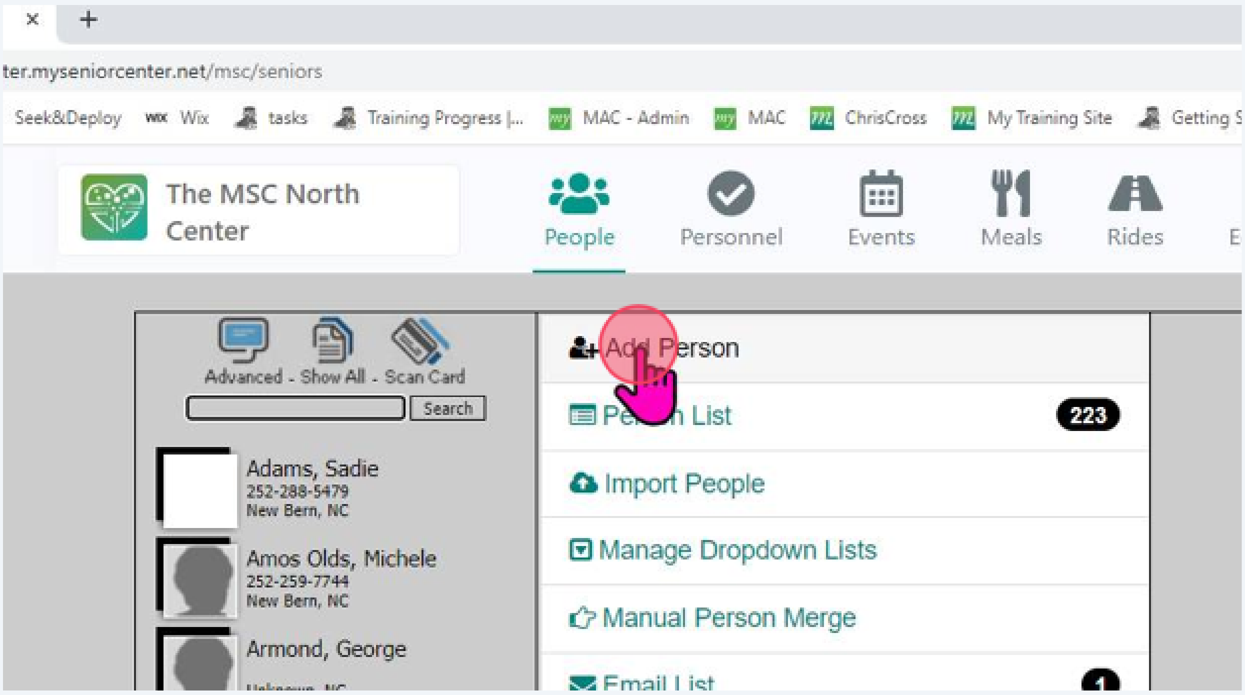


7 Click Show all above the search box. This always clears the search results and bring back all of the icons in the center pane.



8 Click " Add Person"

Remember, it doesn't matter who the person is yet. Everyone gets added the same way. Once added you can indicate things like , volunteer, driver, instructor, etc.



9

You'll get a pop-up window. The only thing MSC will force you to fill in is the first name and the last name. Everything else is optional but does serve a purpose.

• The nickname is for the touch screen. Whenever anyone checks in at the touch screen it says their first name on the screen. If you fill in a nickname it will use their nickname.

• Birth date is use for statistics. You will be able to see how many people are in different age groups and use the DOB as a filter when running any statistic. MSC also has a birthday list. With just a couple clicks you get a list of everyone that has a birthday in whatever month you chose then you can send out a broadcast call, text or email and even print out mailing labels for birthday cards.

• Filling in a phone number will allow you send out broadcast calls. Phone numbers can be formatted in any way.

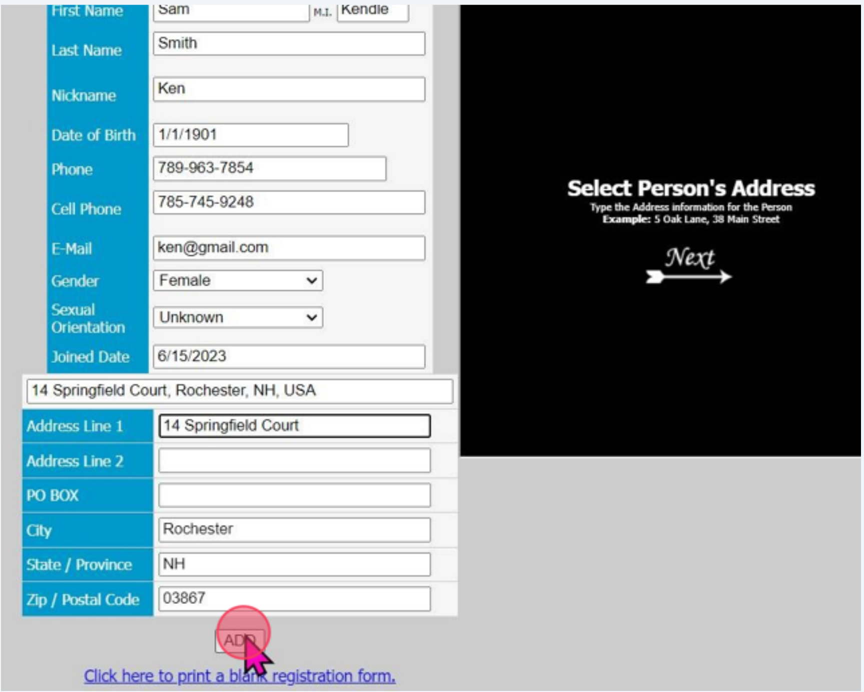
• If you fill in a cell phone number then the broadcast calls go to both numbers.

• If you fill in only one or the other then broadcast calls go to whichever one you filled in. It is perfectly file to leave the phone spot blank if the person only has a cell phone.

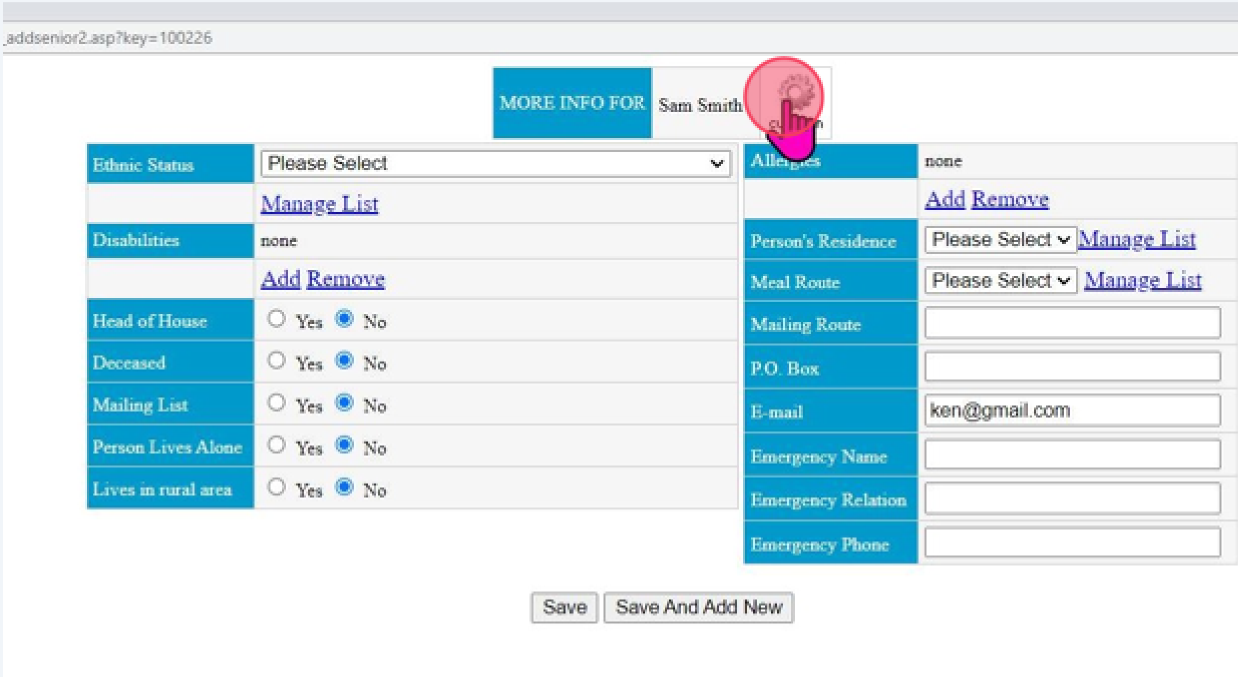
• Email will allow you send out email broadcasts as well.

• Entering a person's address will allow you to print mailing labels. Statistics will show how many people are coming from each city.

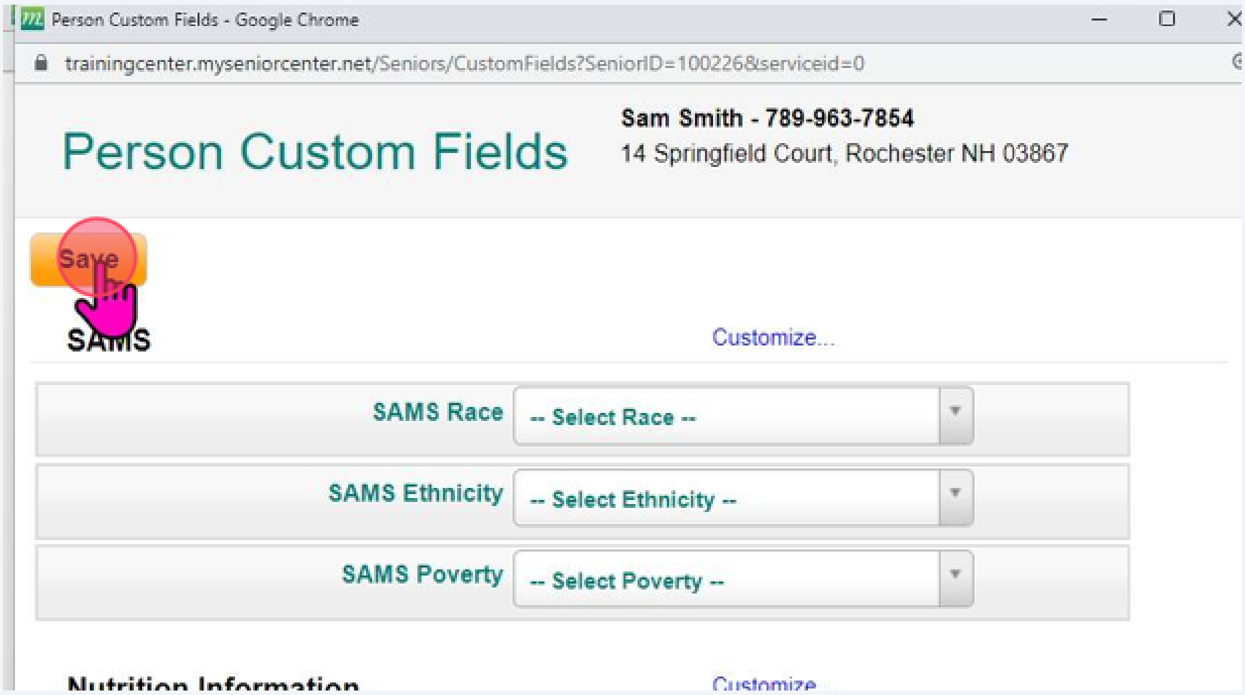
Click "Add" to go to page two.



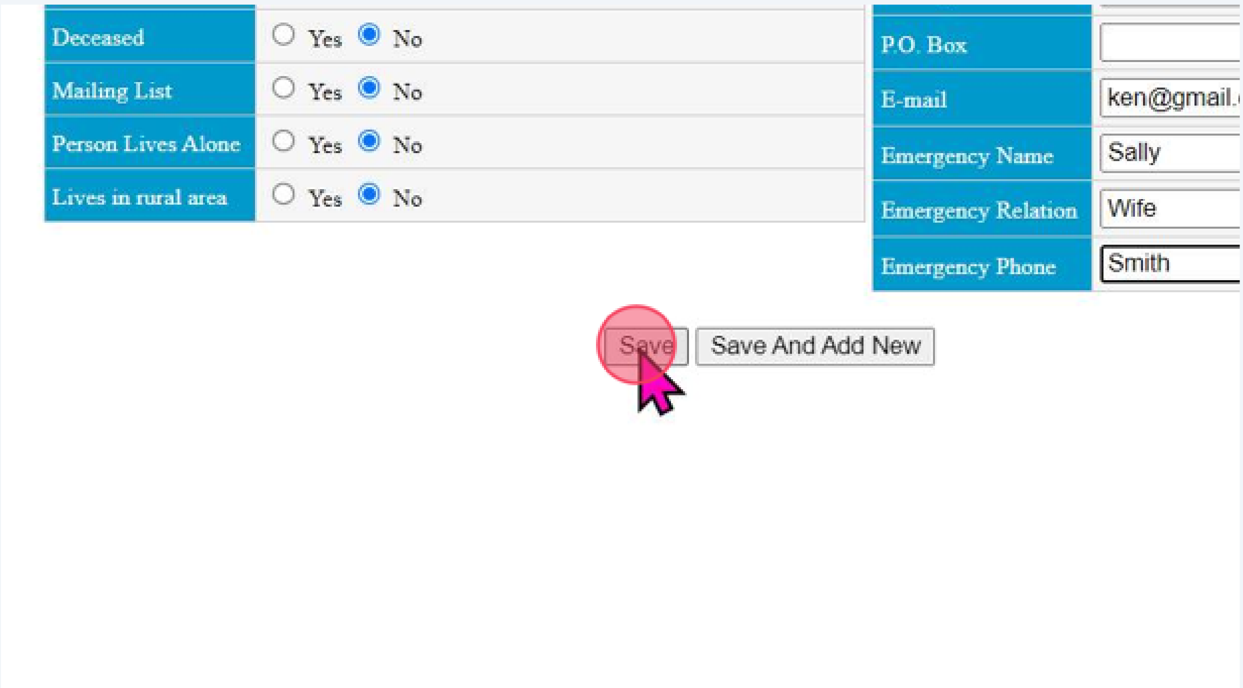
10 Everything on page two is optional but it all does serve a purpose. Things like Ethnic Status, Disabilities, Allergies, Head of Household, lives alone all pull to the statistics. Disabilities and Allergies also pull to the emergency contact sheet. We also want to fill in their primary emergency contact info. You will also be able to enter additional contacts later. Click Custom if you wish to enter any custom field data.



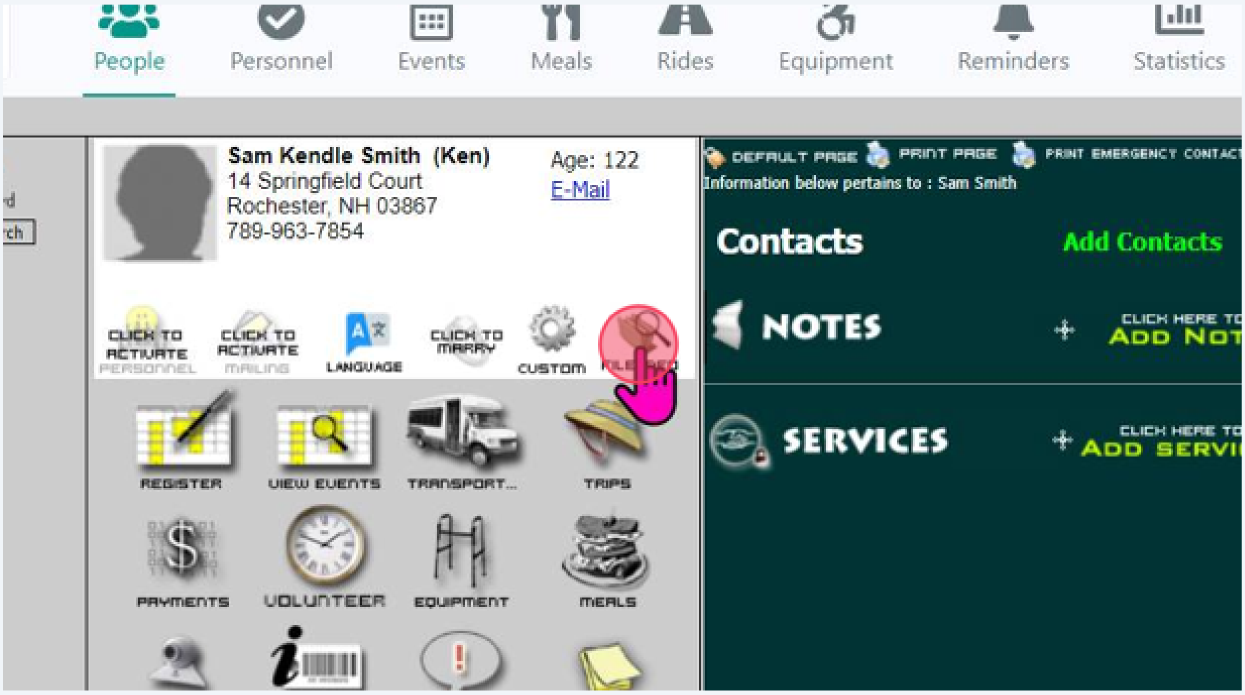
11 Be sure to click save before closing the custom fields window.



12 Click "Save" when finished.

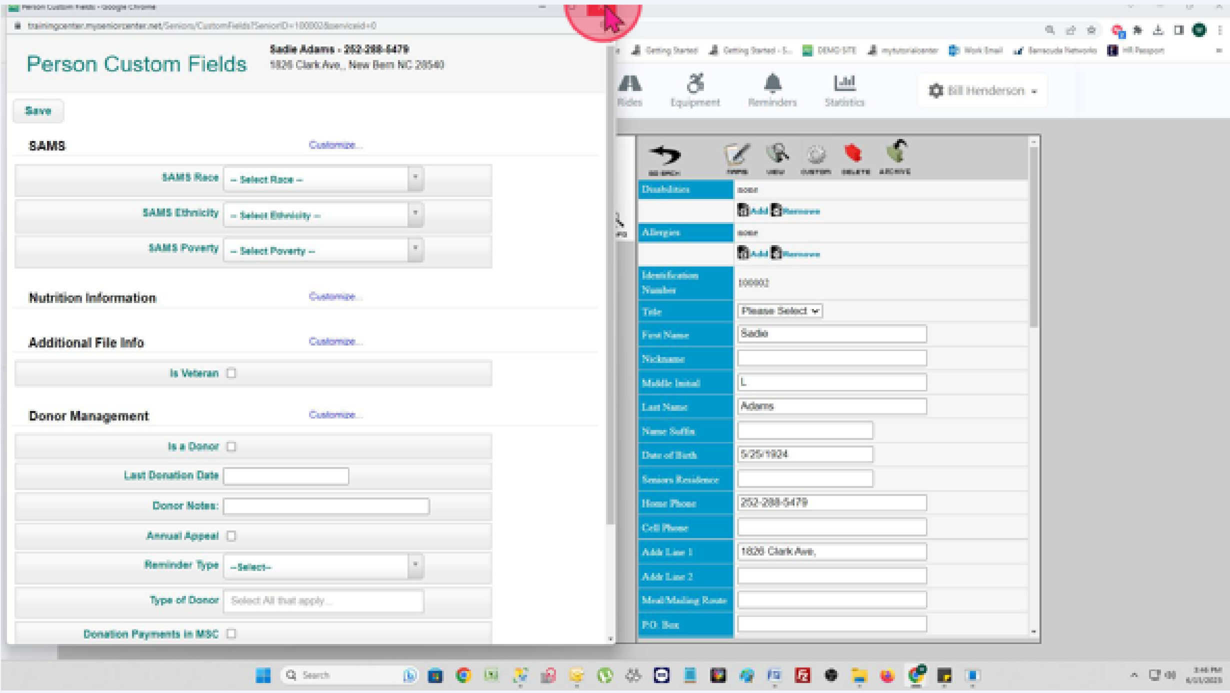


13 The window will close and the new person will be selected right away so you can continue on with the rest of the steps.



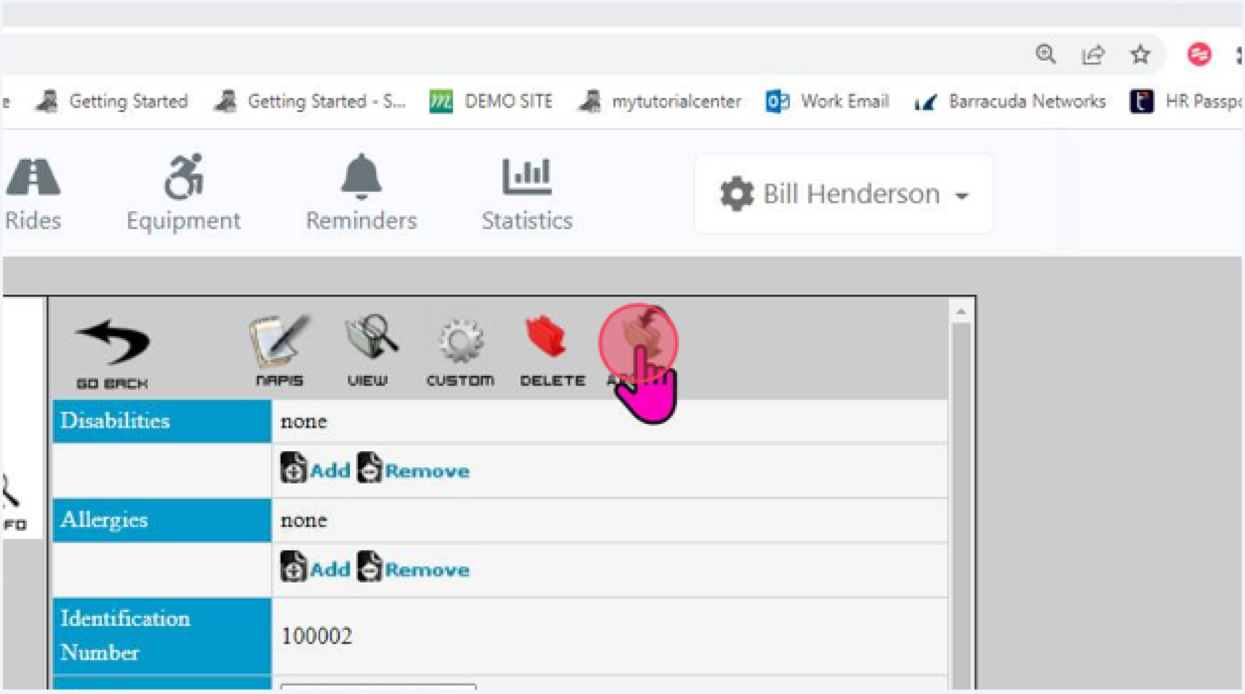
14 Everything we just added will be in File info and Custom Fields. Nothing is set in stone. Anything can be edited from file info or custom fields at any time.

Close the Custom Fields Window



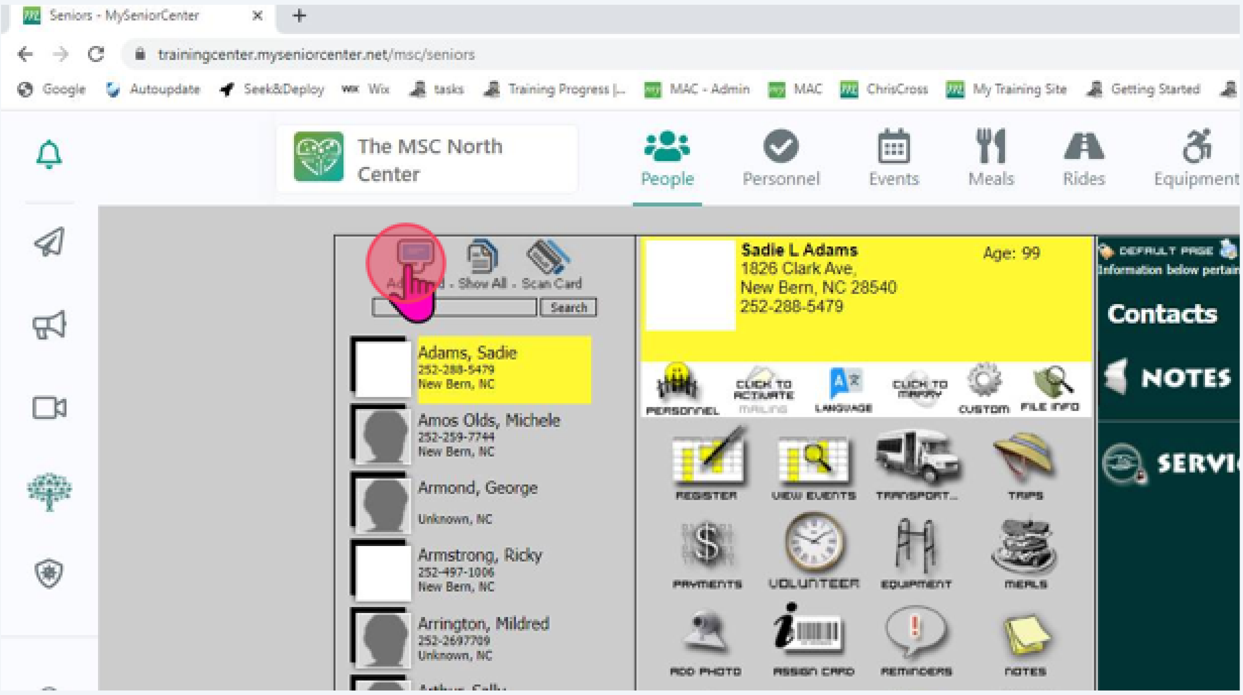
Deleting, Archiving and the Deceased Setting

15 In my senior center you're never really deleting a real person who has attended the center. When we delete someone it's like taking their file out of the filing cabinet and throwing it in the shredder. In my senior center. We have much better ways to handle the different situations that come up where you might think you should delete a person. For example, Maybe you found a duplicate record. You wouldn't want to just pick one to delete because there may be important information on one that's not on the other and vice versa. We have a way to merge duplicate records together so there's no need to delete one and lose important information. So in that situation you would not delete. If a person is no longer active at the center you can archive their file if you want to. When you archive someone's file you're not losing any information on them. If you were to look at a past roster for an activity that they attended on a specific date they're still going to be on that roster. If you run a report for a time period in which they were active they're still going to show up on that report. We're just giving ourselves the ability to hide their file away.

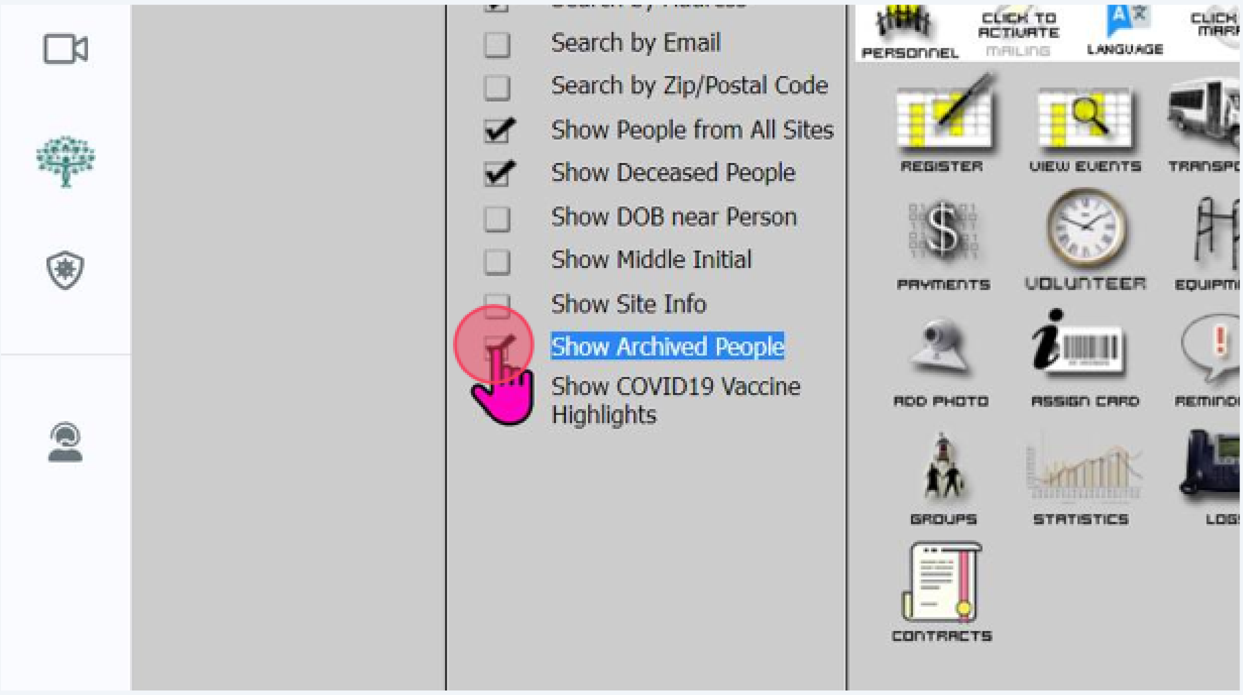


16 When you click archive and then confirm, the person will be highlighted yellow. Yellow means archived.

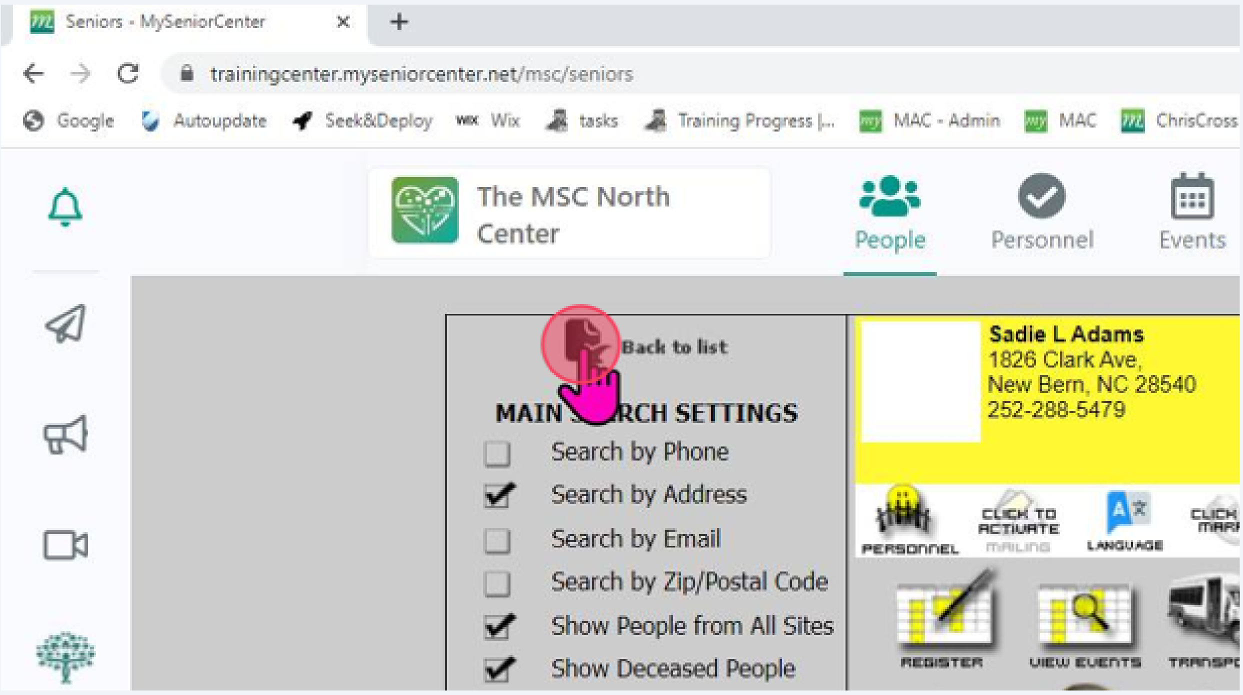
17 Now that the person is archived, click "Advanced" above the search box



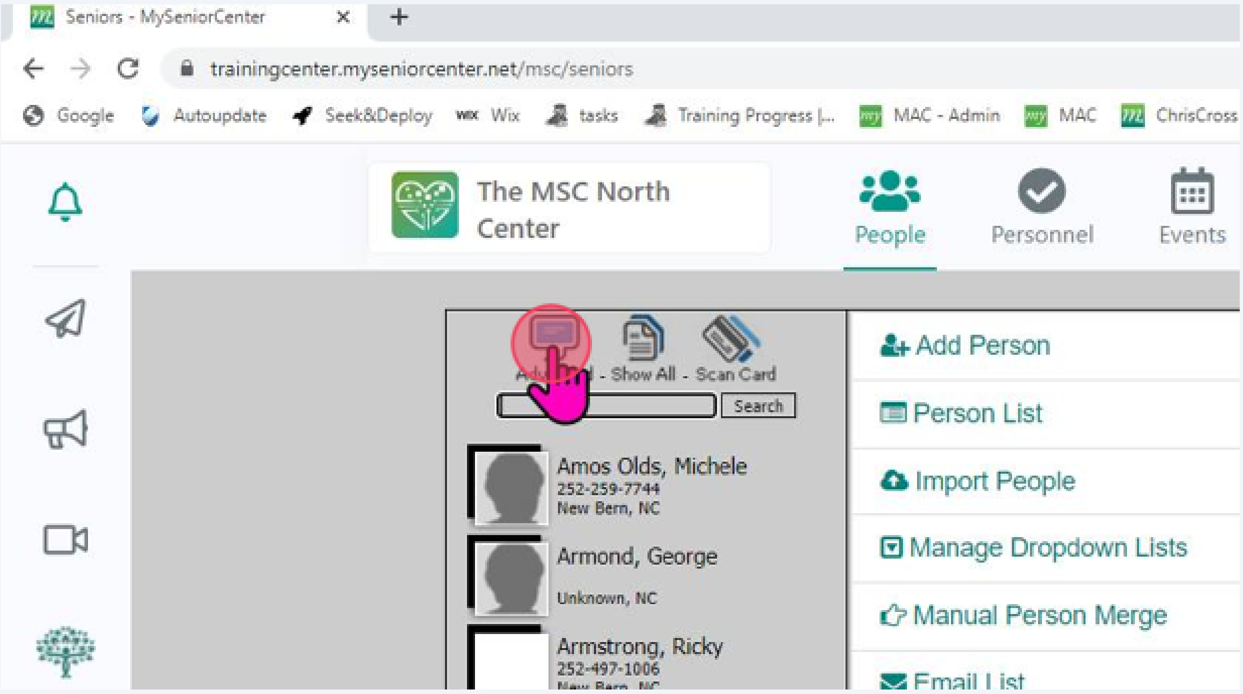
18 Here you can un-check "Show Archived People"



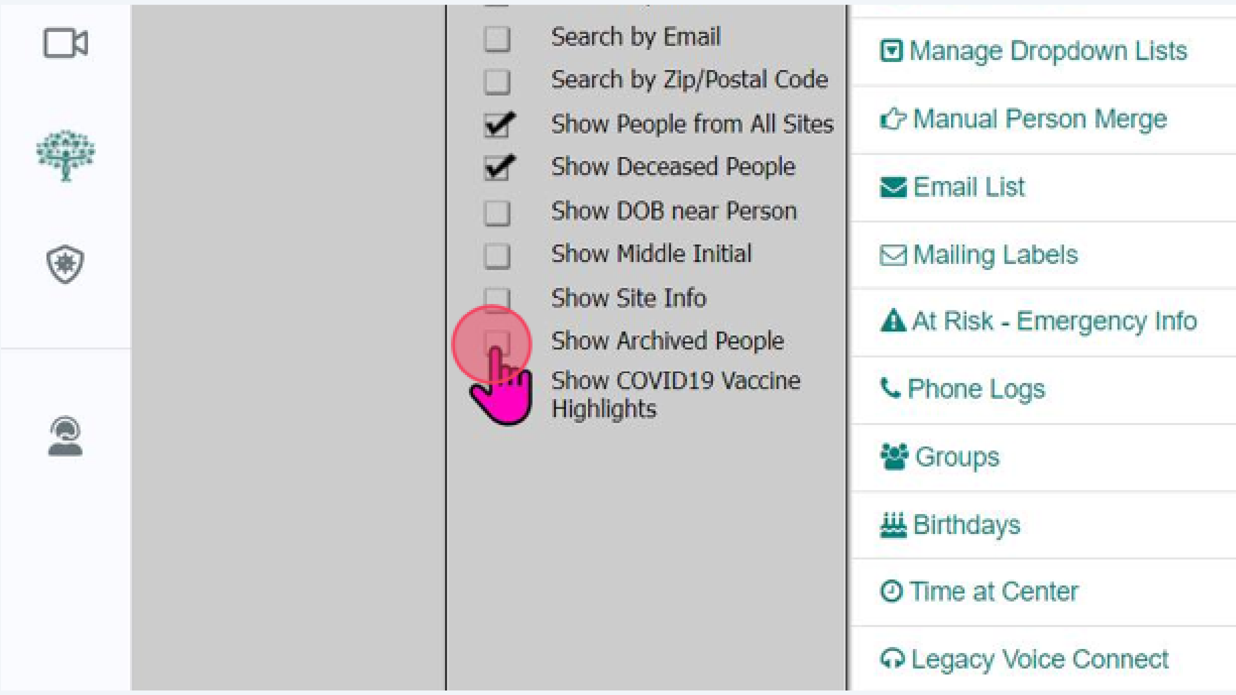
19 Click "Go Back to List"



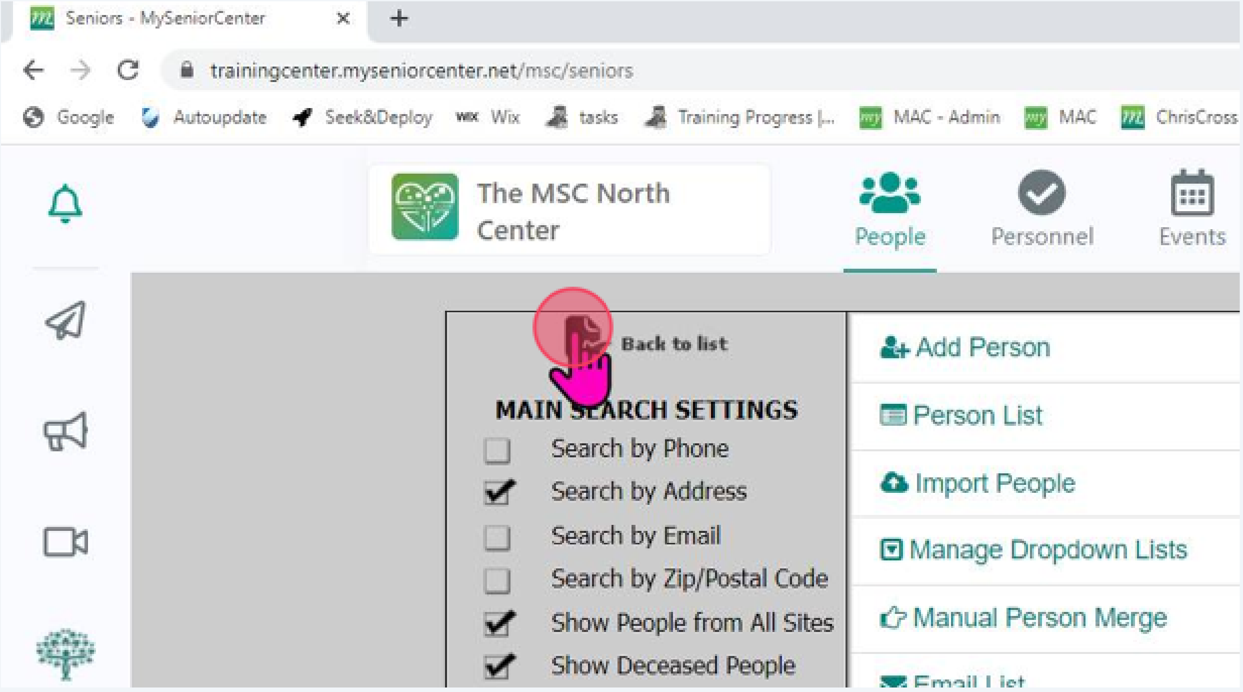
20 Now the person is hidden. They still exist and we have not lost anything. They are just hidden. Click "Advanced" above the search box again.



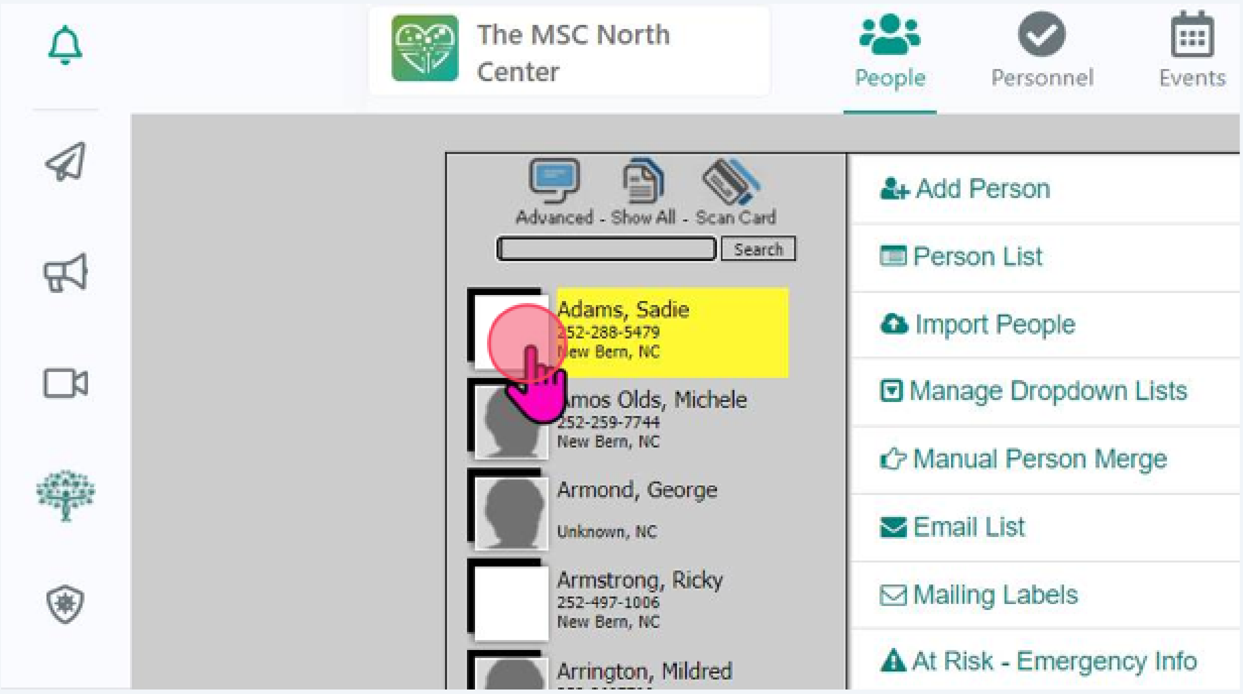
21 Here you can re-check the box



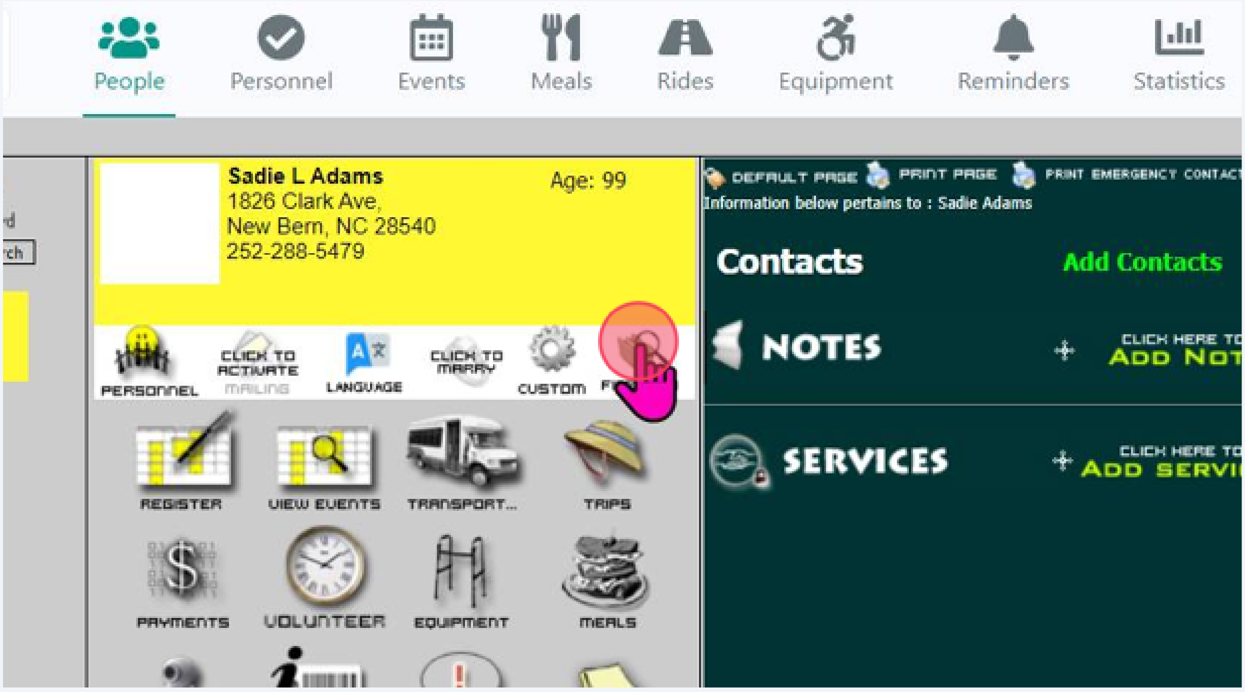
22 Click "Back to List"



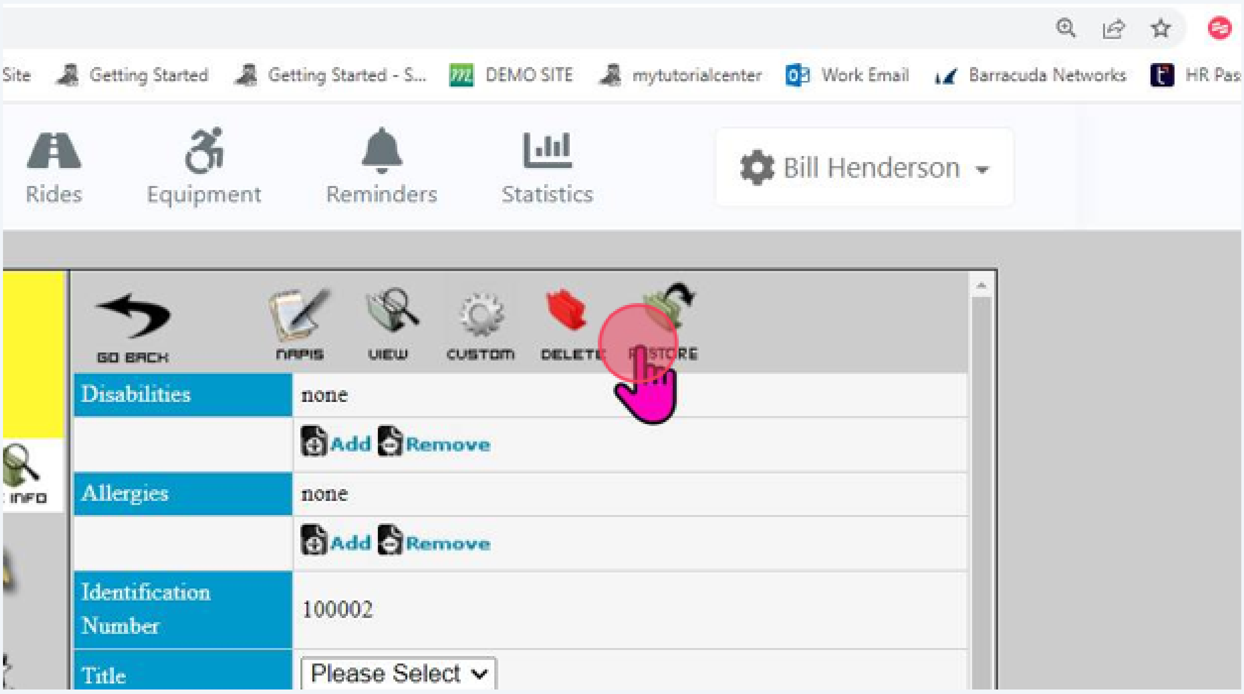
23 The person show's back up in list. Click the person.



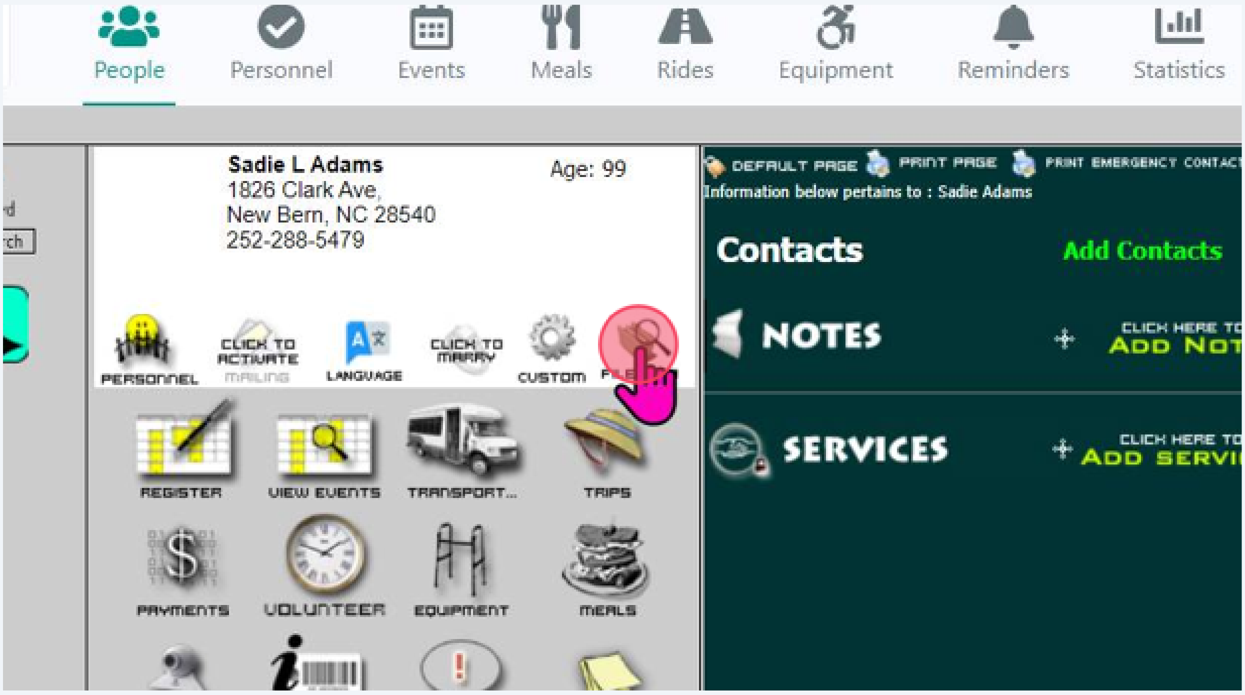
24 Click "File Info"



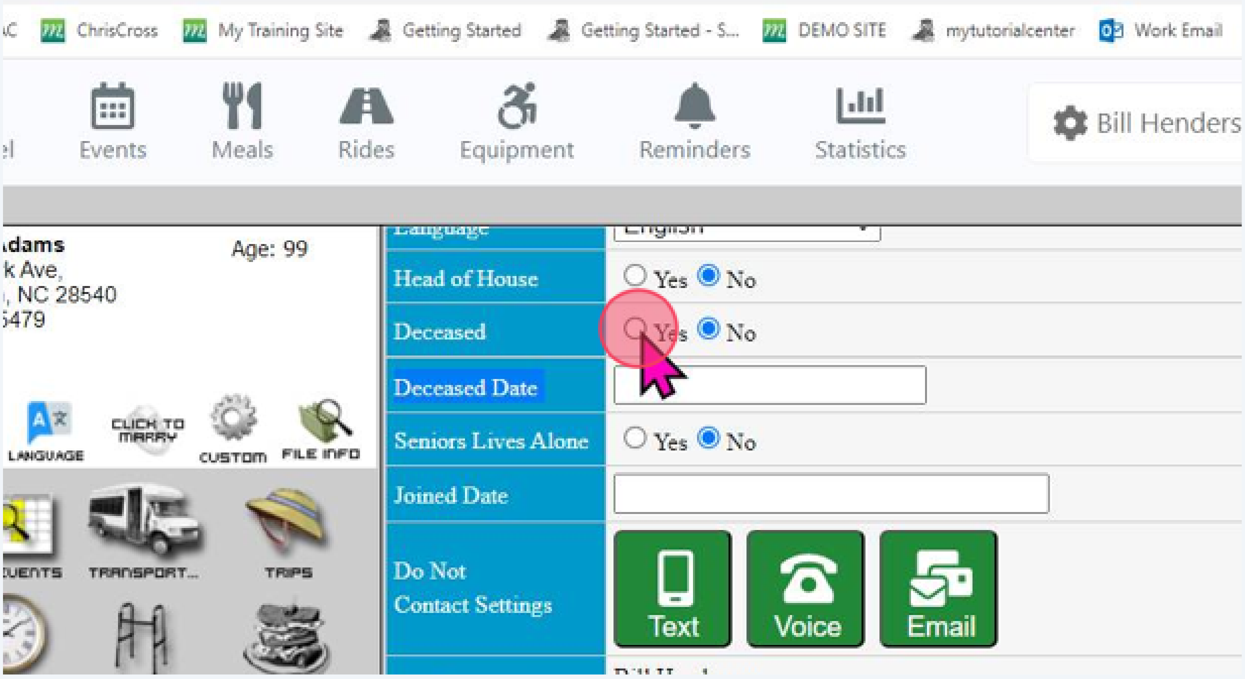
25 Now the icon says Restore. Click "Restore"



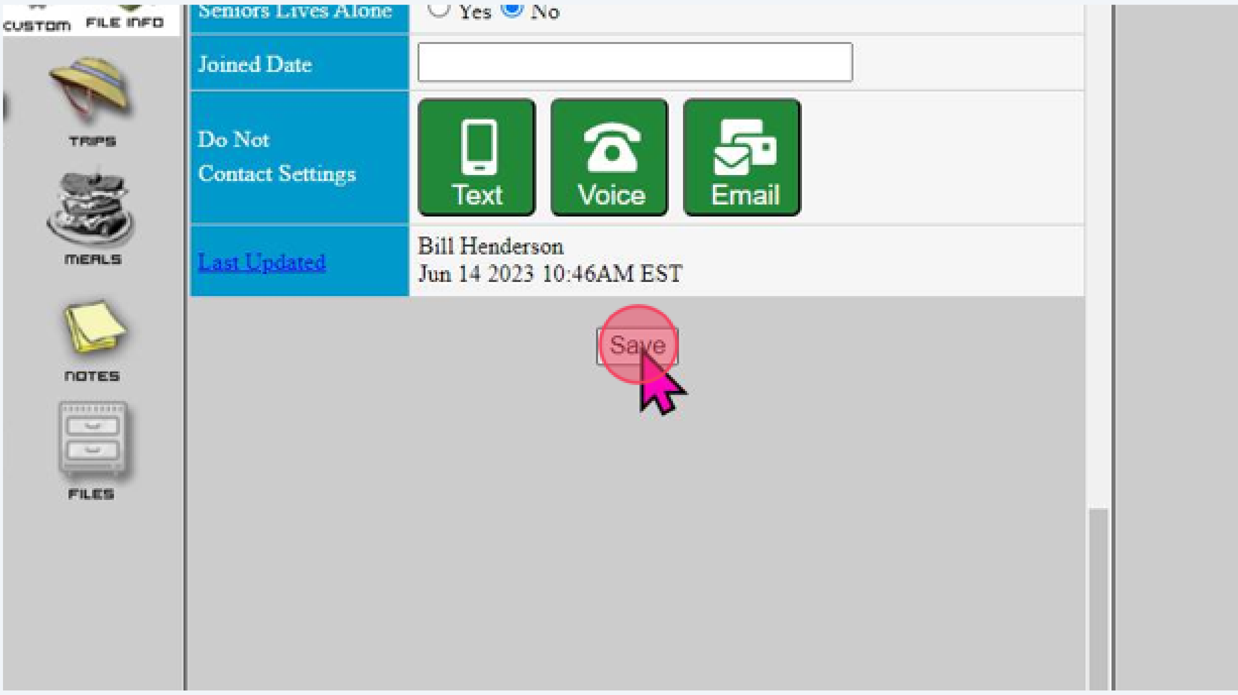
26 The person's file is no longer archived and no longer highlighted yellow.



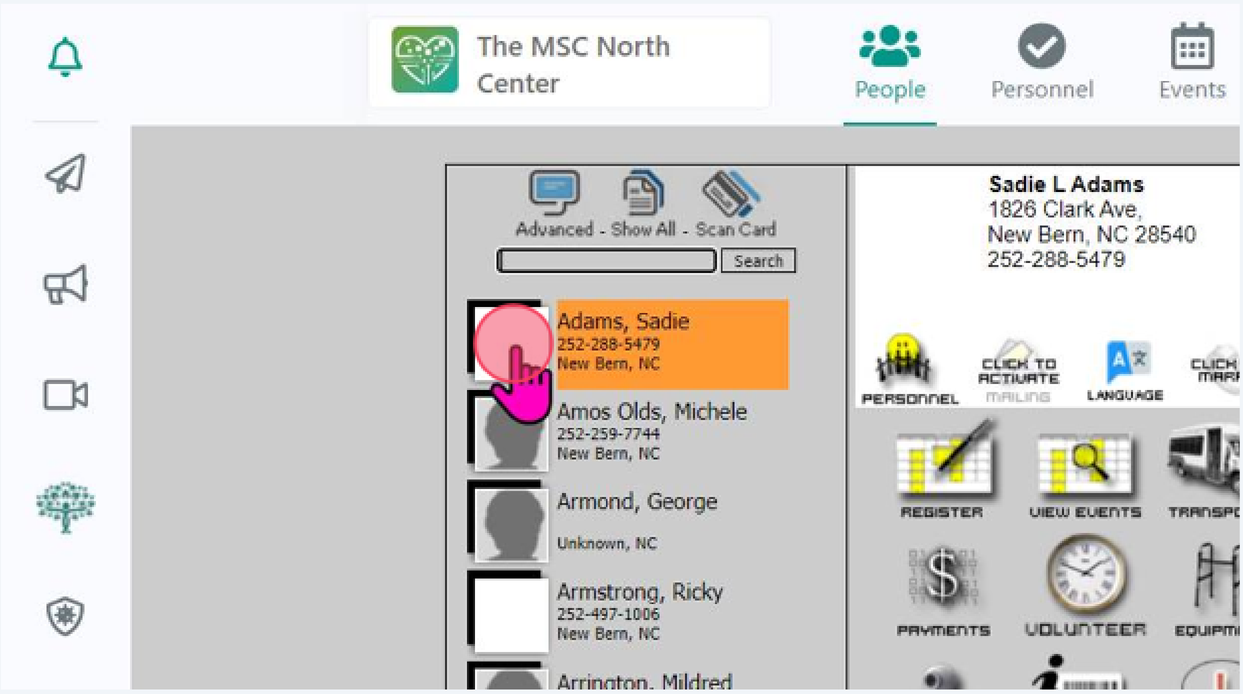
27 The deceased setting is similar to the archived setting. The date is not required. Change to Deceased to "Yes".



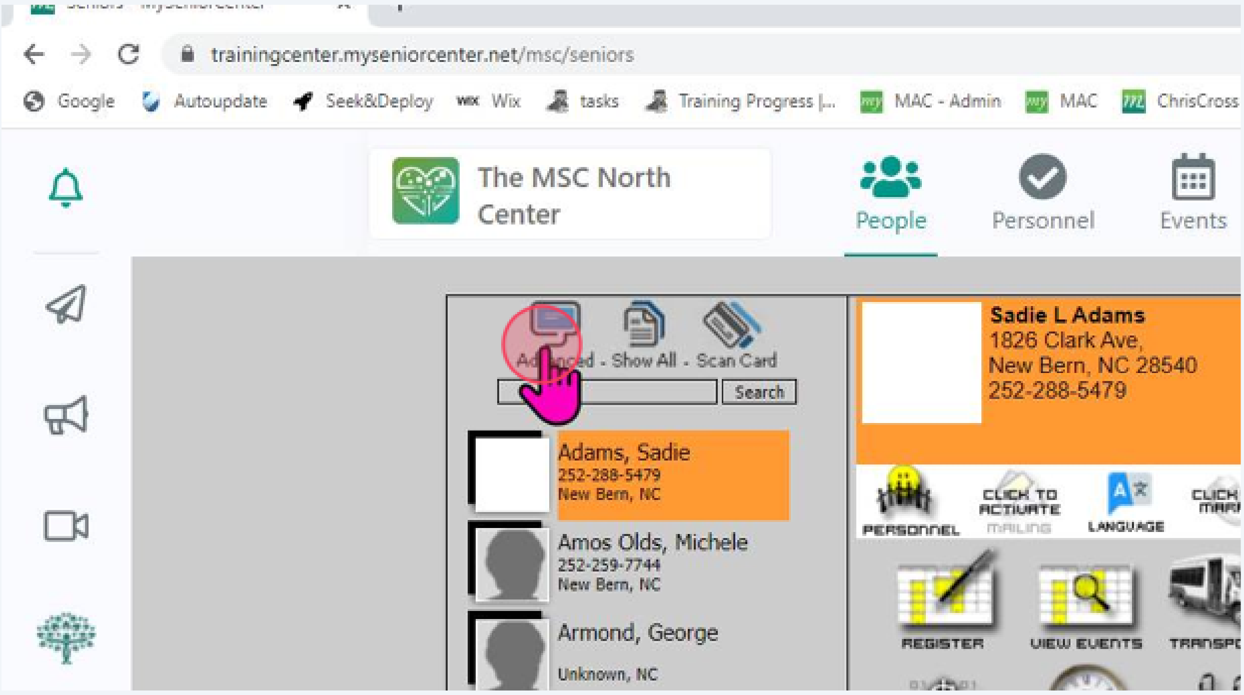
28 Click "Save"



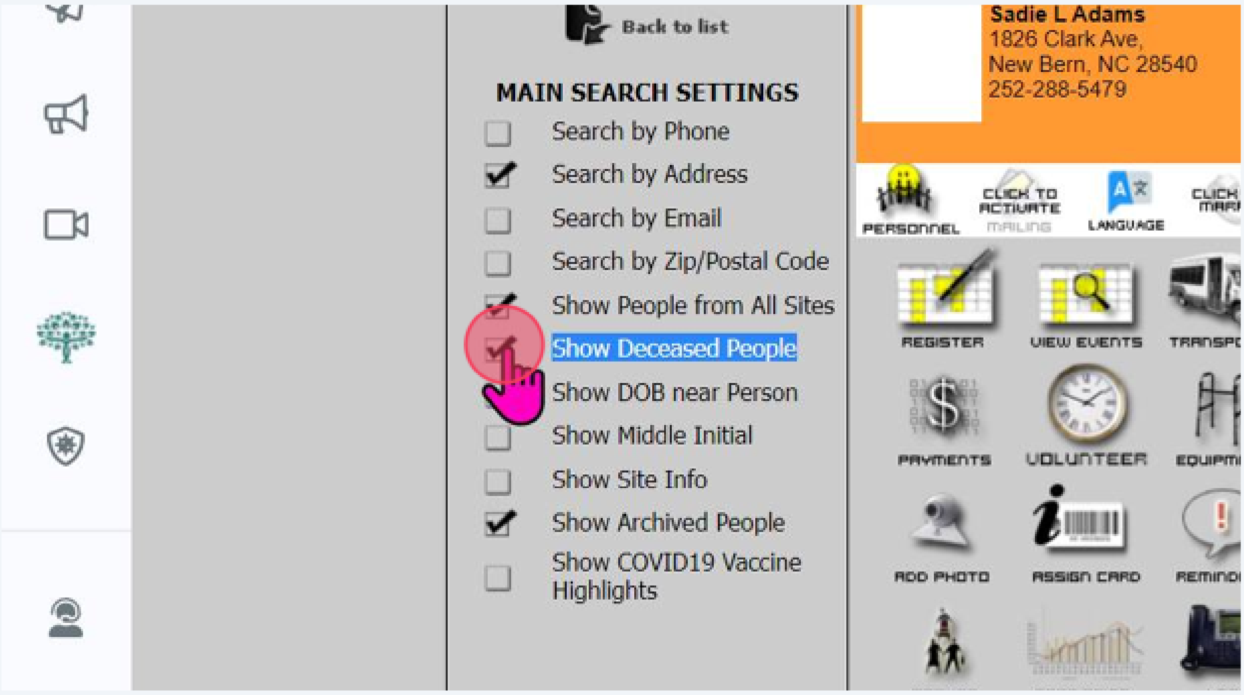
29 The person's file is highlighted orange. Orange means deceased.



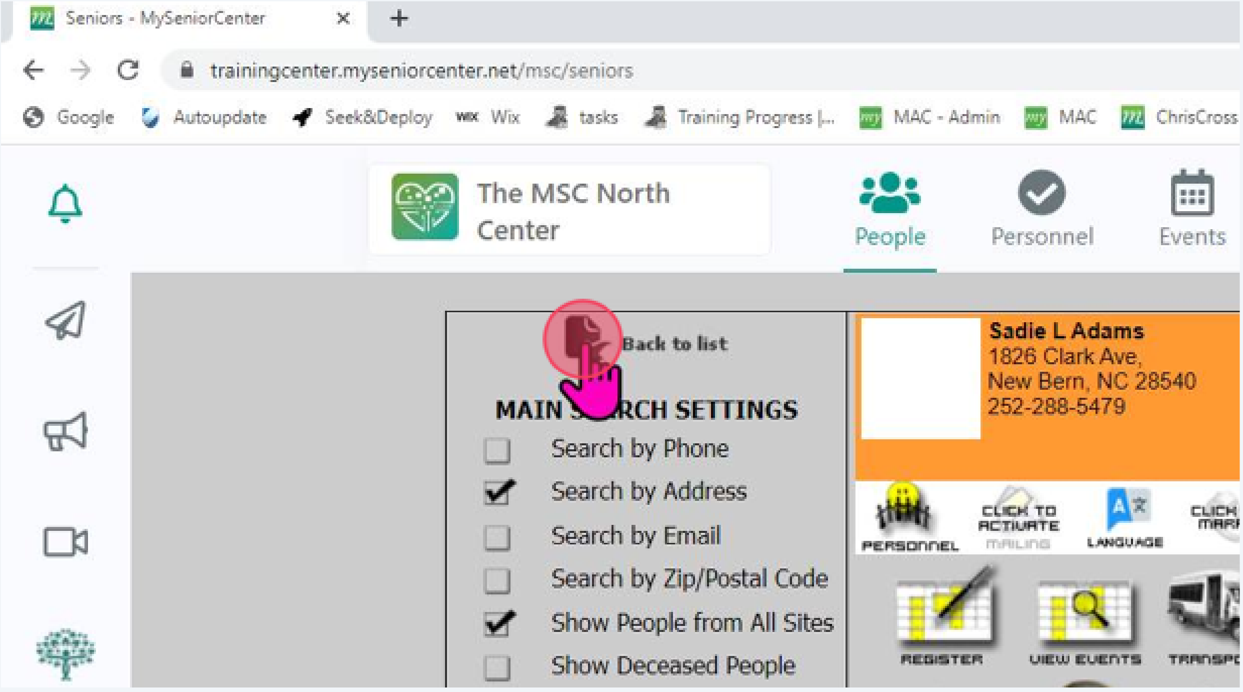
30 Click "Advanced" above the search box



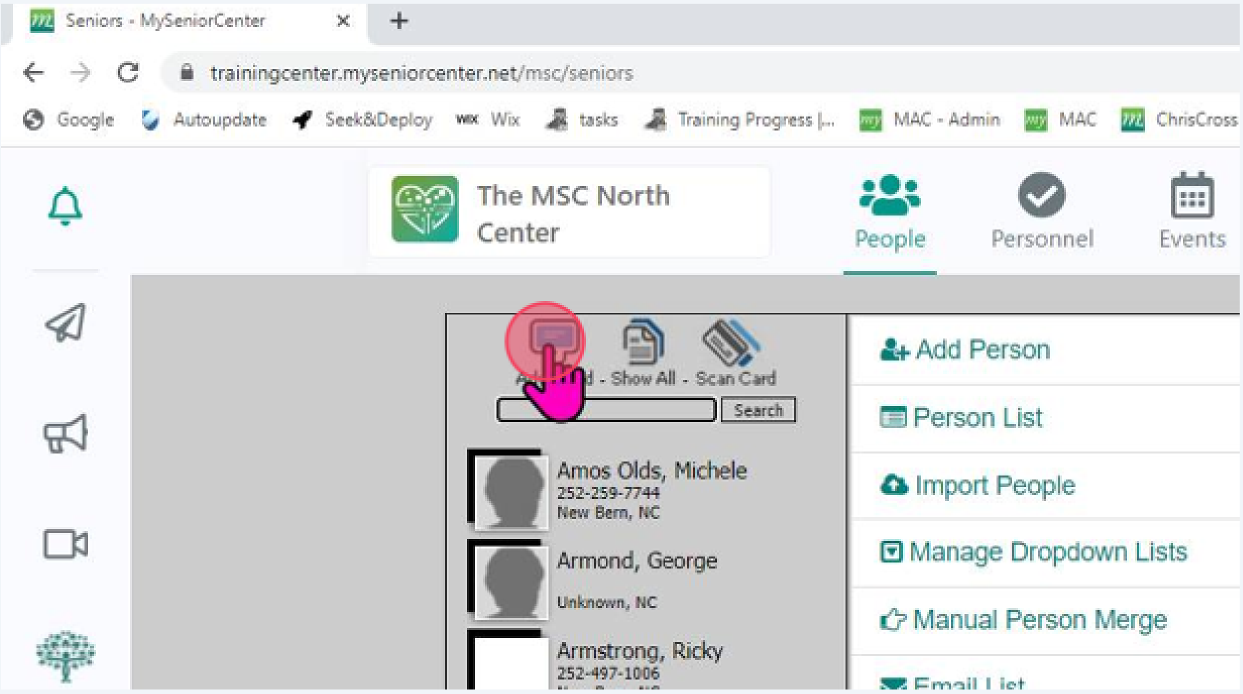
31 Just like with archiving, uncheck "Show Deceased People".



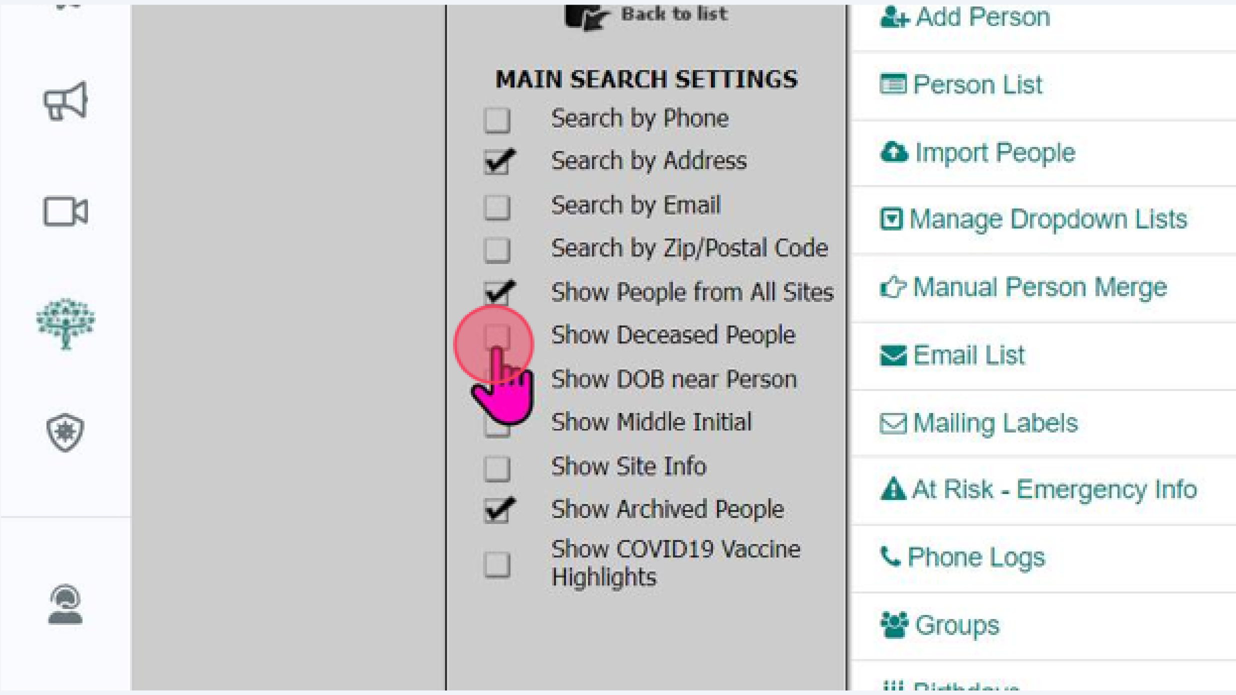
32 Click "Back to List"



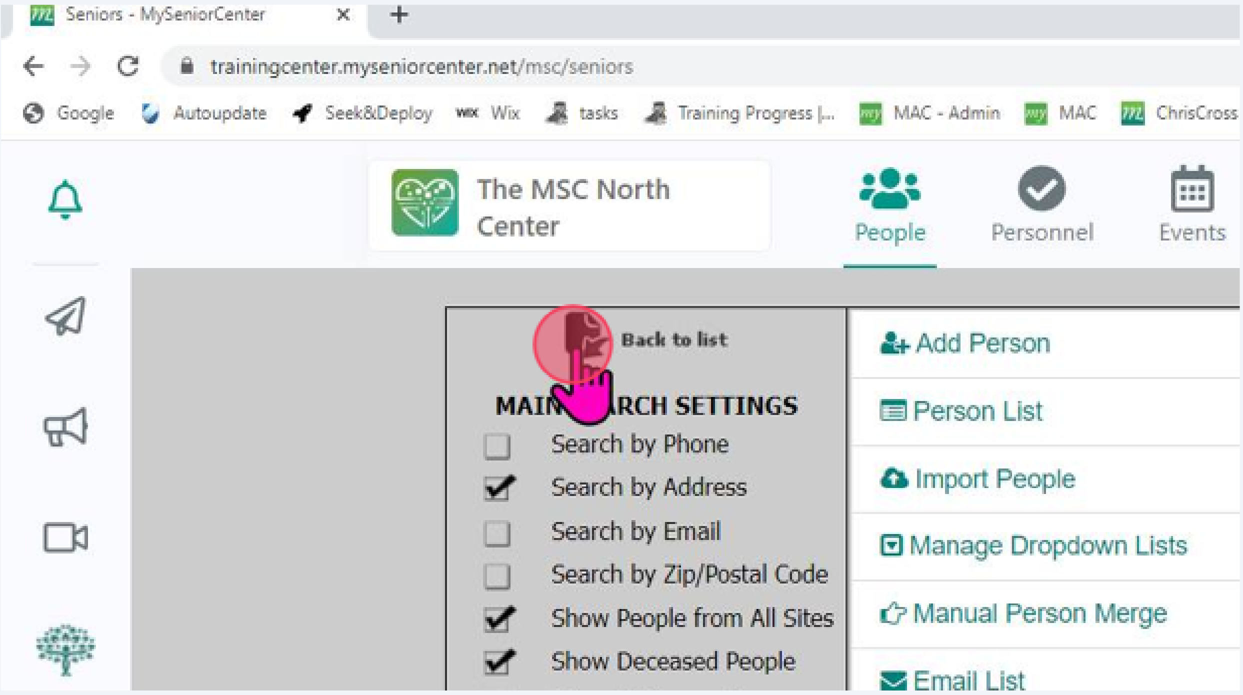
33 Deceased people are hidden from the list.
Click "Advanced" above the search box.



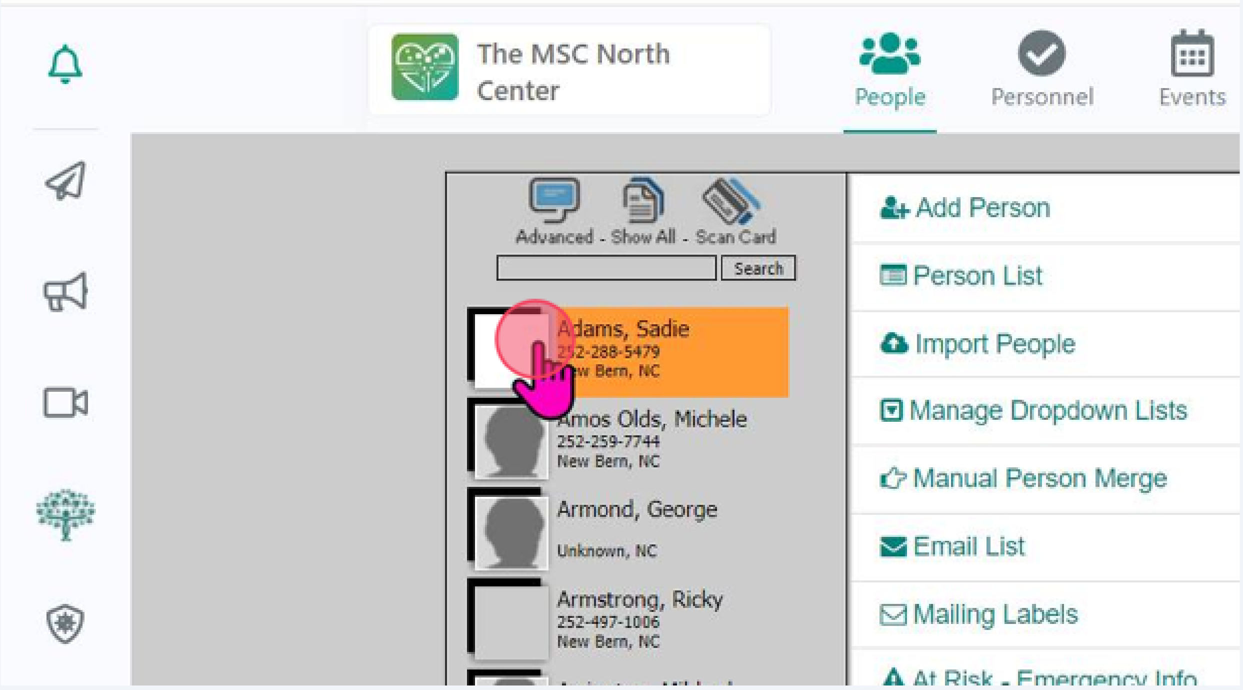
34 Re-check "Show Deceased"



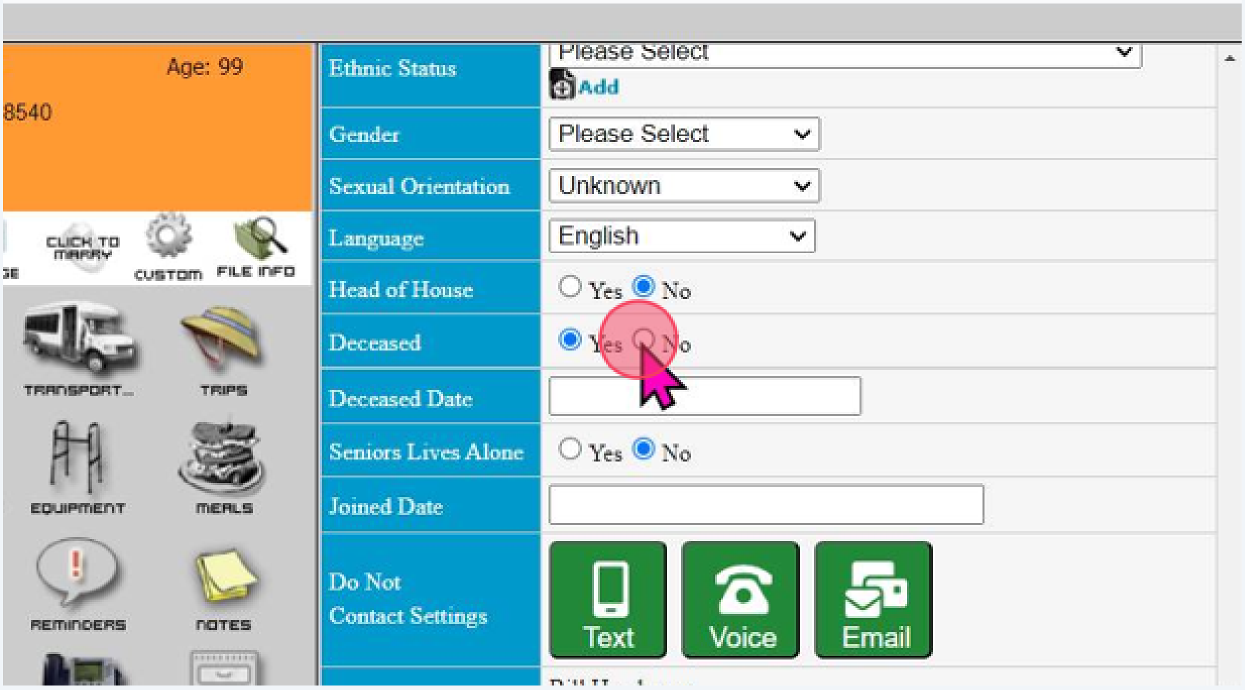
35 Click "Back to List"



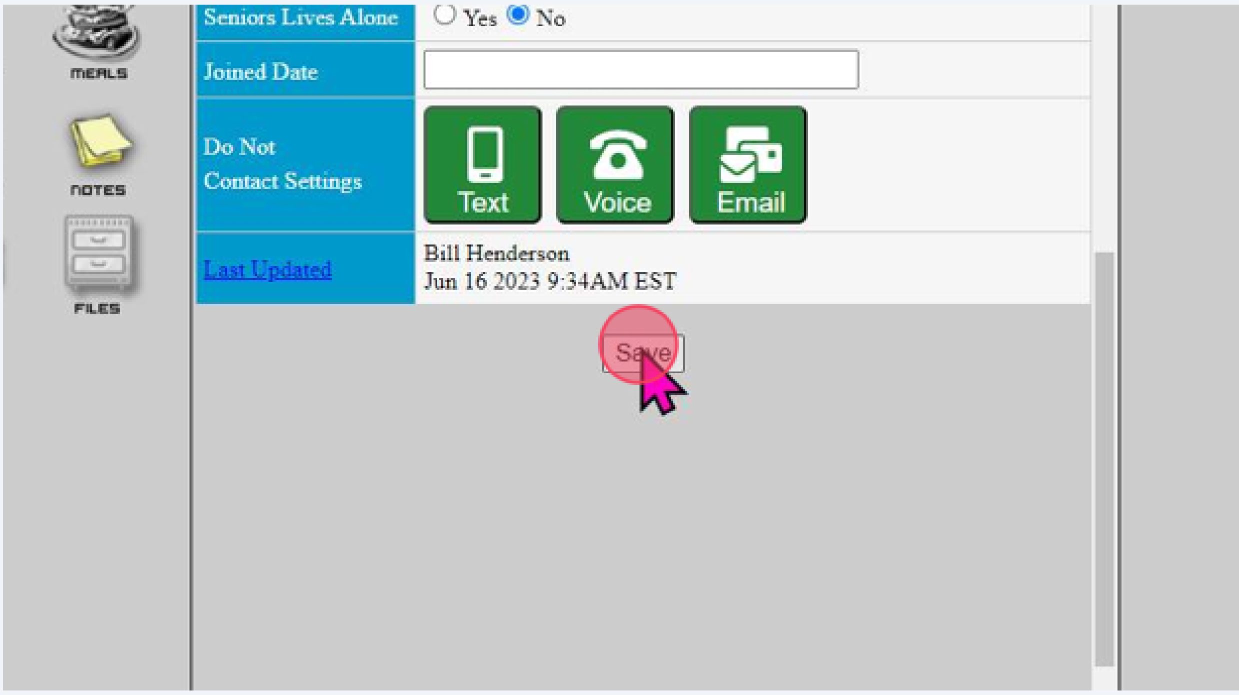
36 Deceased People show back up again.



37 People do get set to deceased by accident from time to time. If this happens simply change deceased back to "No".



38 Click "Save"

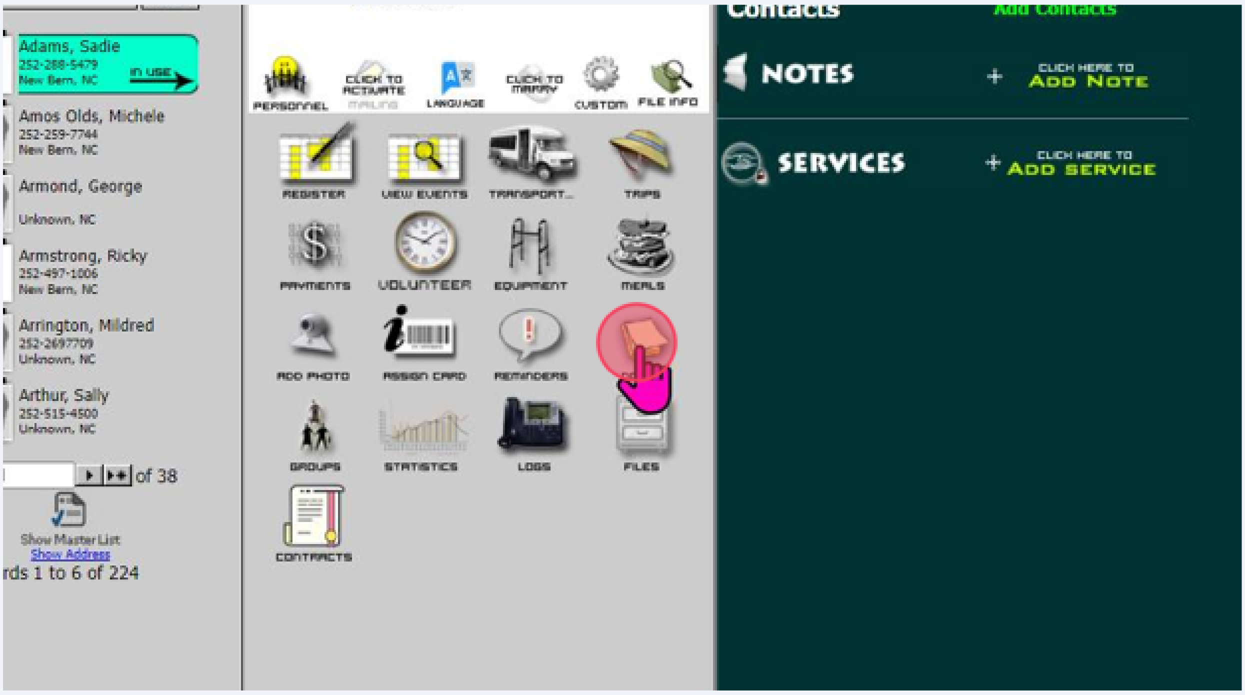


Both Archived and Deceased people are skipped in broadcasts. There are settings to include archived people if necessary but not deceased people. When you set a person to deceased, if they are pre-registered for any future events, they will be removed from those events as well as any groups they belong to.

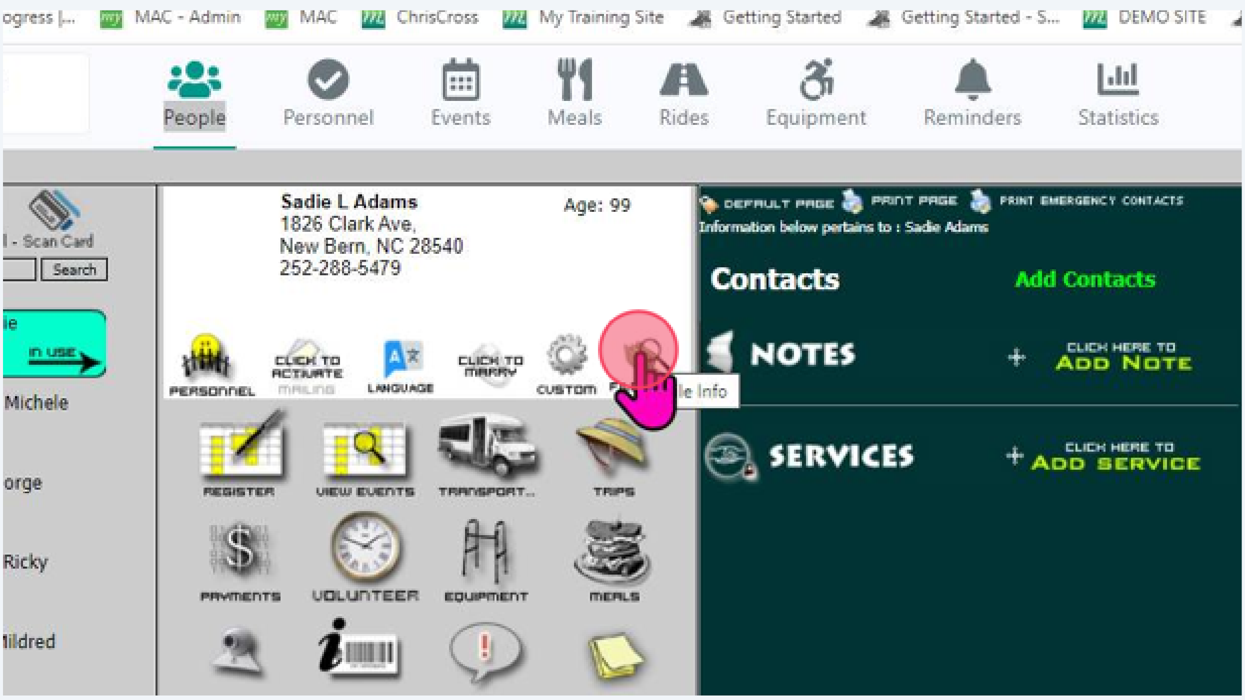
The Sticky Notes Icon - Contacts, Notes and Services

Contacts

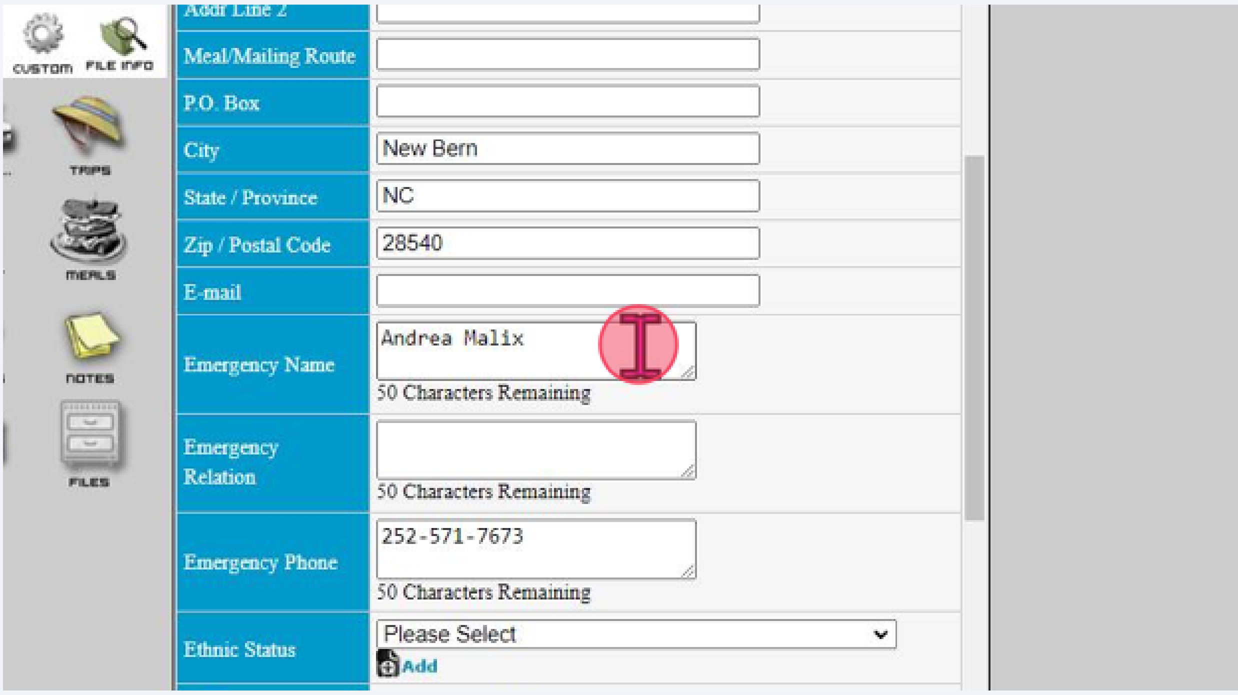
39 The sticky note icon is the default icon that's chosen when you 1st click on a person. The sticky notes icon brings up contacts notes and services.



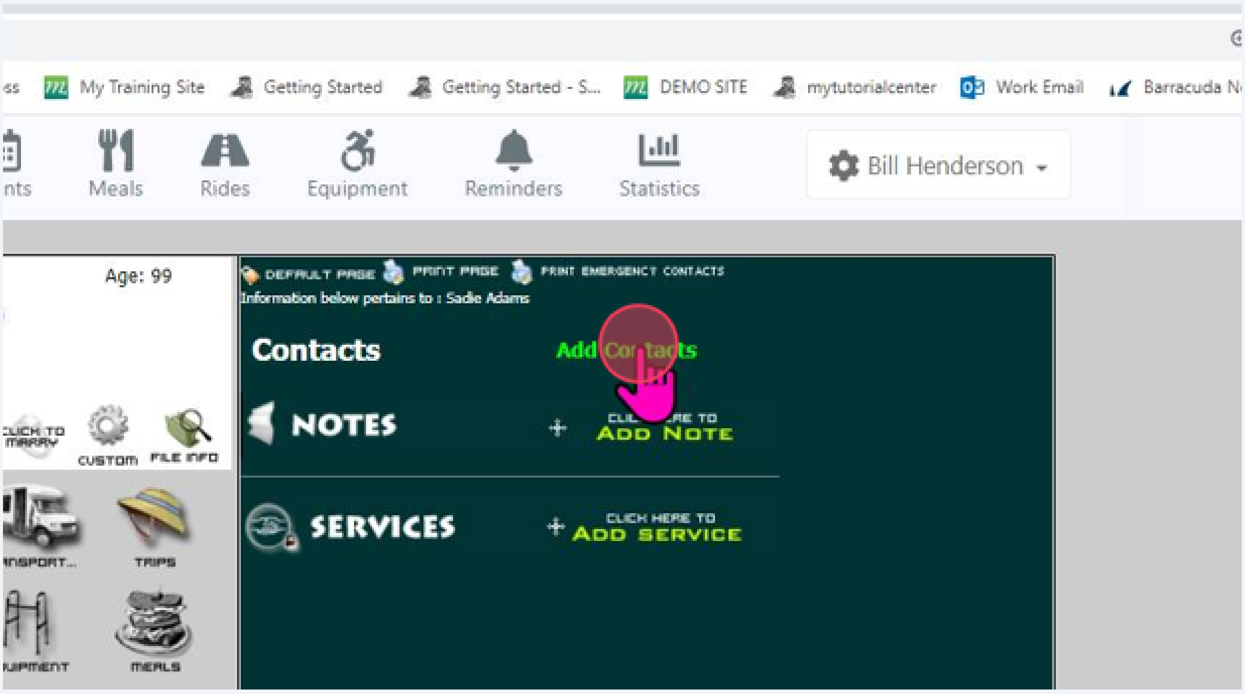
40 Click "File Info"



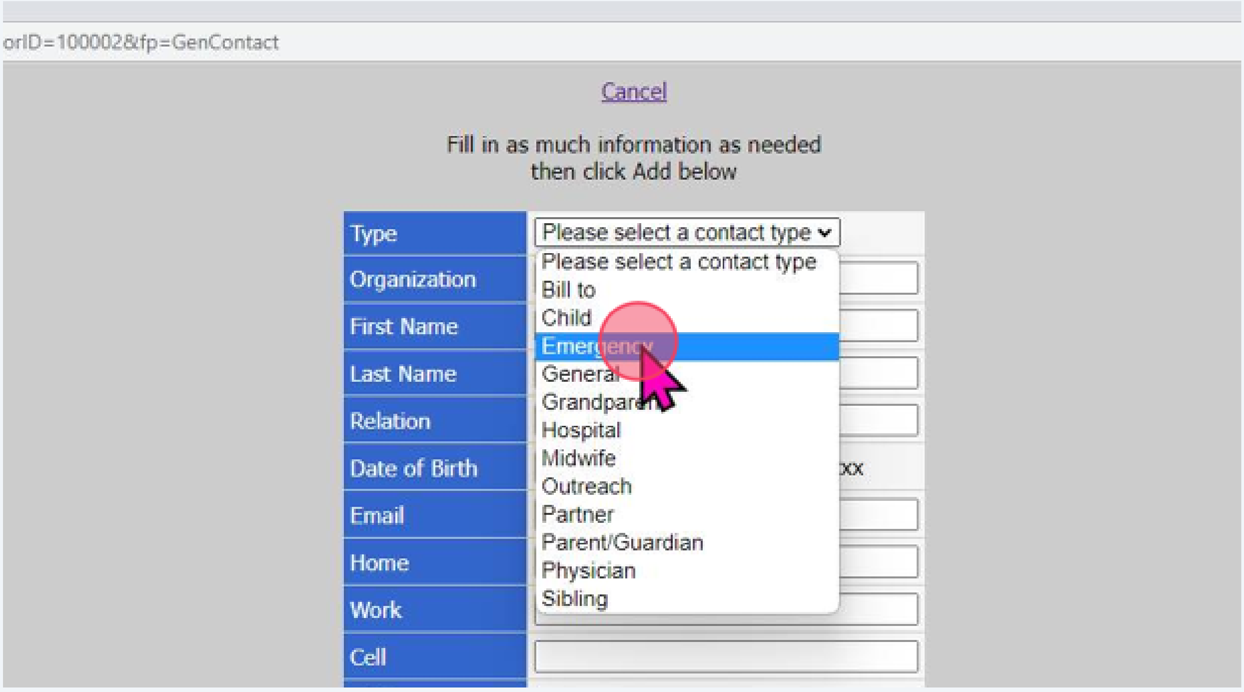
41 When we created a new person we entered their primary contacts at that time. File info is where they live. That's where we would go if we needed to update them with any changes. Click the sticky note icon



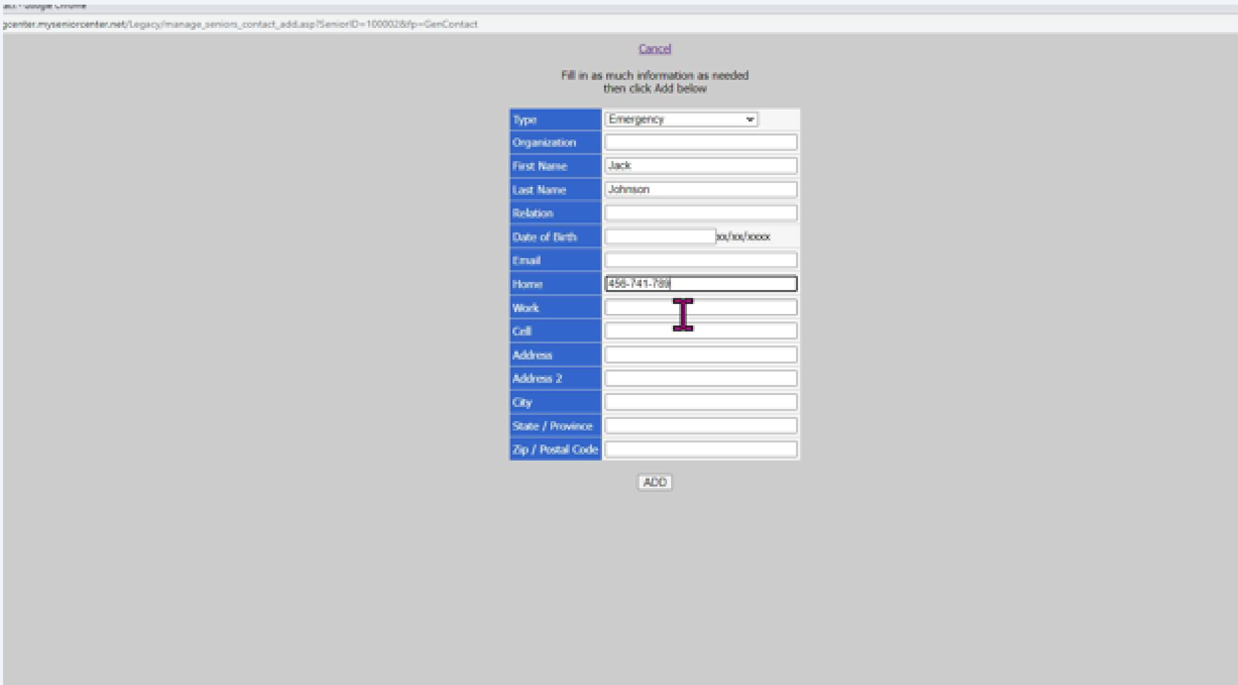
42 The contacts under the sticky note icon are for any additional contacts you might have for this person. They could be more emergency contacts or they could be other types of contacts as well and you can add as many contacts as you like. Click add contact



43 Click the type drop down and choose emergency

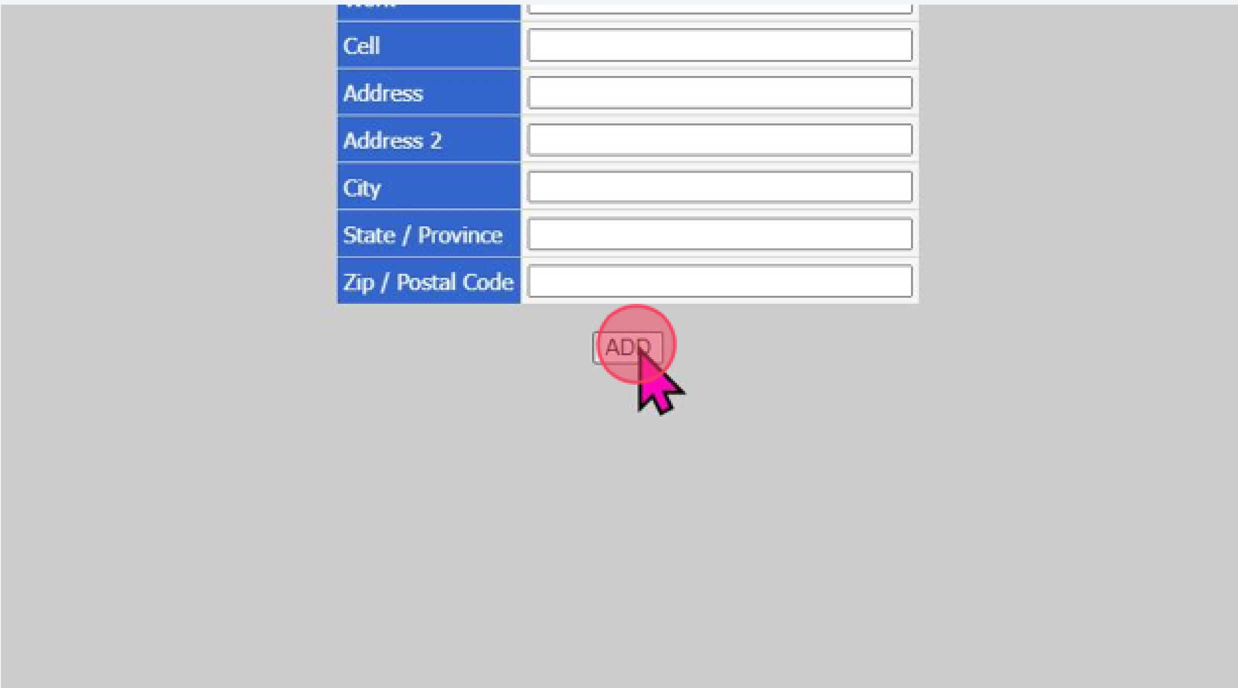


44 Fill in as much or as little information as you like about this contact. Nothing is required.



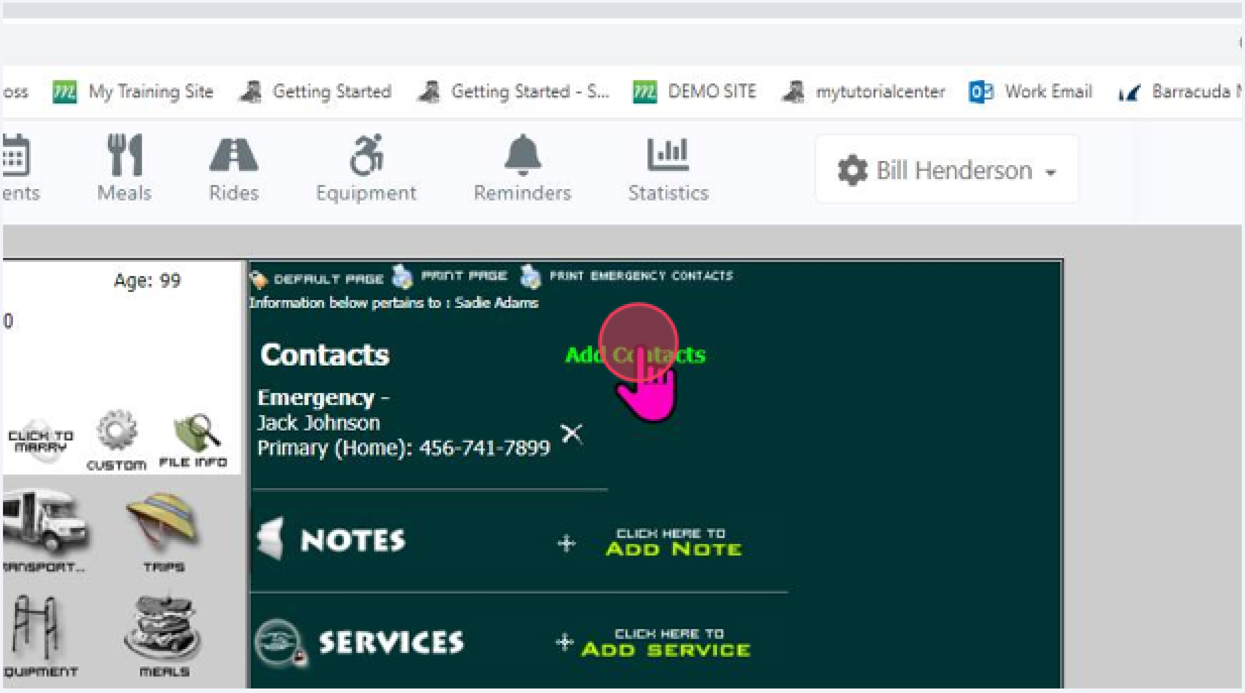
45

Click "ADD"

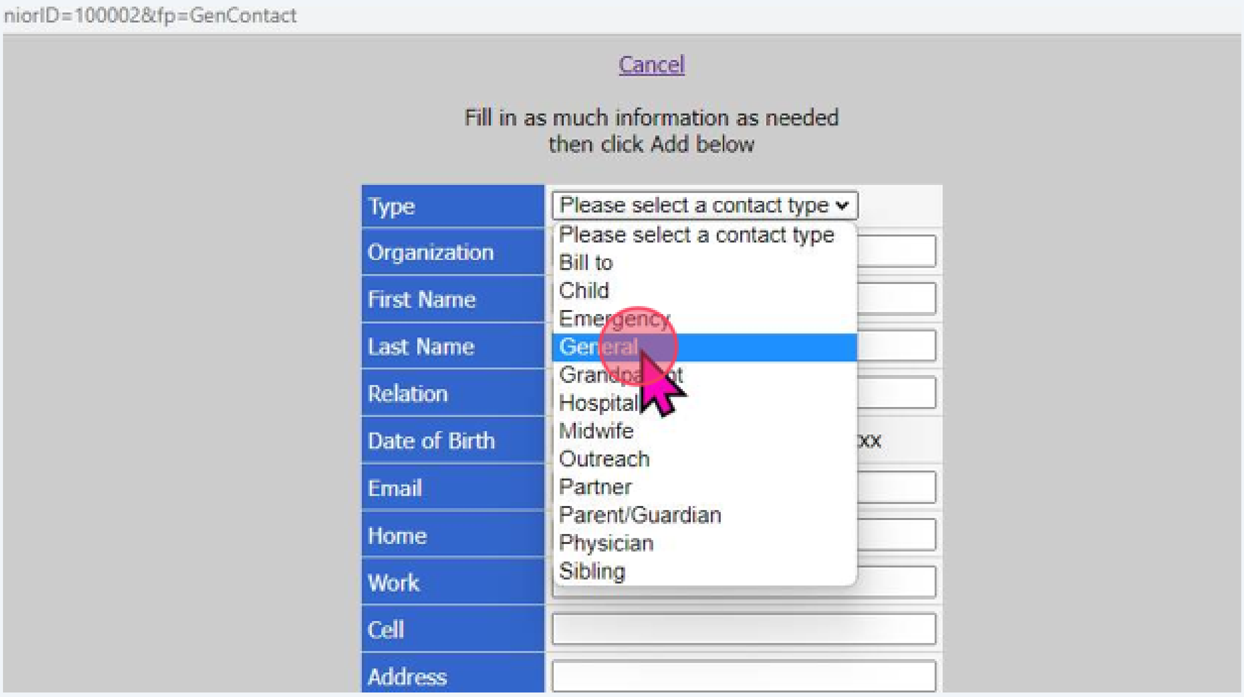


46

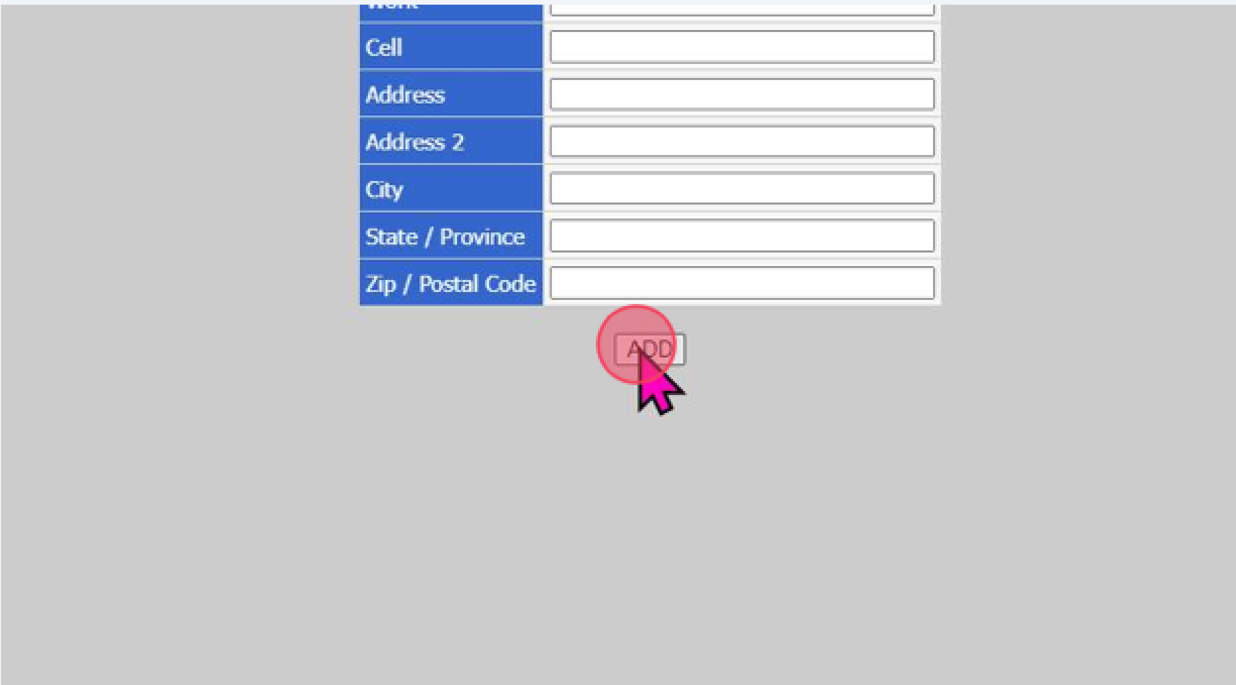
Now we can see that contact listed there. Let's create another contact. Click add contact.



47 This time let's create a general contact. Fill in as much or as little information as you like.



48 Click "ADD"



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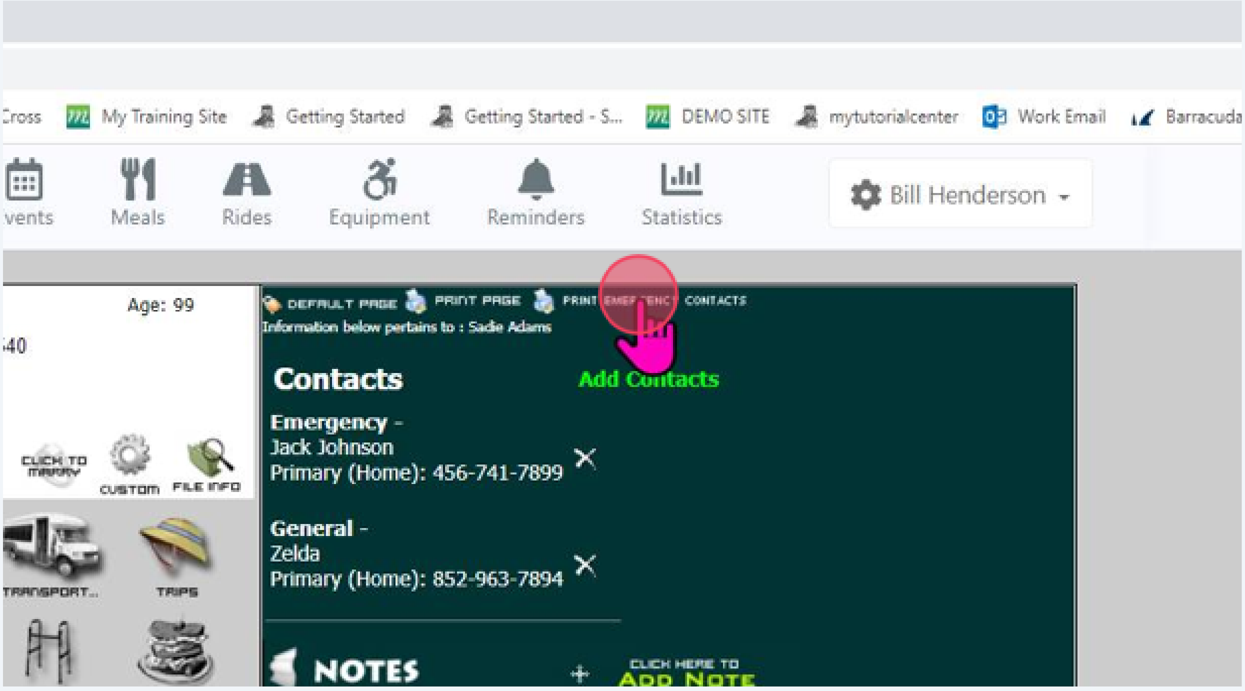
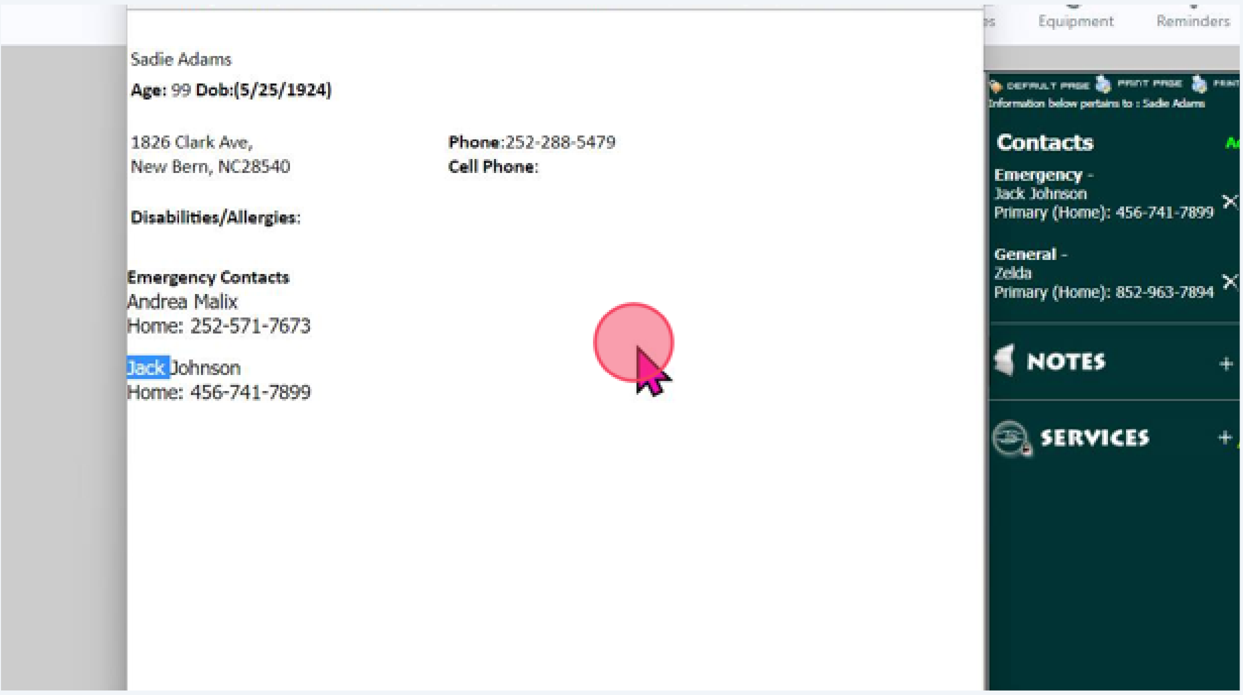
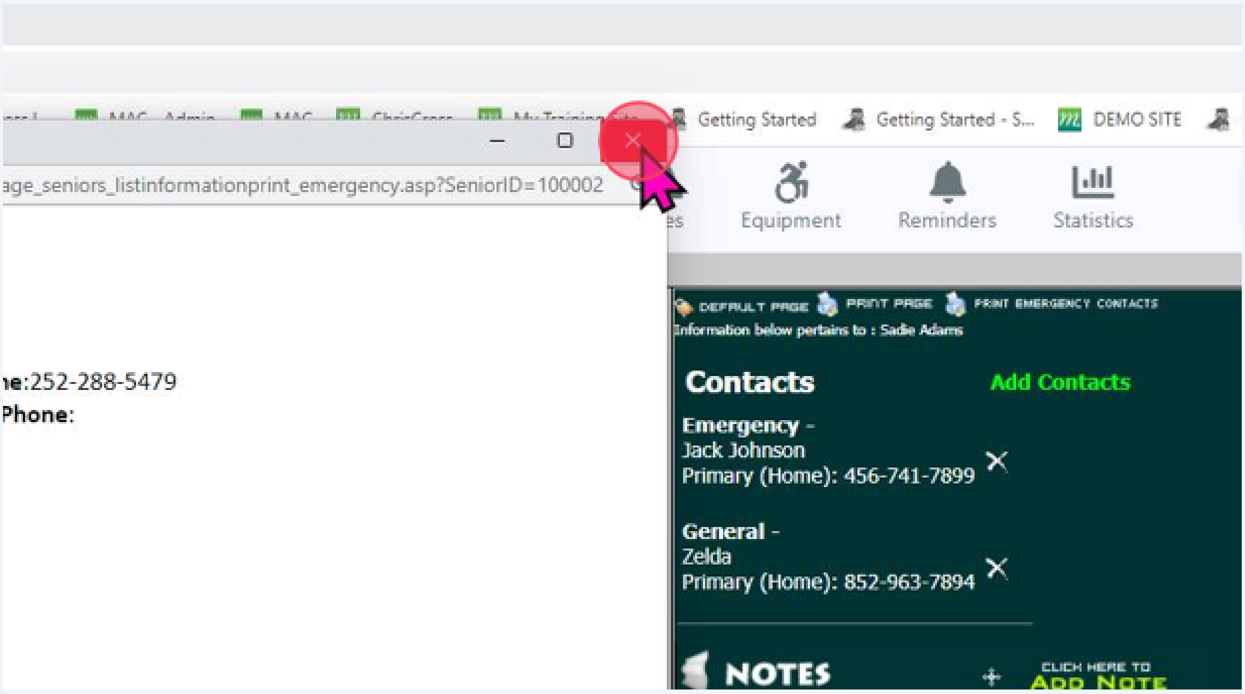
Now we can see the 2nd contact listed there. If you have an emergency situation you do not have to go digging around into the different areas. As soon as you find the individual whose contacts you need, click print emergency contacts to the right above the contacts.



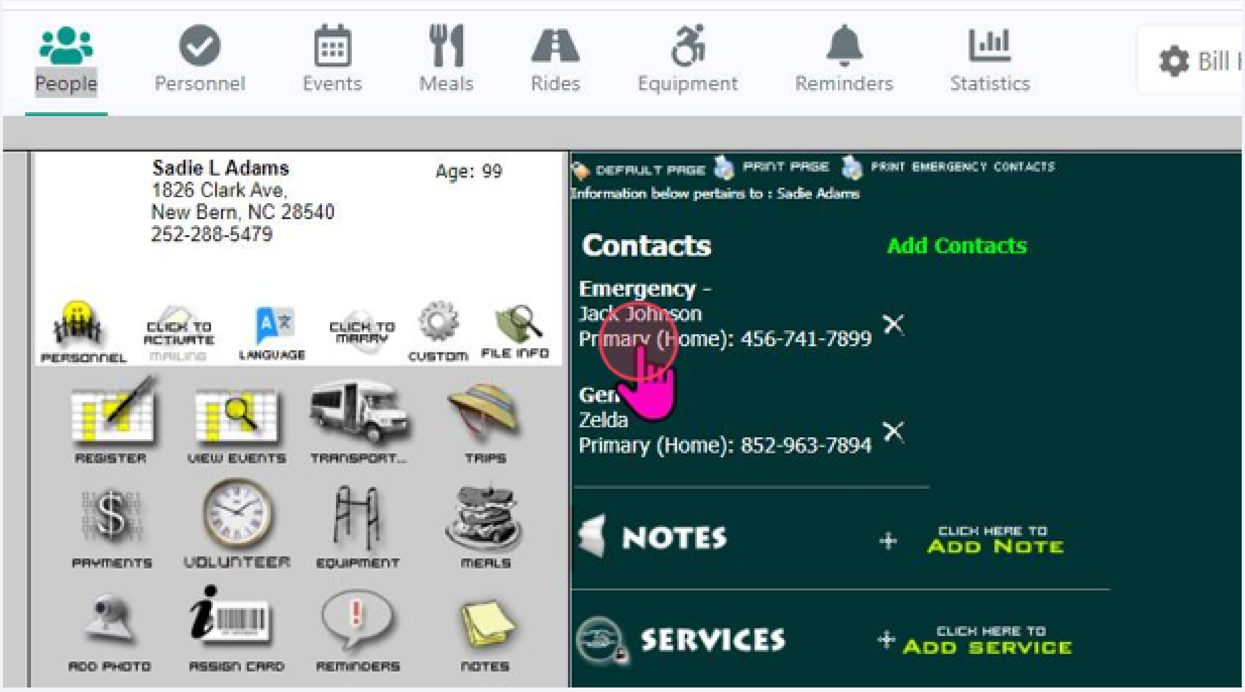
50 This will grab their primary contact from file info along with any other emergency types we create. Here. You can see Zelda is not listed because Zelda is a general contact not an emergency contact.



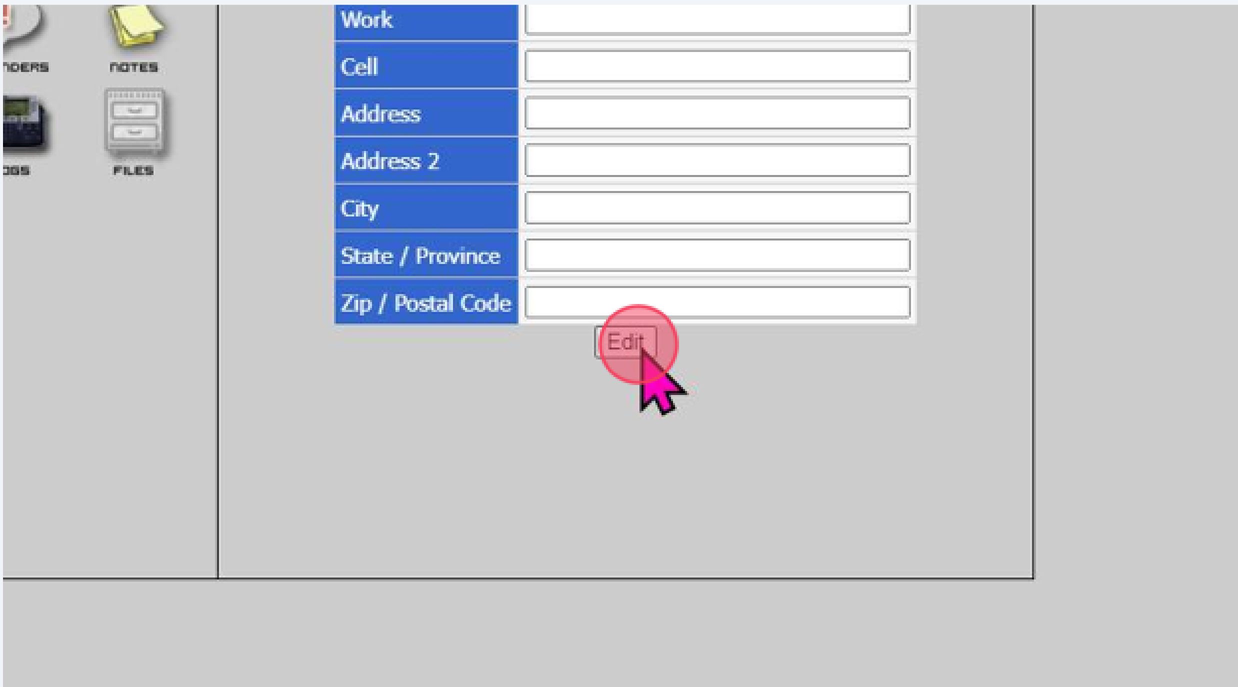
51 Click "Close"



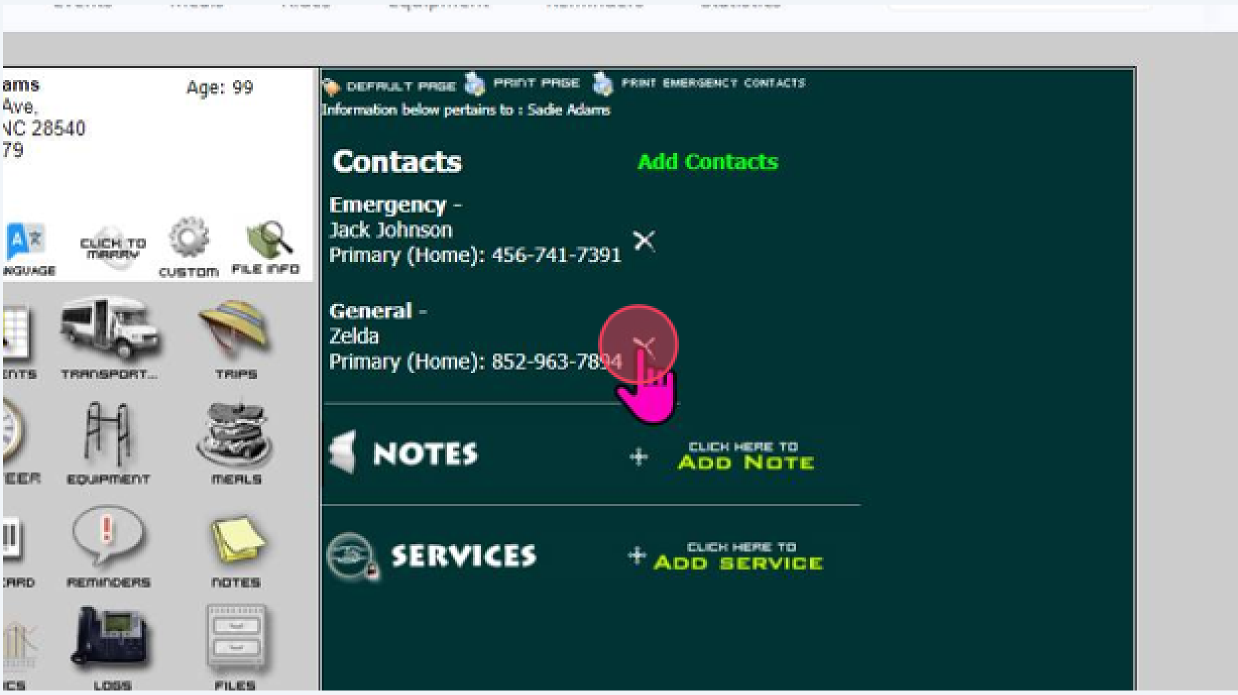
52 If you need to update one of these contacts, click on it.



53 Make any changes needed then click "Edit"



54 If you need to remove a contact, click the white X



Notes

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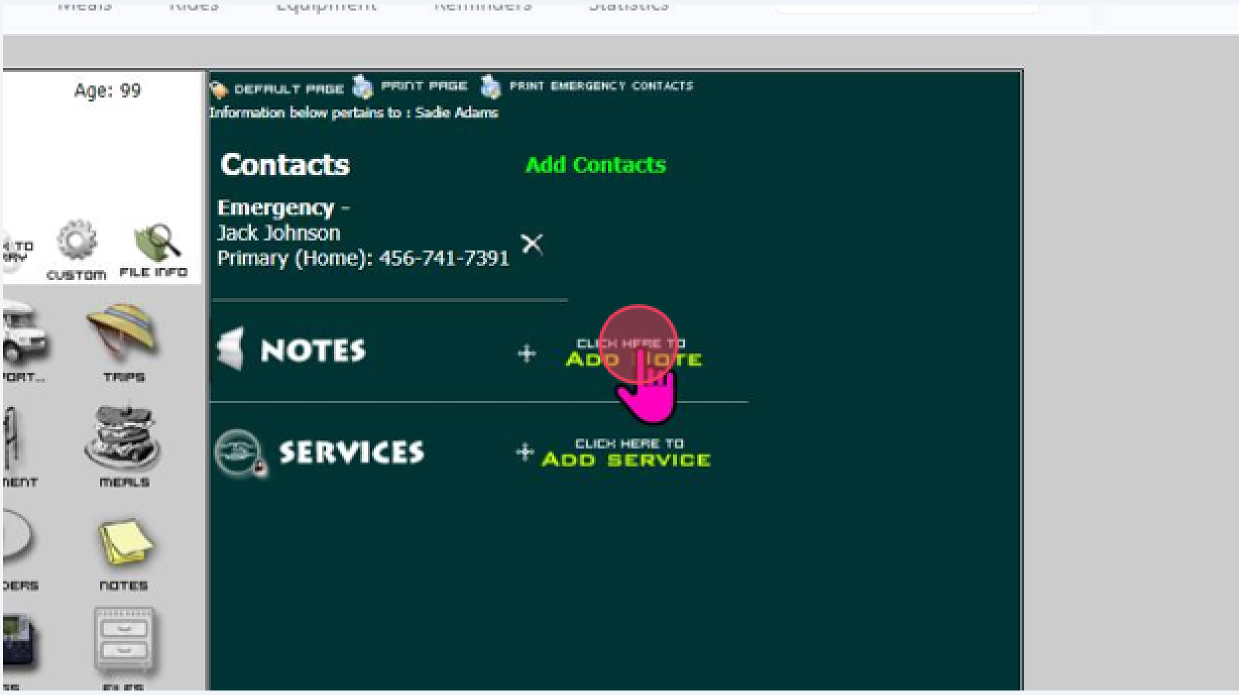
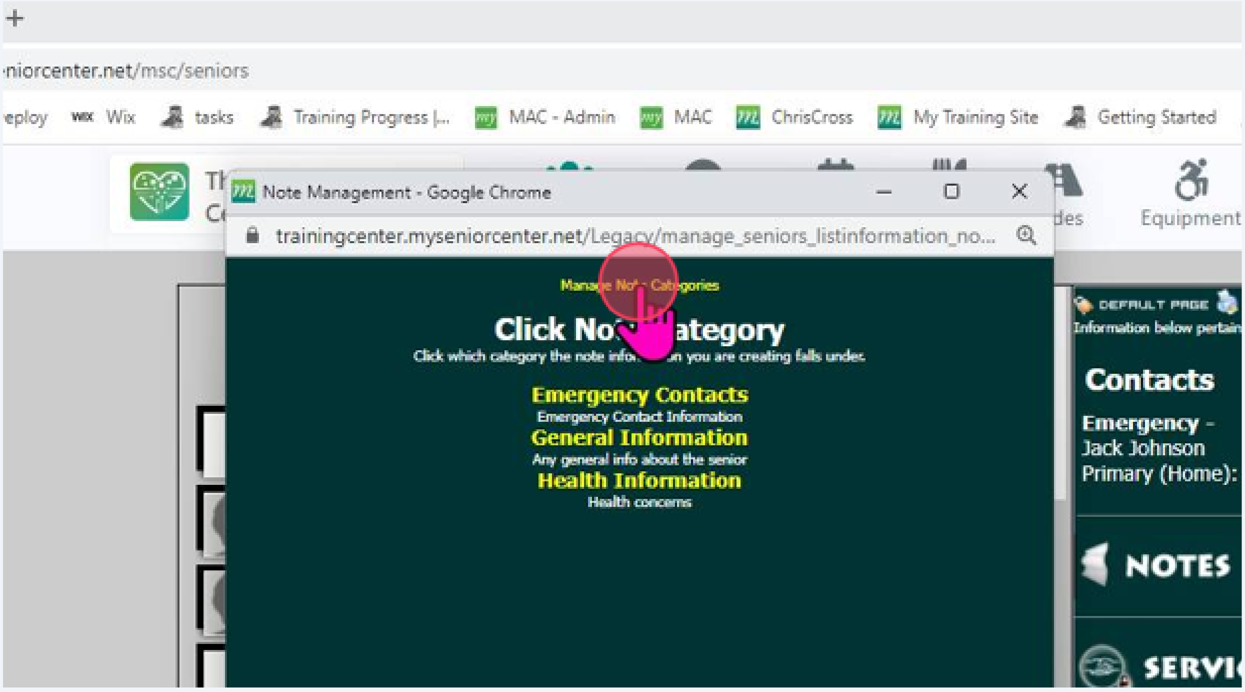
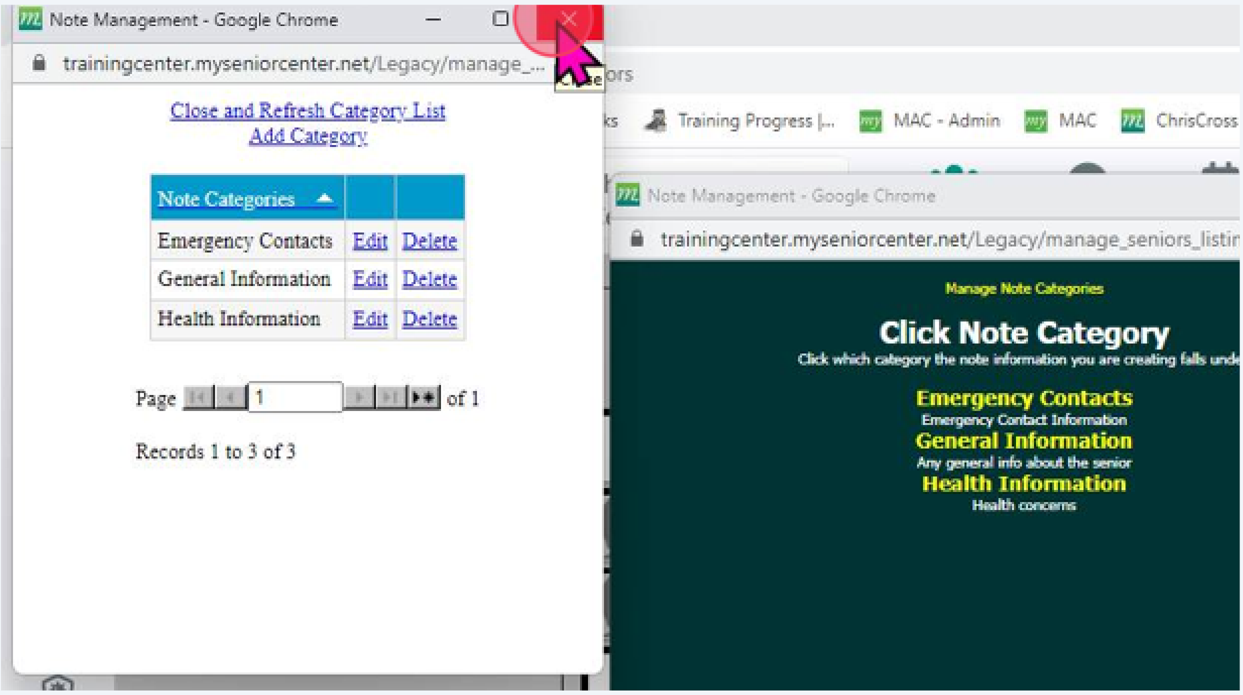
Notes are meant to be very general notes about the person. These notes are not meant for anything confidential or anything service related. We'll learn about those kinds of notes next. These notes are available to all staff members. There is no way to lock anybody out of these notes. When one of you puts in a note the rest of you will see the note as well and you'll also be able to see who put that note in along with the date. Notes do not provide any sort of reporting at all. That's just not what they're intended for. They're meant to be seen in MSC when you're looking at that person's file.
Click "Add Note".



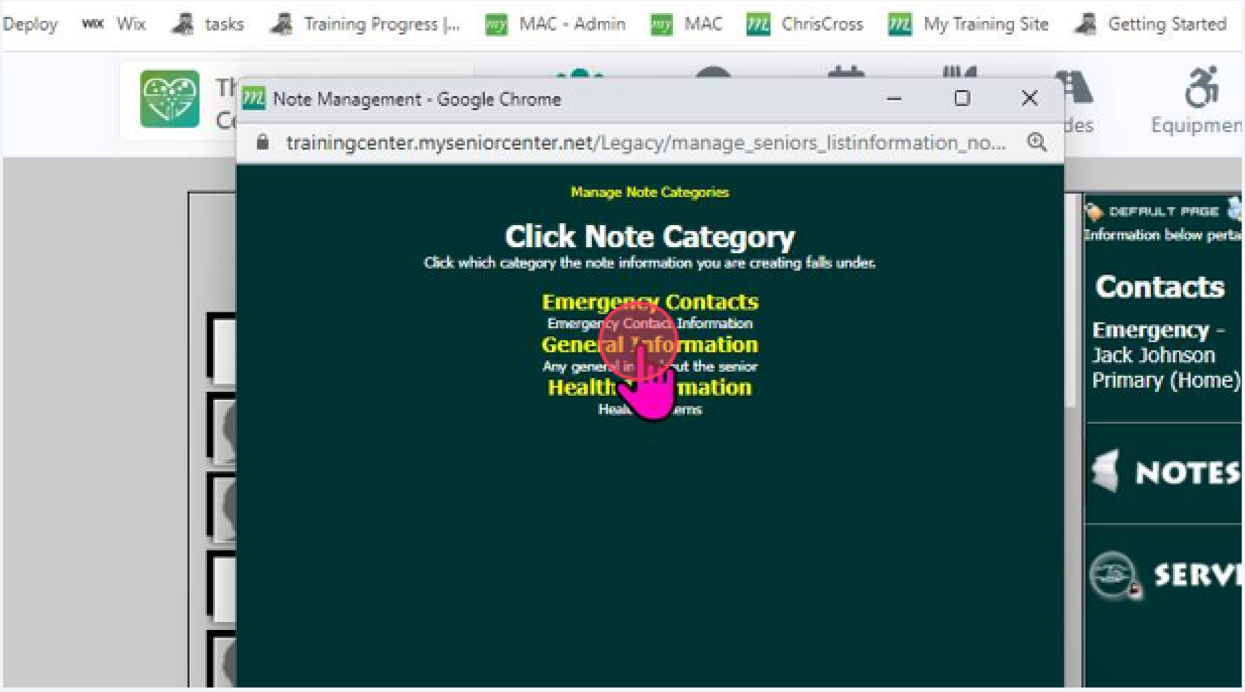
56 In the pop-up window you will choose a category. If you need to add/edit or delete choices from the category list, click "Manage Note Categories".



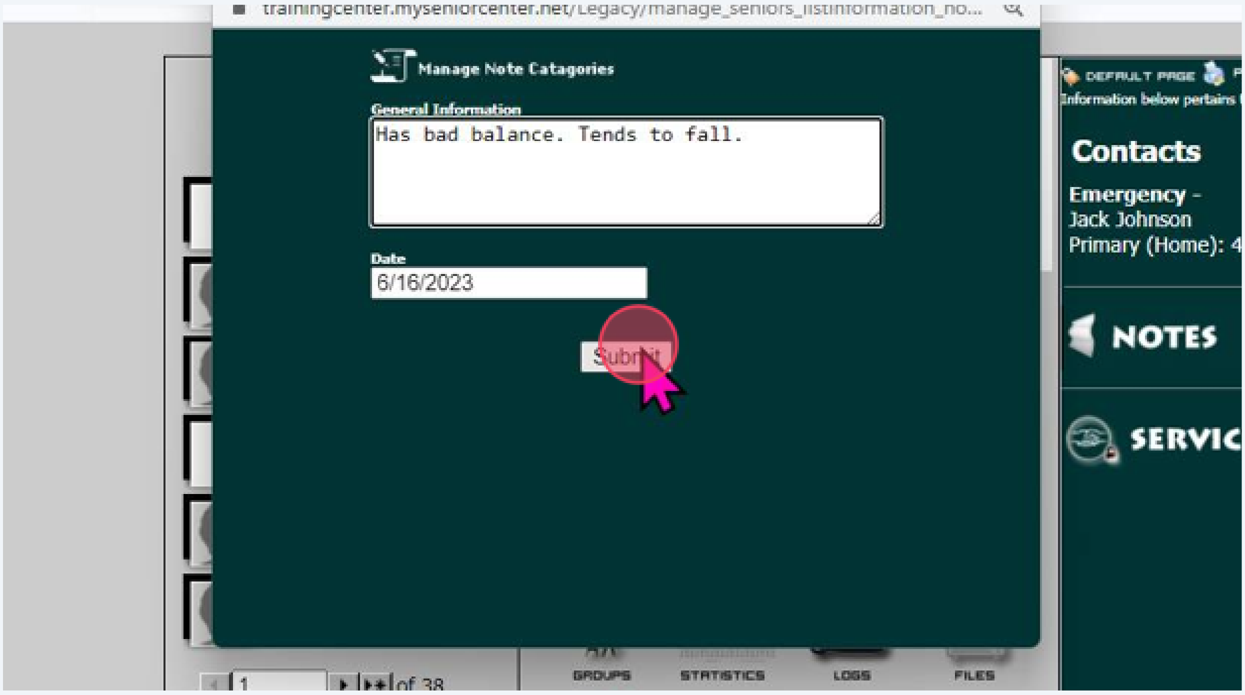
57 In the separate pop-up window you customize the list of categories. Close the window.



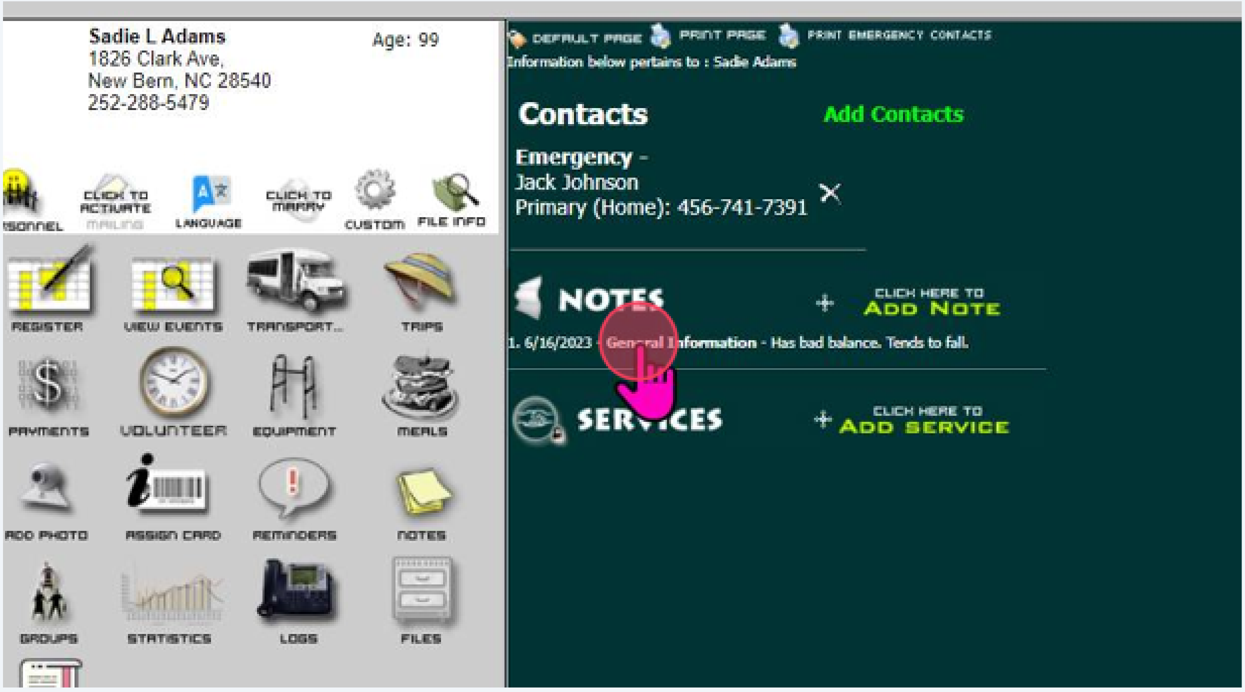
58 When putting in a note simply click a Category.



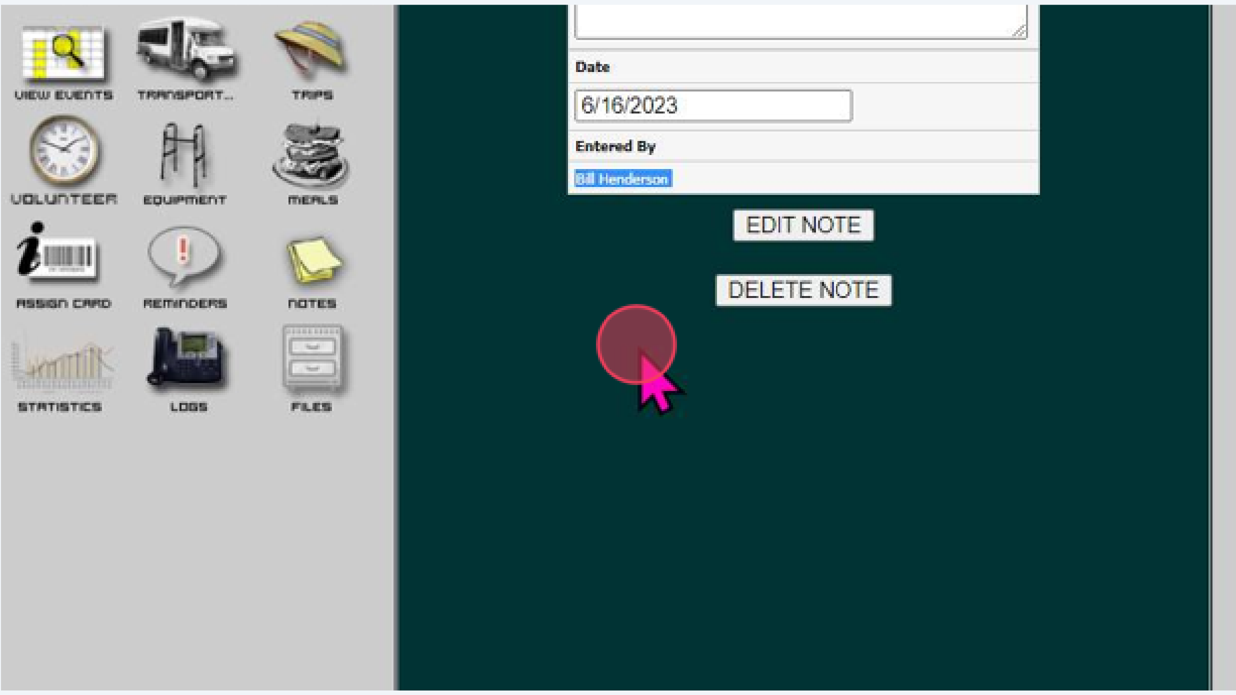
59 Type your note and click "Submit".



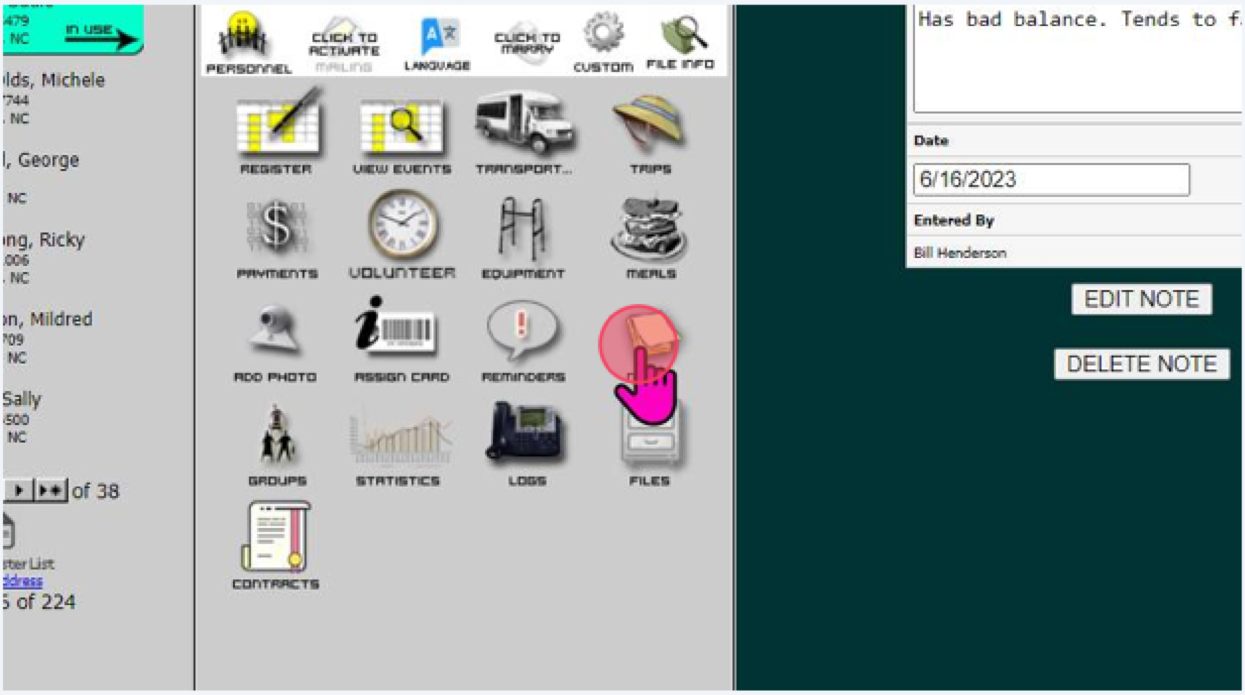
60 Now you can see that note listed there along with the date.
Click on the note.



61 Here you can see who entered the note.



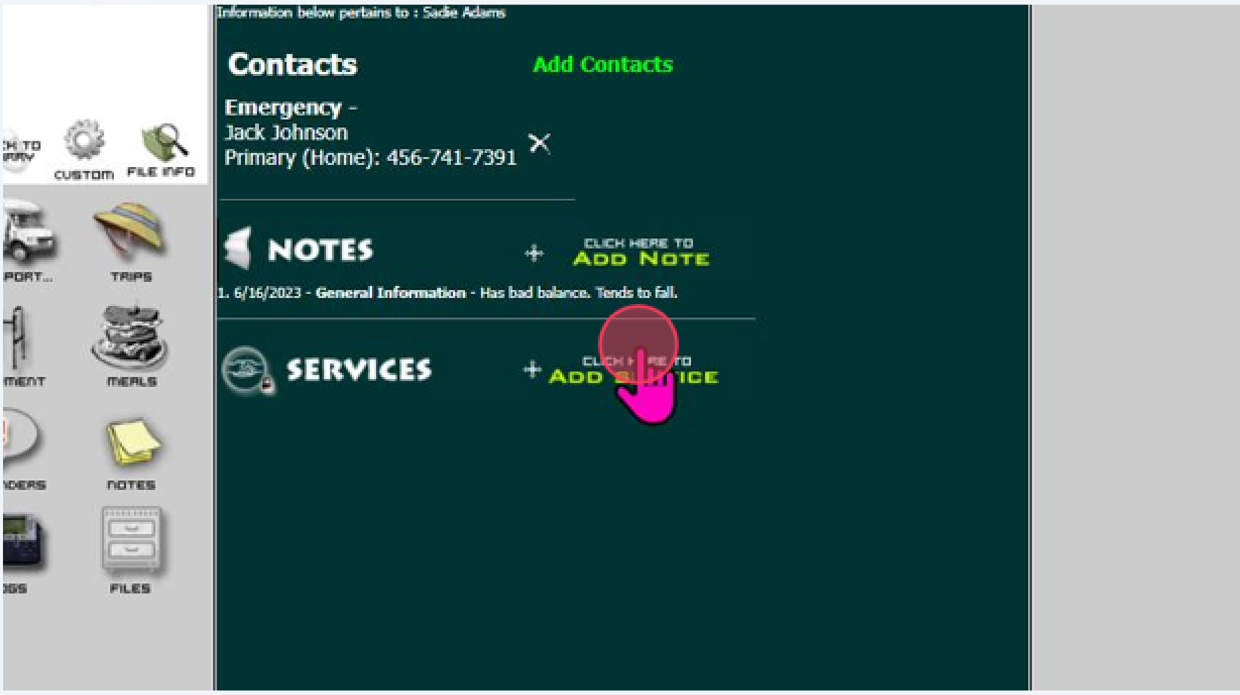
62 Click on the "Sticky Note Icon".



Services/Outreach

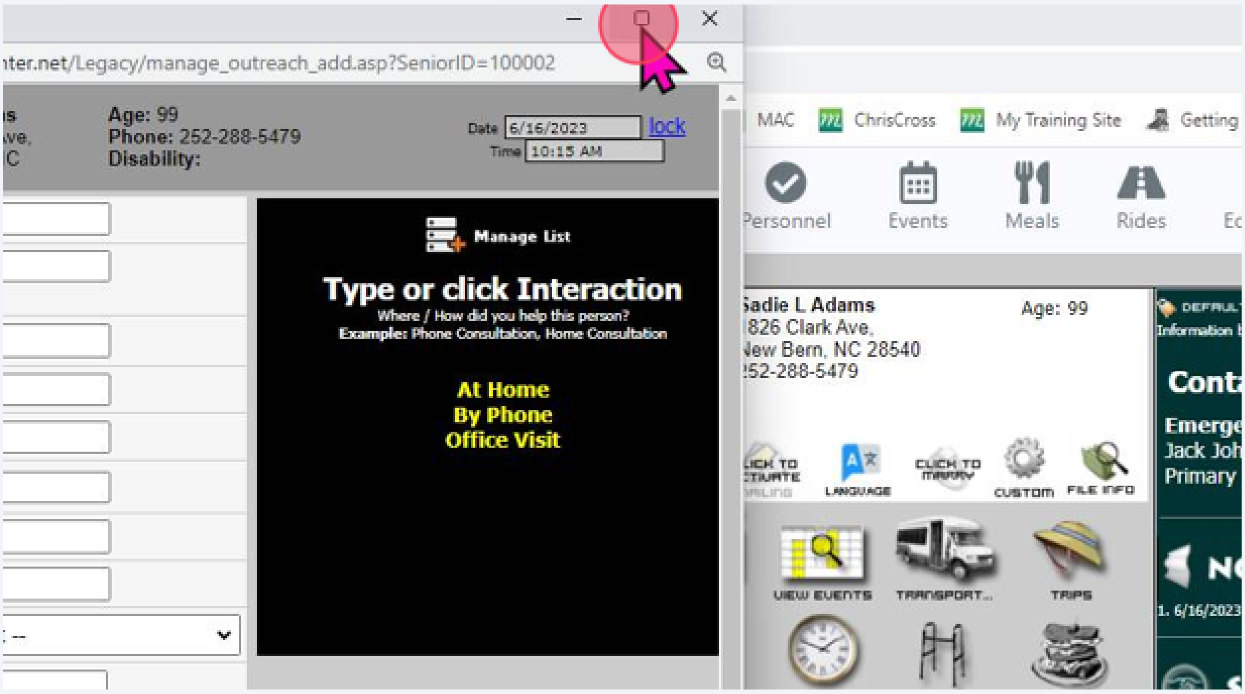
63 Services is designed for more confidential case notes that service providers are entering that not everybody at your organization should be able to see. Outreach Workers use it, Social Service Providers use it, Nurses use it, it depends on each center and who they have working there. But the main point is that you are able to decide who has access and who does not. Whenever any staff member gets their user name/login set up, an admin has to choose their permissions. During that process they are deciding whether or not you have access to the services section. If you have access you see the services section there and you can see past records as well as add new records and run reports. If you do not have access then you simply do not see the services section at all and it just doesn't exist for you.

Click "Add Service"

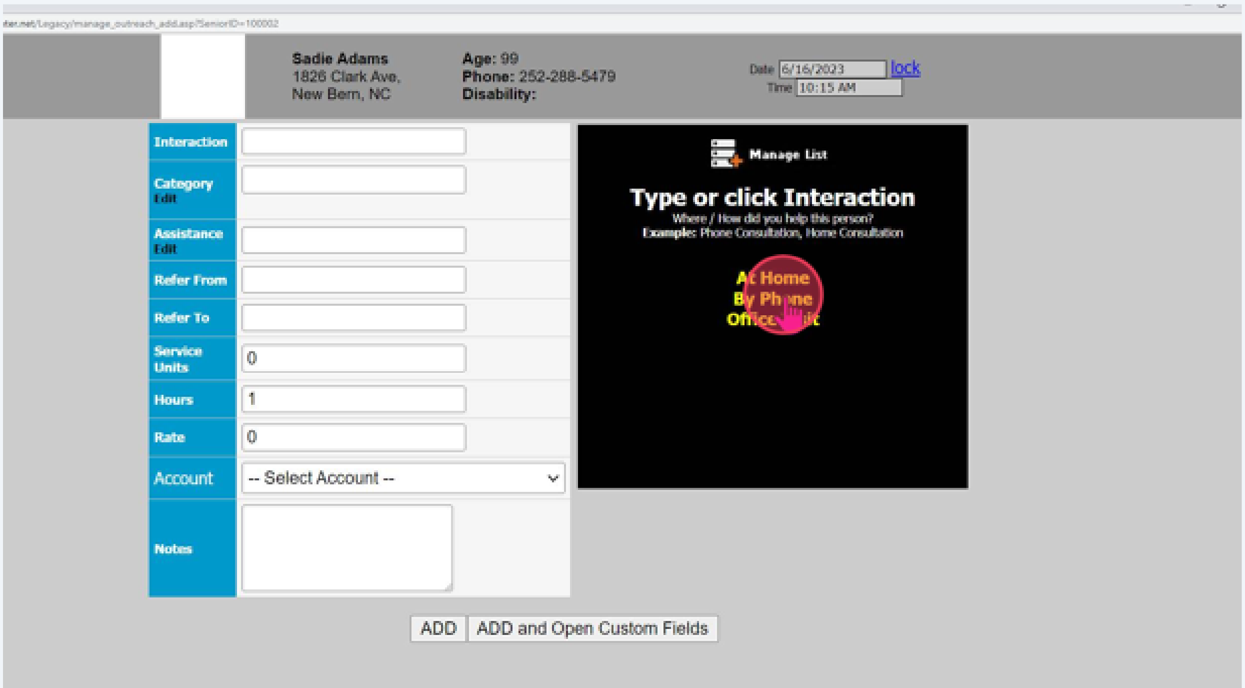


64 Here we're creating a record of a one-on-one interaction that we had with this person on a specific date and time. The date and time will default to the current date and time but you can change those. You can put in past dates, future dates, and anytime that you want. Mostly what you'll be doing is choosing from lists. Just like with our note categories, all of these lists can be edited. There's always a link at the top to manage the list just like with our note categories.

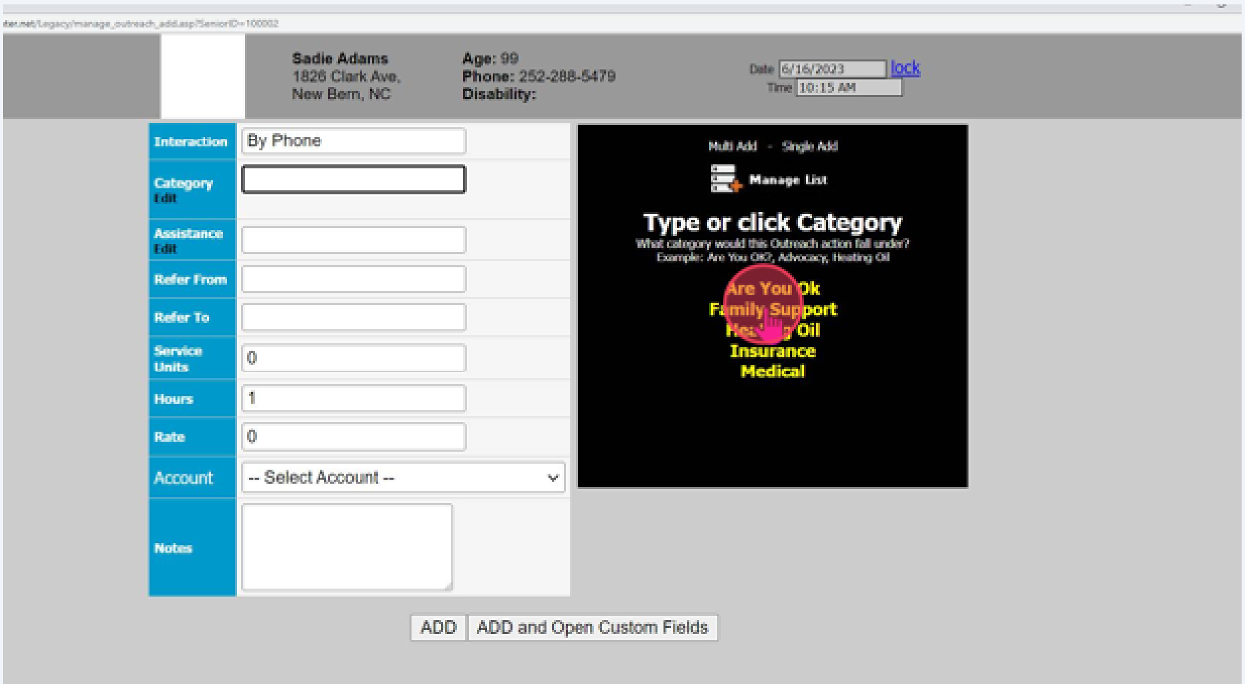
Expand the Window



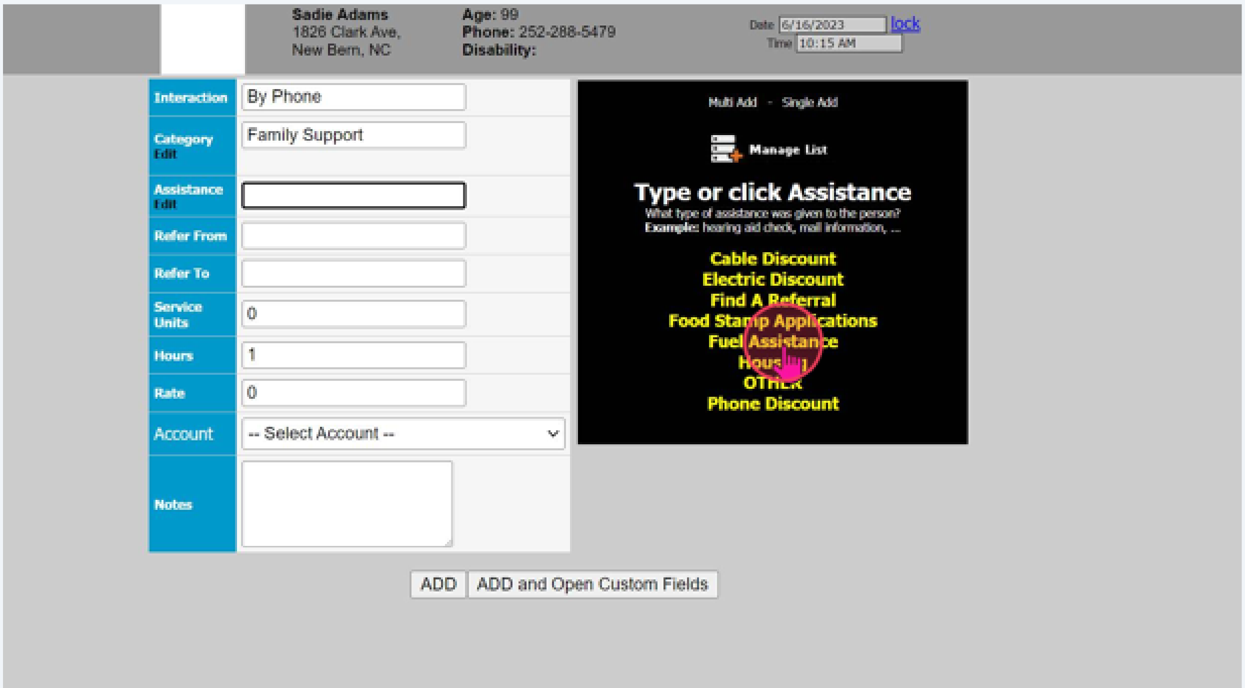
65 First we're going to choose an interaction type.



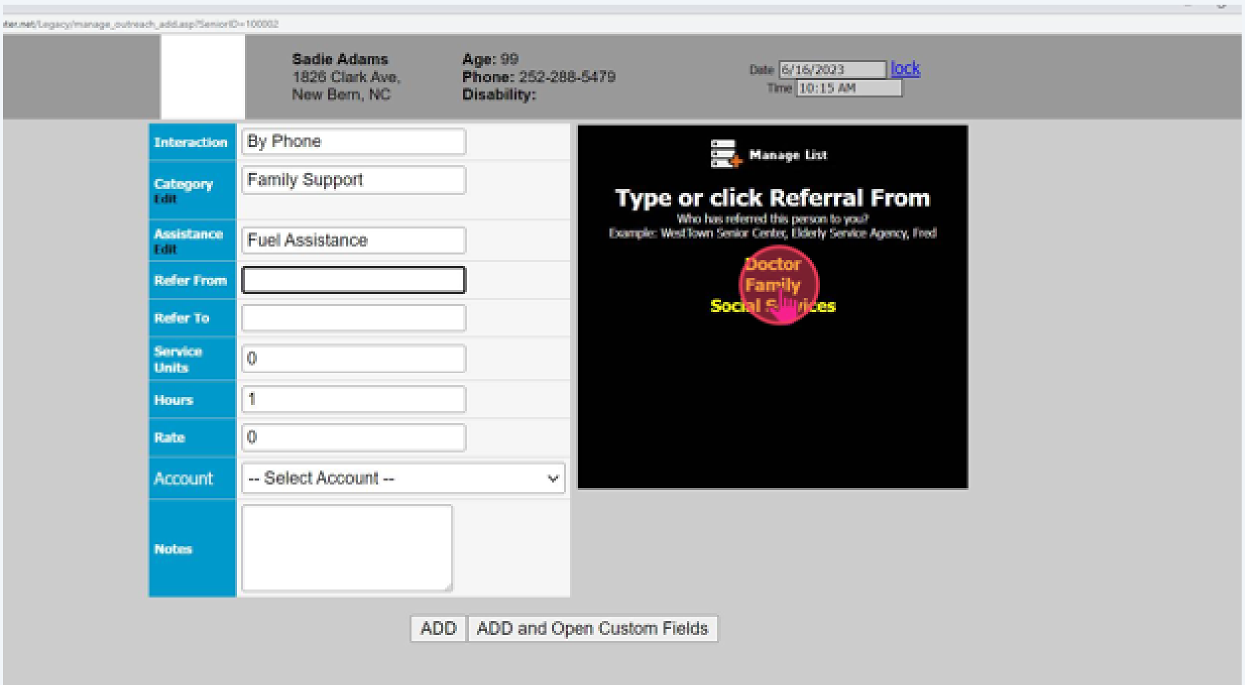
66 Next you'll categorize the interaction.



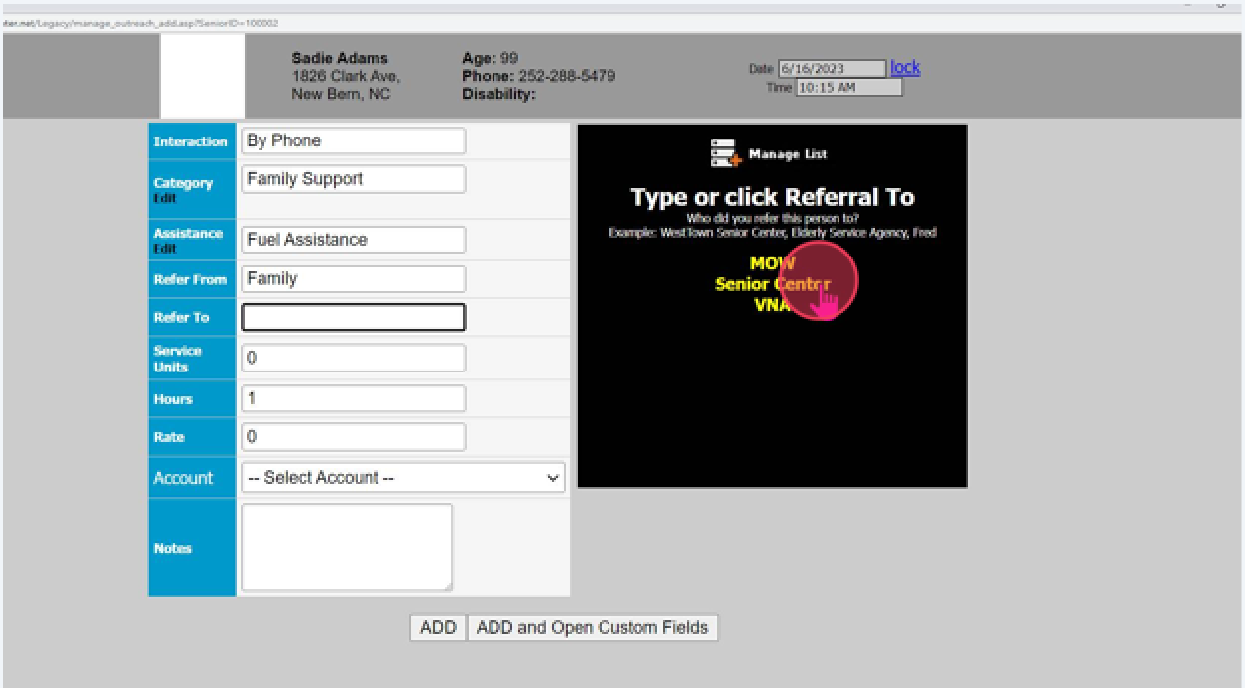
67 Next you can indicate a specific service



68 Next you can indicate if they were referred to you



69 You can also indicate if you are referring them to someone else



70

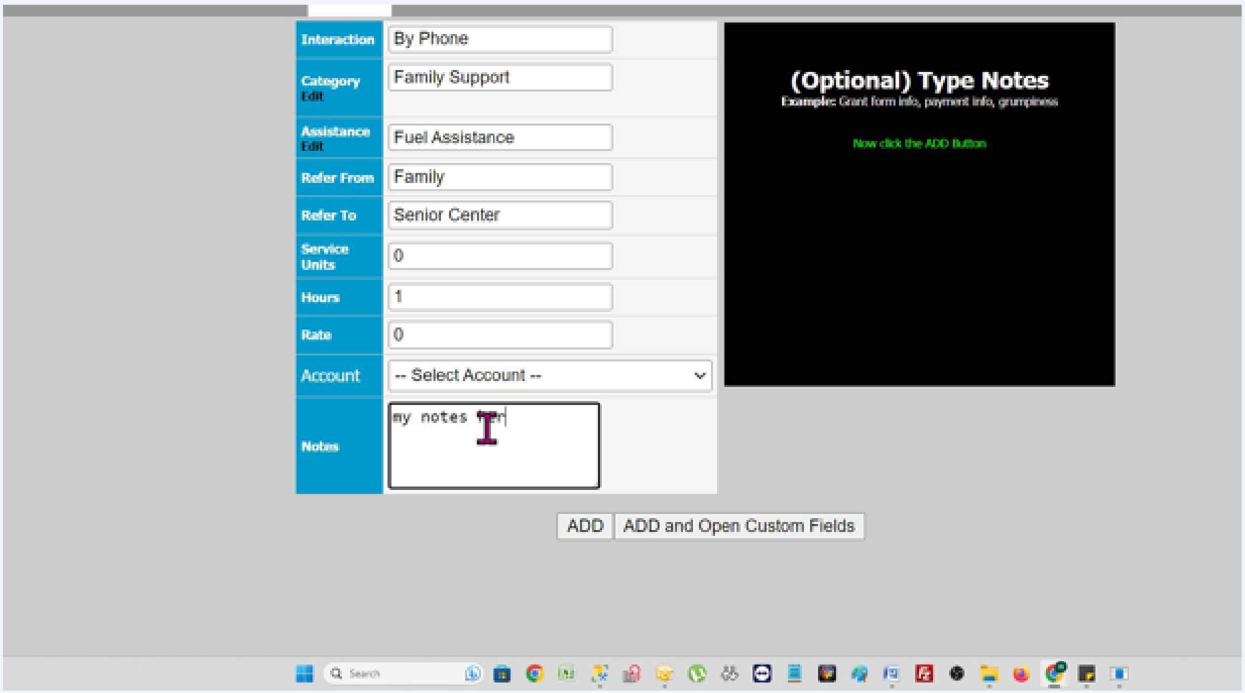
UNITS:
Some centers have a grading system in which they have to assign a certain amount of unit to an interaction based on a number of factors. Although this is one interaction, you can enter as many units as you want. Then, in statistics, you can not only see how many interactions for a date range but you can also get a total number of units.

HOURS:
Here you can also track how much time you have spent with a person and pull totals within statistics. Hours are entered as decimals. For example, fifteen minutes would be enter as .25.

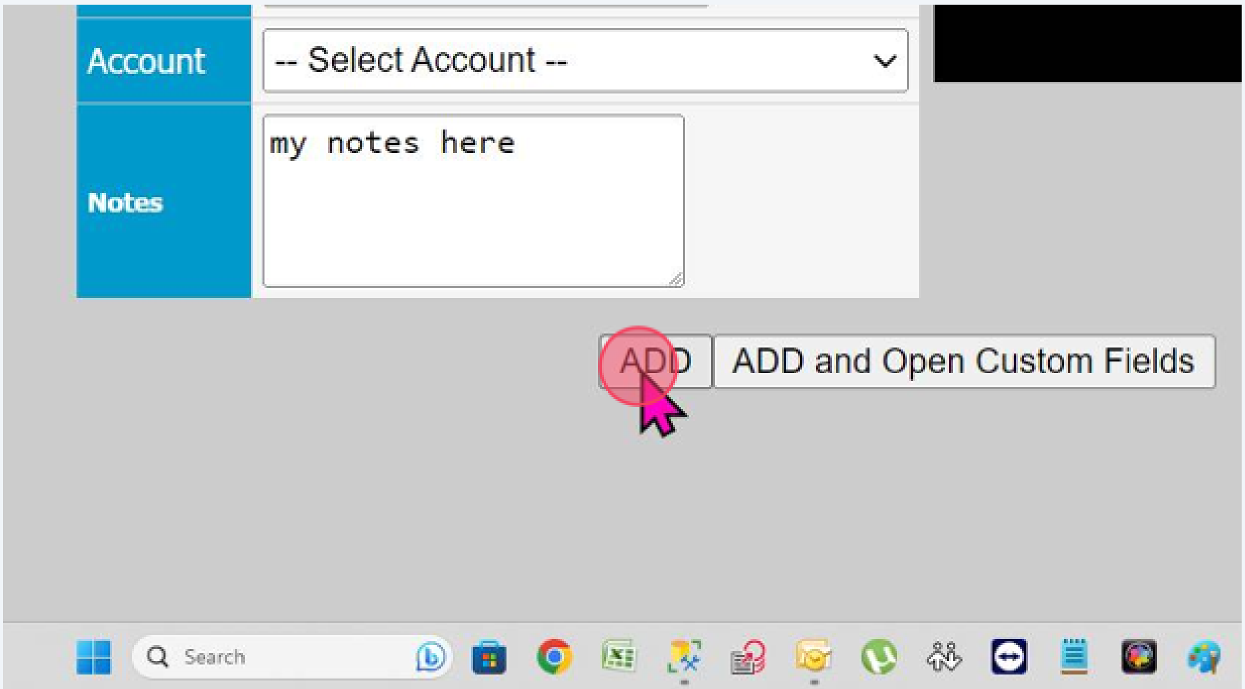
RATE (Optional Field that is turned on under preferences):
Some centers do have an hourly rate they need to apply and from that they can generate invoices.

ACCOUNT (Optional Field that is turned on under preferences):
You can choose which payments received account the rate is be allocated to.

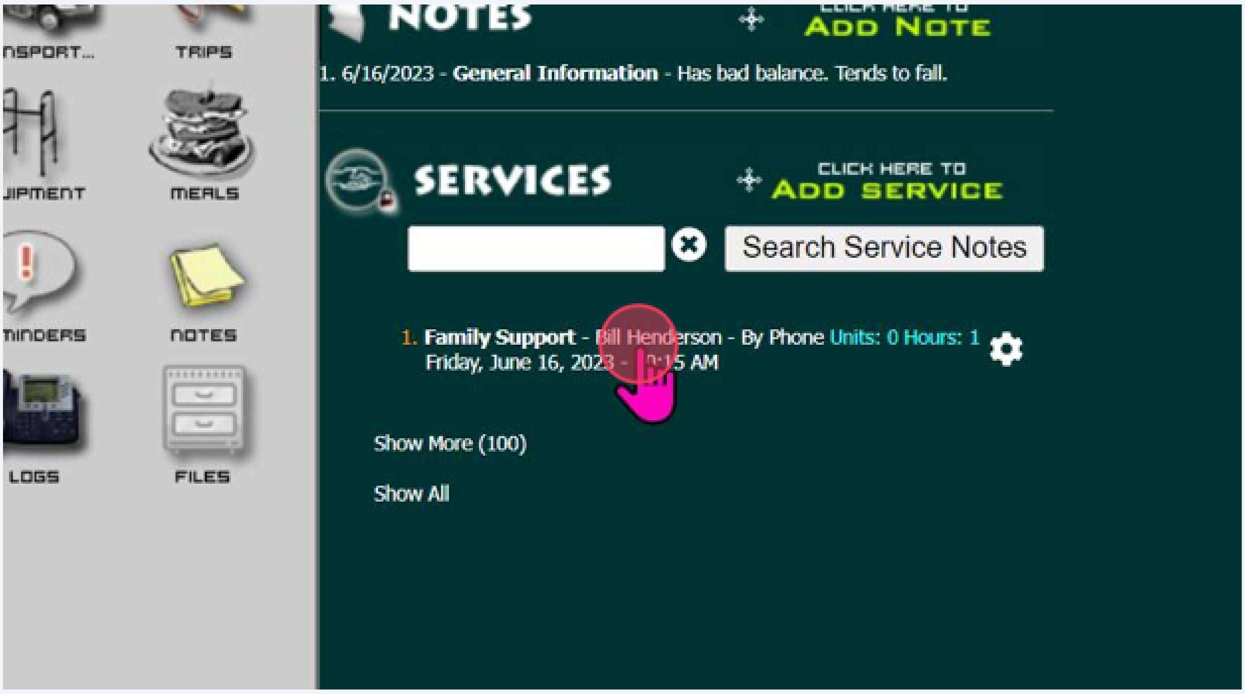
NOTES:
You can enter any notes you like.



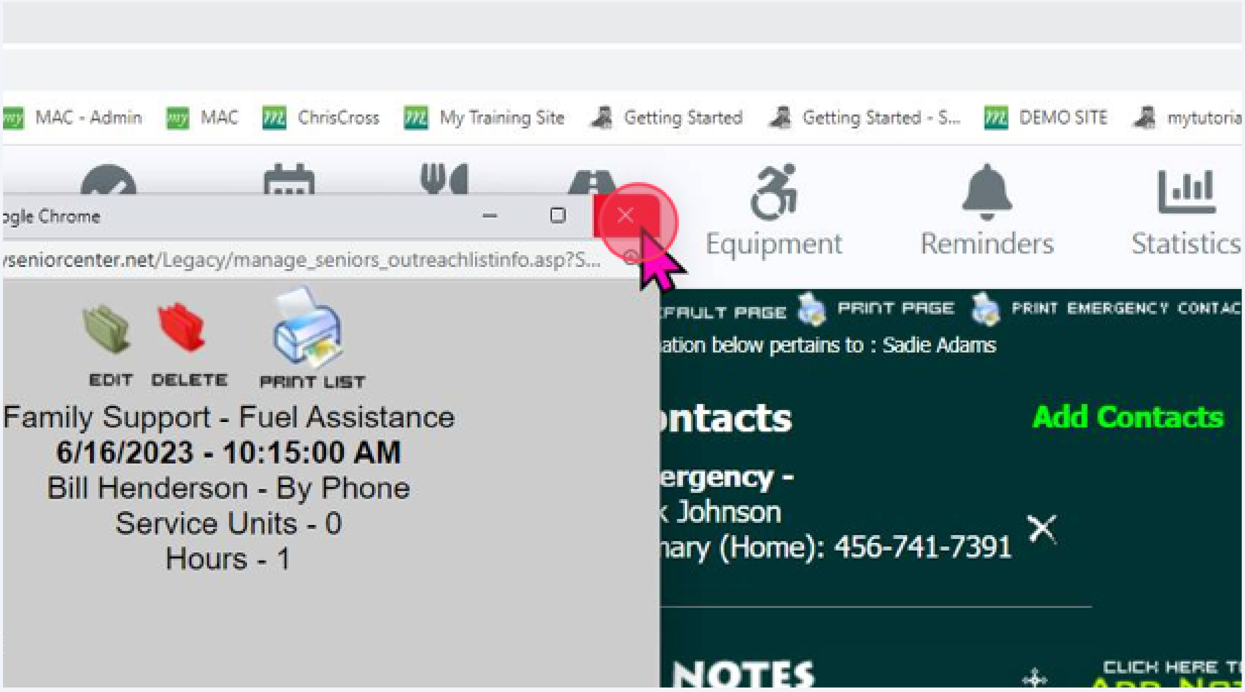
71 Click "Add" to save the record.



72 Now we can see that record listed there along with your name (the creator) and the date and time. Service records are sorted by date. The recent record is listed at the top. The search box shows up once you create the first record so once you have a long history of records you can easily search for specific records.
Click directly on the record.

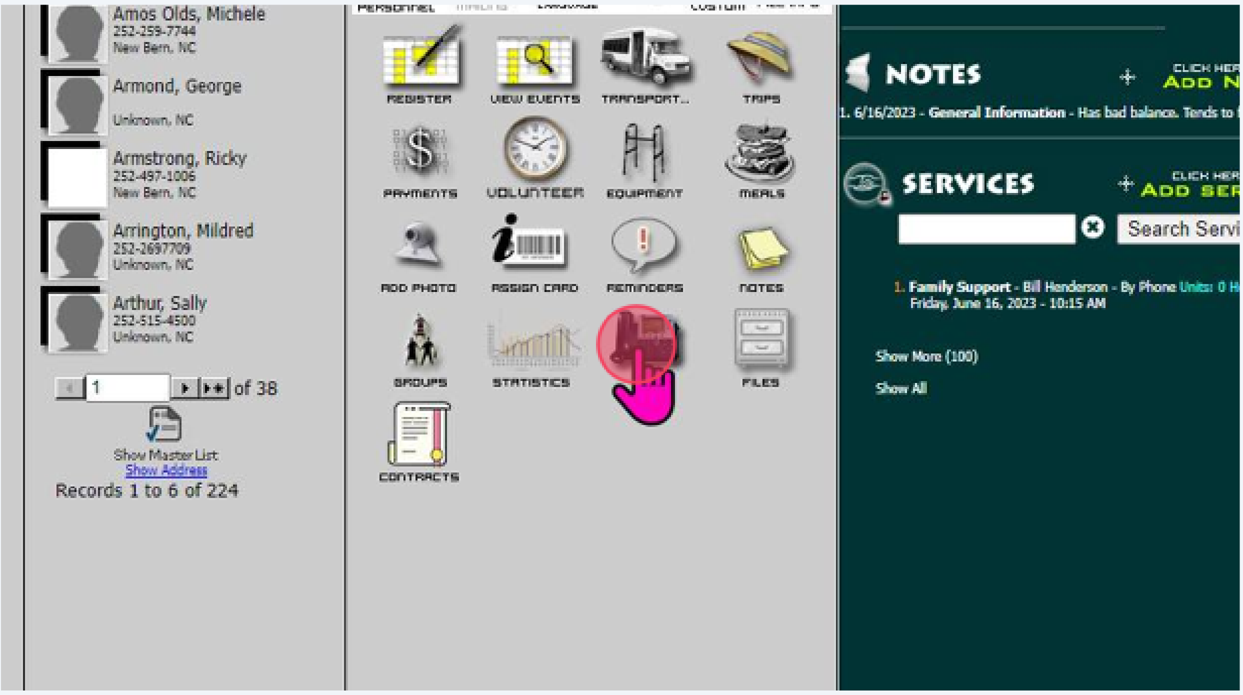


73 Here you can see all the details for the record. You can also see the edit, delete and print buttons.
Close the window.

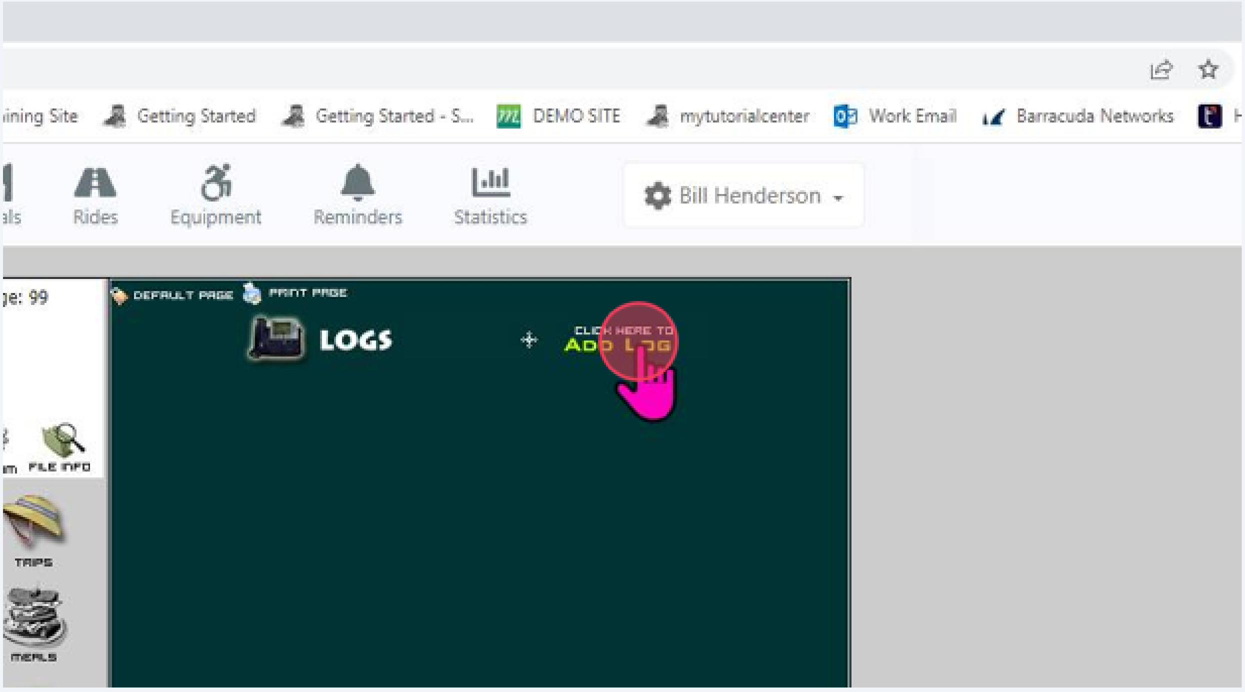


The Logs Icons

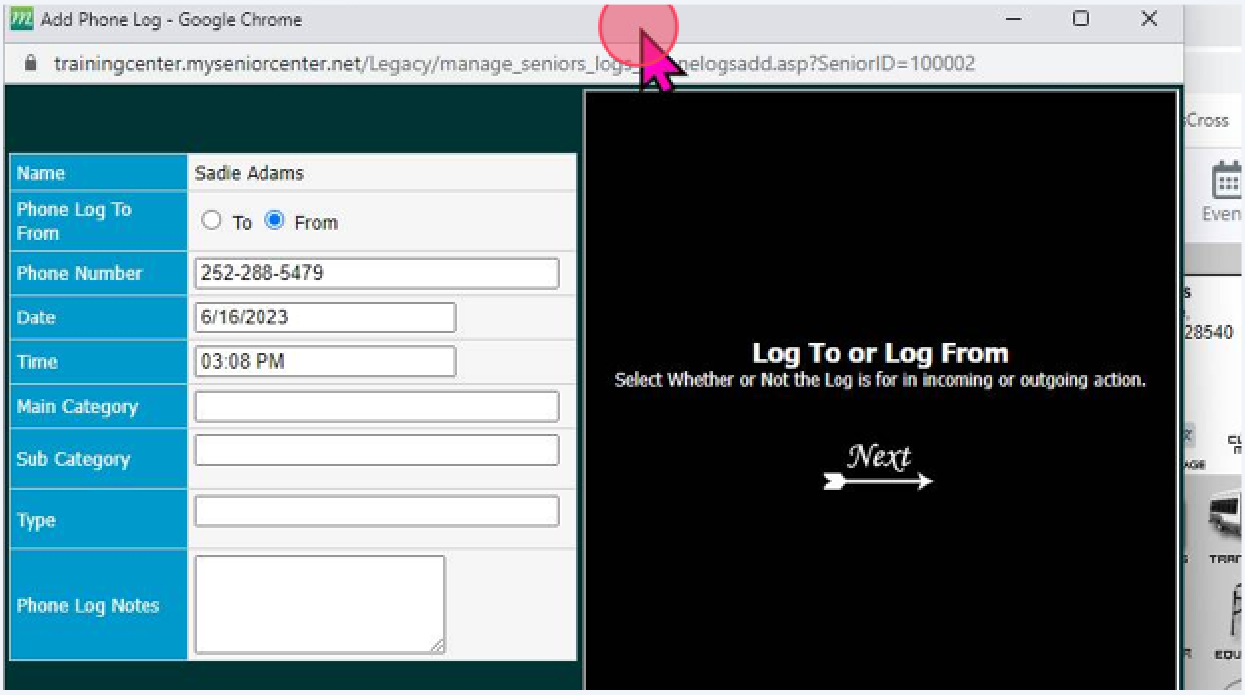
74 Click the "Logs" Icon



75 Logs is designed to keep track of non confidential interactions with people. Many centers rely on statistics about phone calls for grant reporting. Logs allows you to keep track of all of the other types of interactions that are non service related. No center is putting in a log for every call. If someone calls to ask what time you're open for example, you're not going to log that call. Logs is intended for things that you're spending a little bit more time with or maybe you're going to want to reference back to some notes because this person tends to call about this a lot. That's what logs is for.
Click "Add Log".

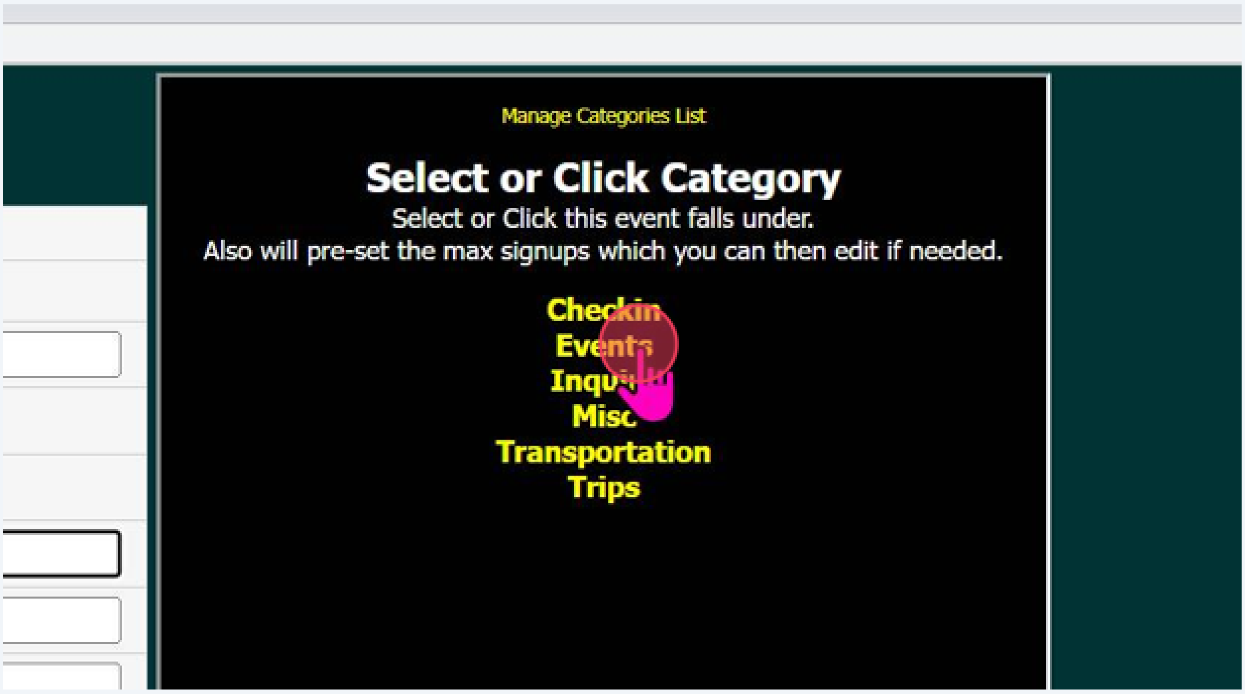


76 Here we can see the person's name and phone as well as date and time. Phone, Date and time can all be changed. You will be choosing from lists again. Just like with services. These lists can all be customized just like the other lists we've seen so far.

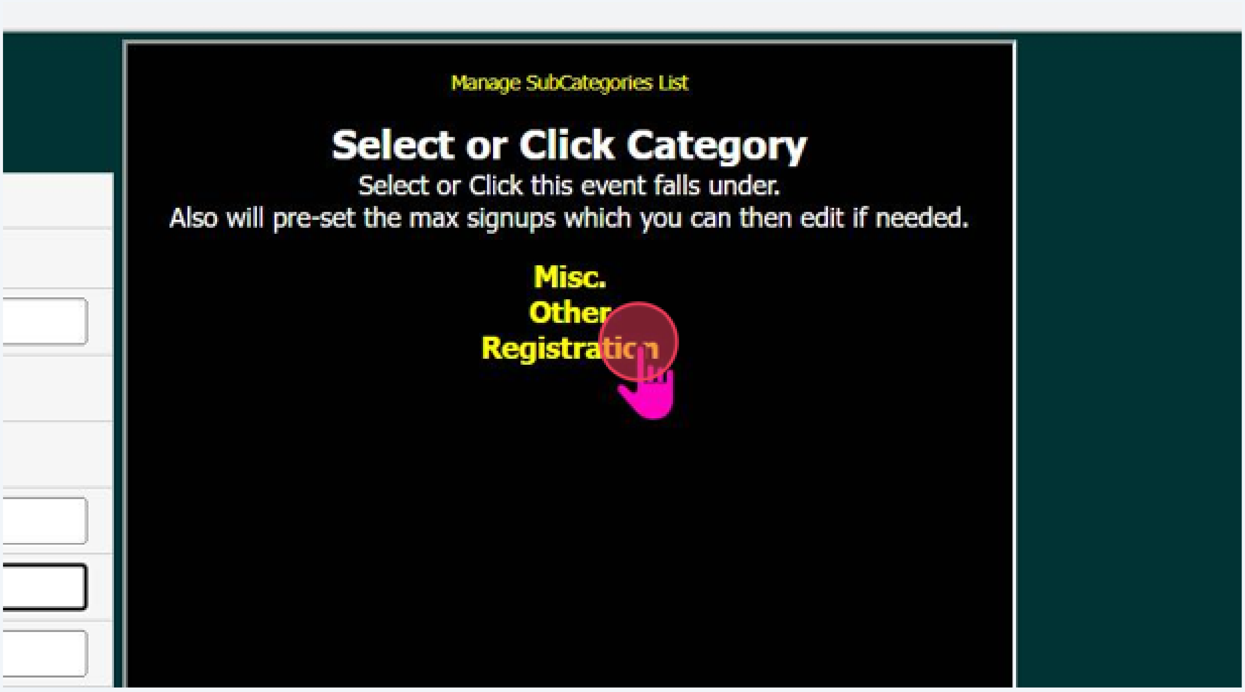


77 To make a choice simply click on the choices in the lists.

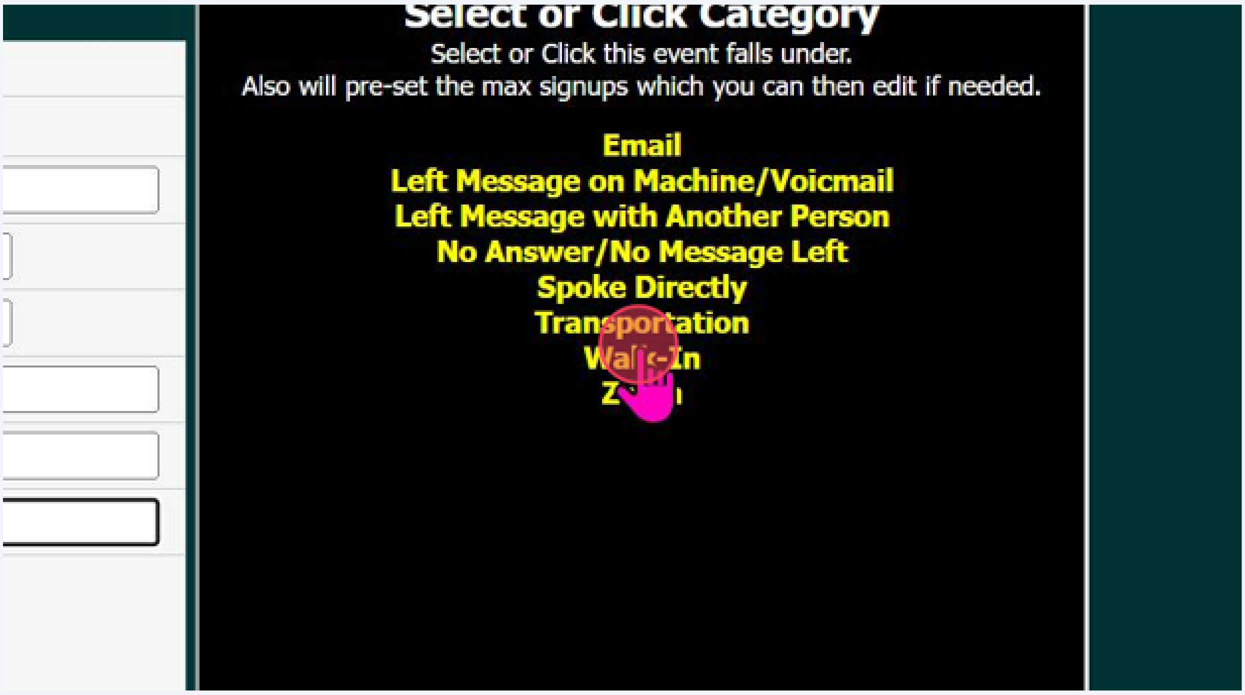
Choose a category



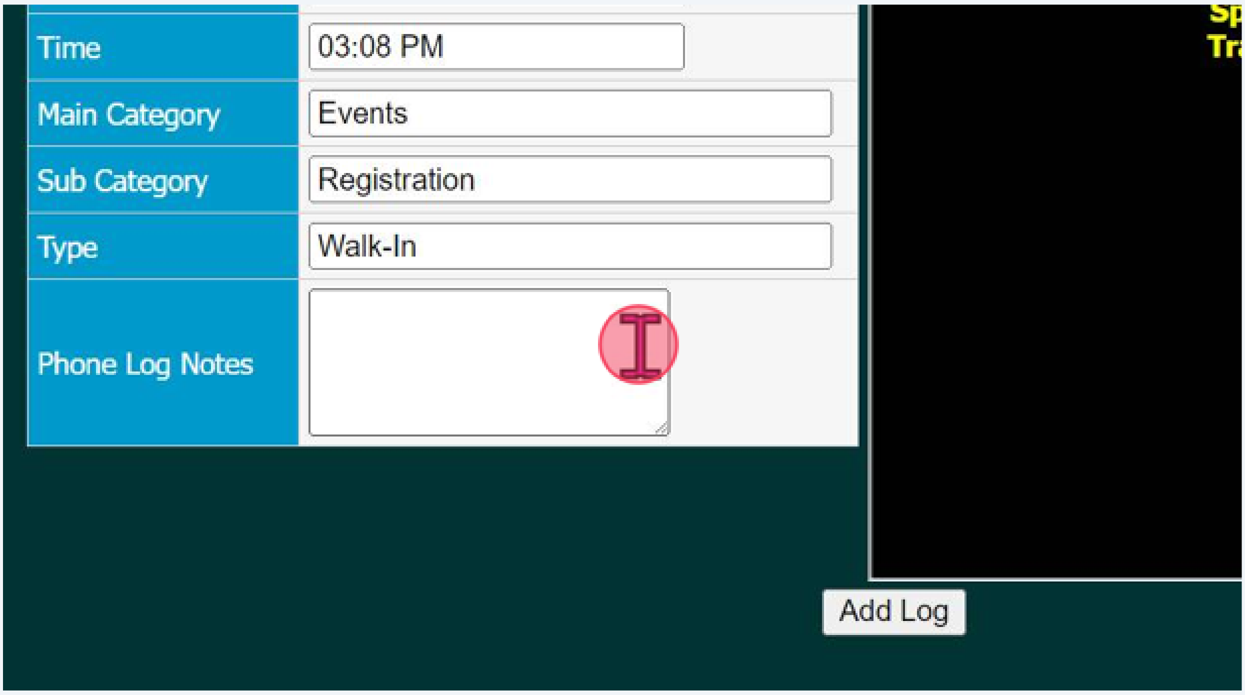
78 Choose a sub-category



79 Choose a type

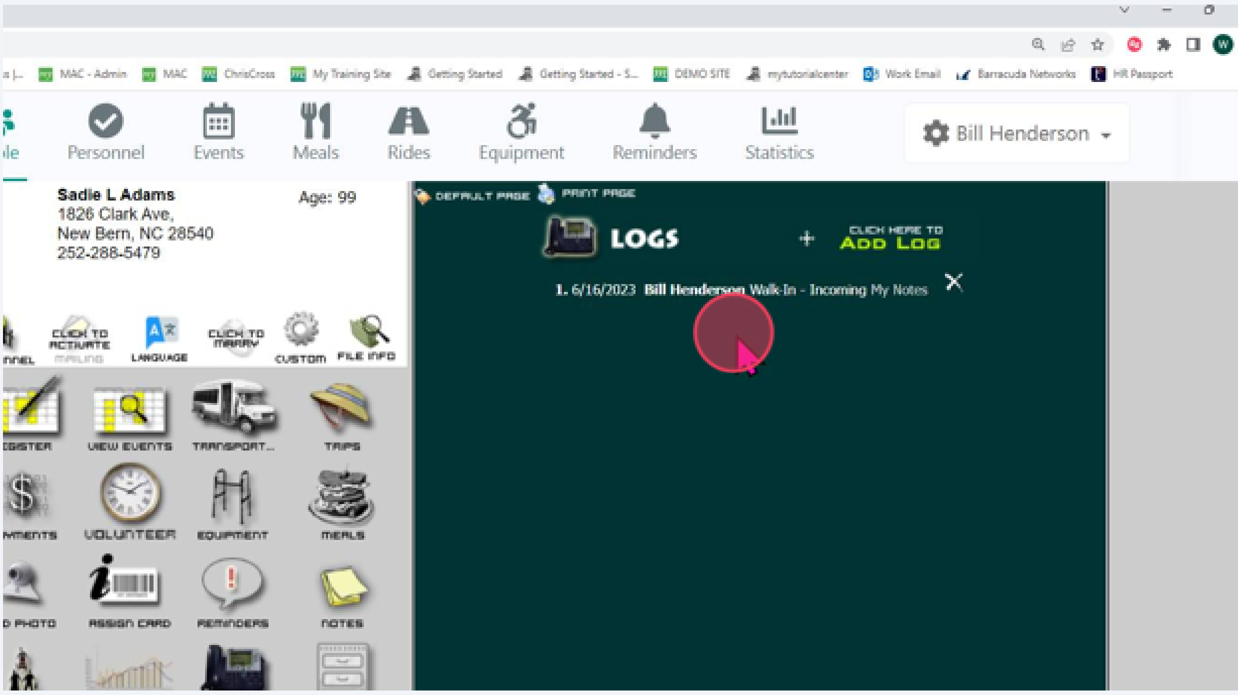


80 Enter your notes

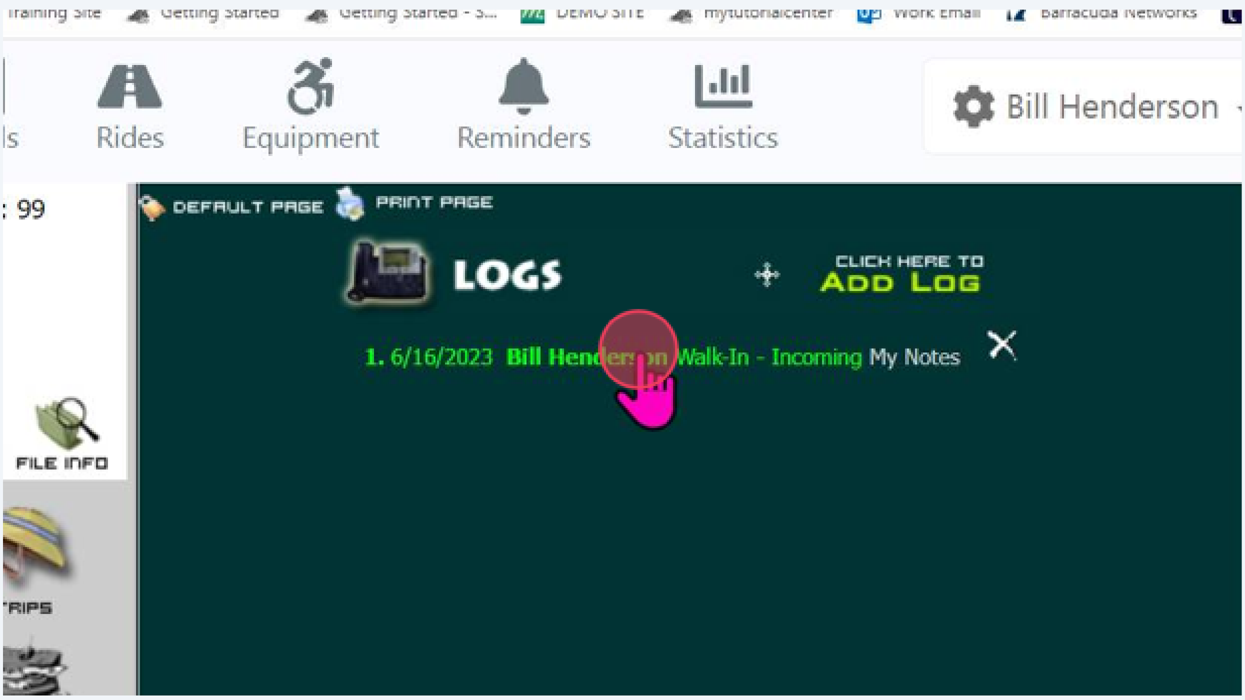


81 Click "Add Log"

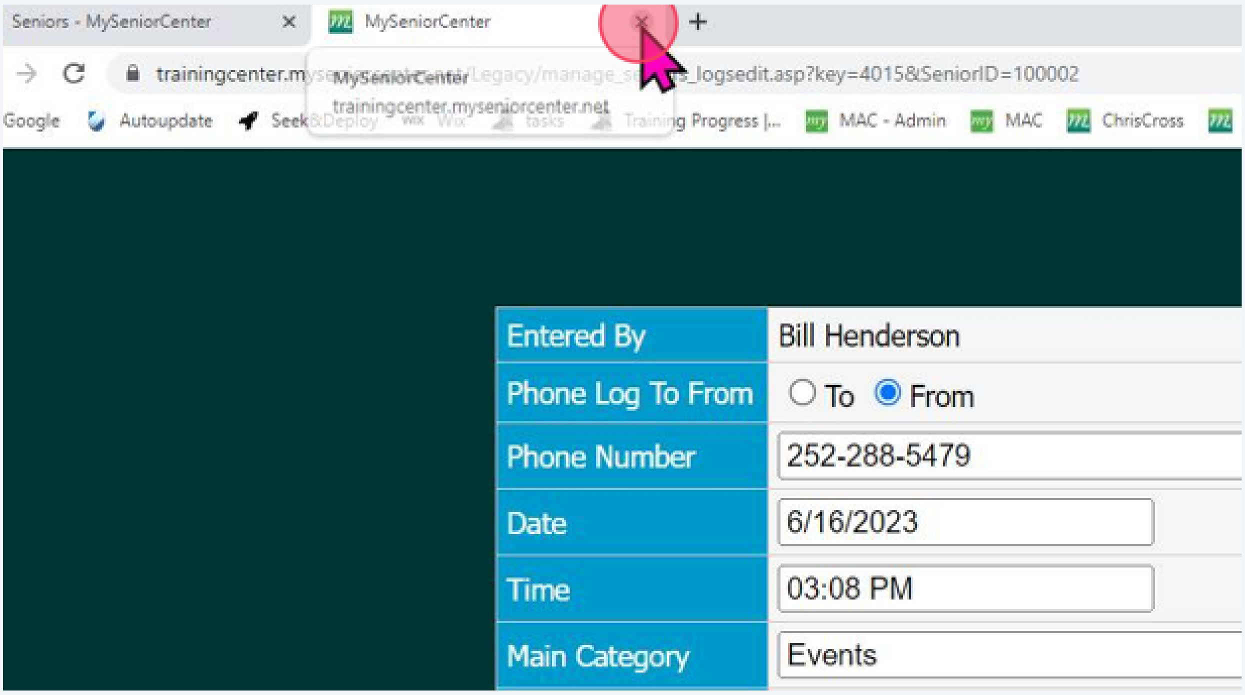
82 Now we can see that log listed there along with your name and the date. Logs are sorted by date and the most recent log is listed at the top. All staff have access to logs and can see all logs as well as the name of the person that entered the log. Logs provide full statistics.



83 Click directly on the log.



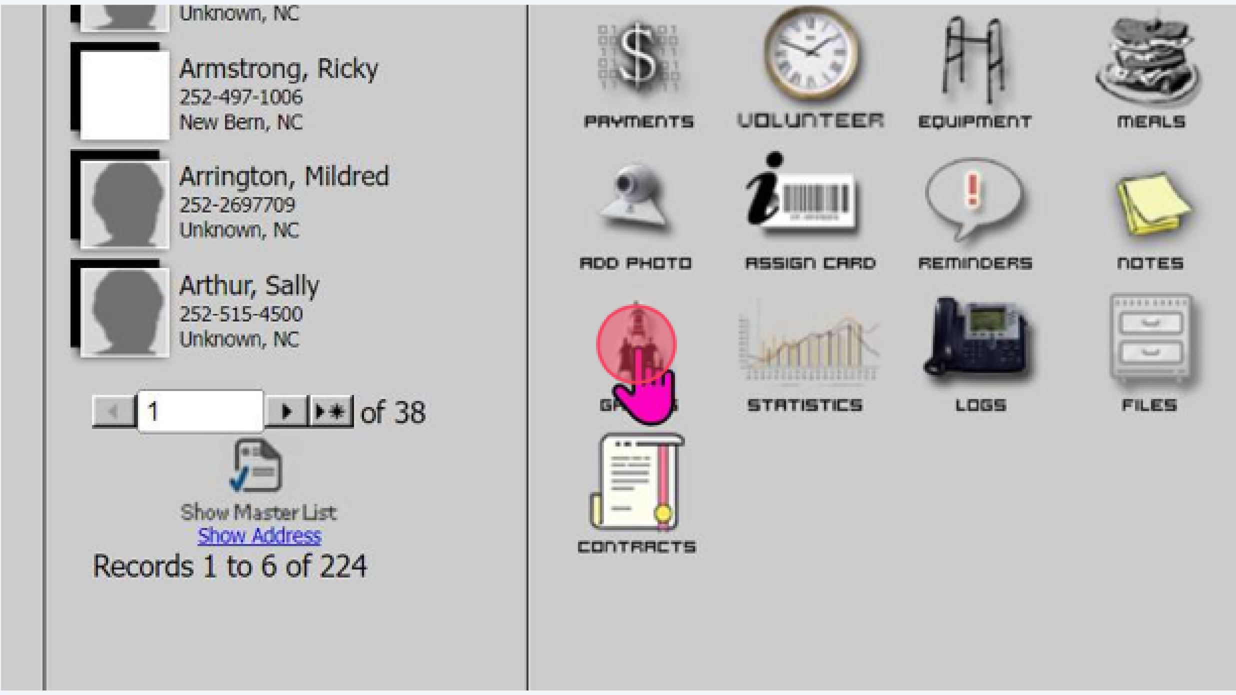
84 Here you can see all the details for the log and make edits.
Close the window.



The Groups Icon

85

The most basic definition of groups is that groups allows you to group people together so that you can perform actions on them as a group rather than as individuals. Actions like sending out a broadcast call to everyone in the group or sending an email or a text or creating mailing labels for everyone in a group or using that group as a filter when you're running statistics. You can even leaving a message at the touch screen for everyone in that group. There's many reasons for creating a group.



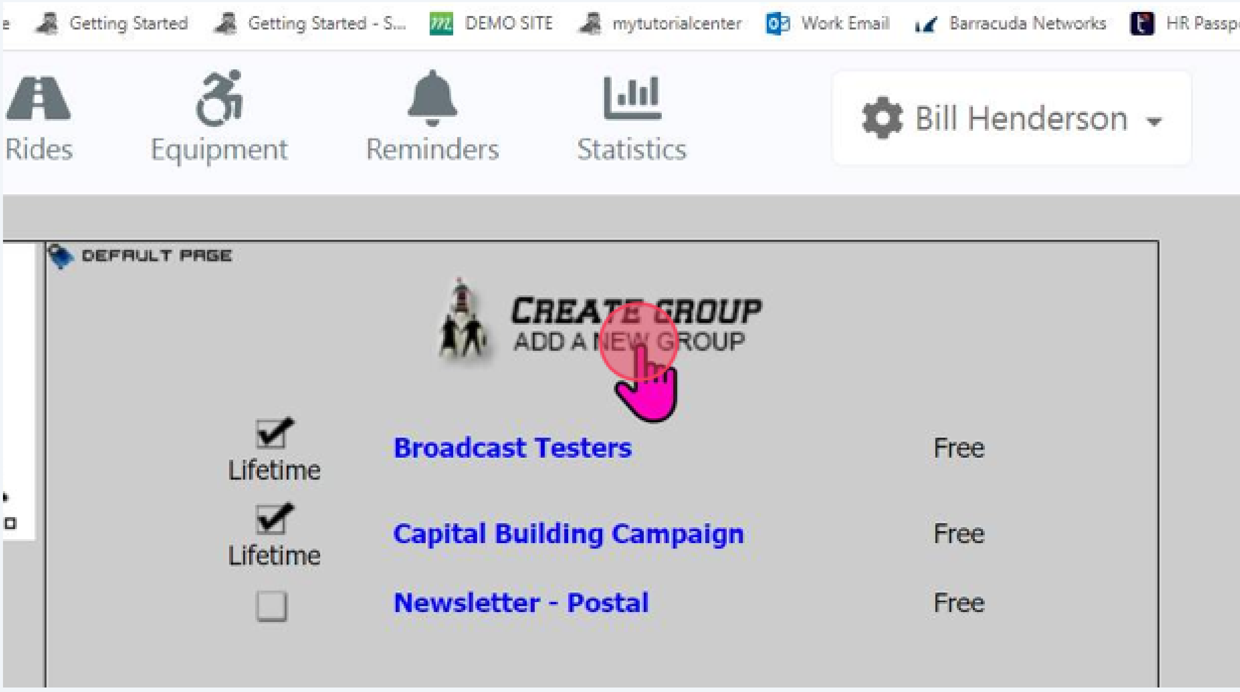
86

To take someone out of a group simply uncheck the box

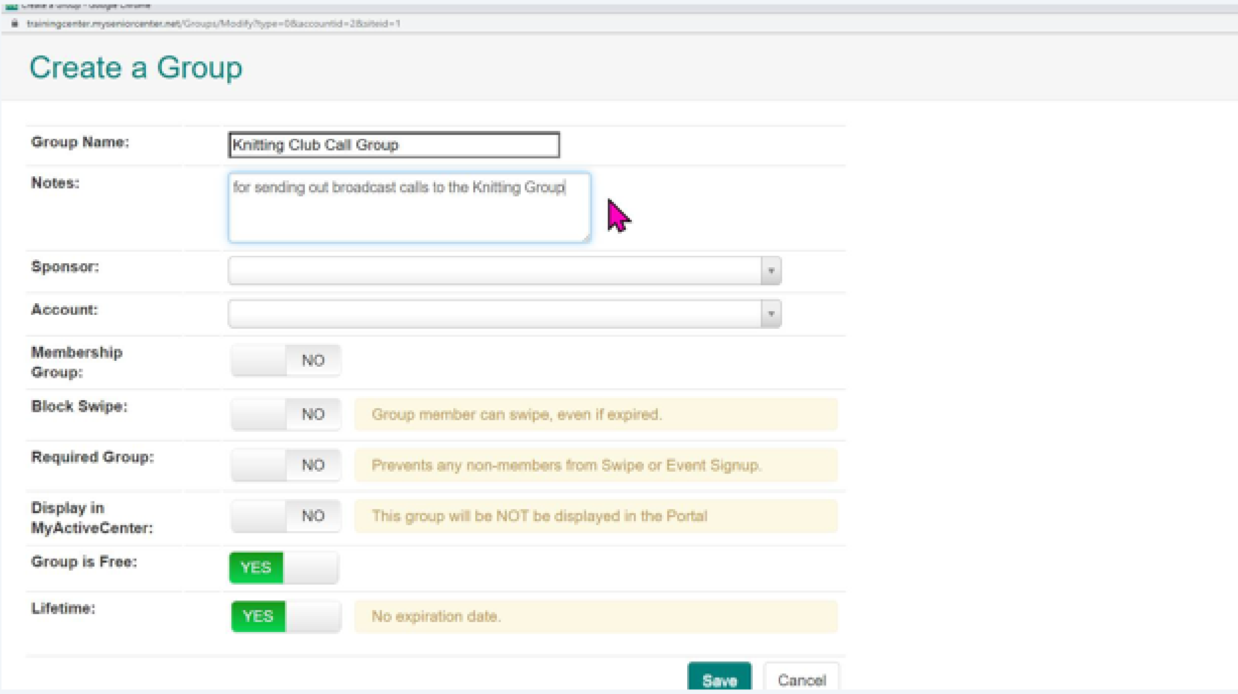
87 To add someone to a group check the box

88 On the person level that's about all you're doing. You may be coming in to add someone to a group, take them out of a group, or maybe you're just coming in to see what groups they belong to. There is no limit to how many people can added to a group and there is no limit to how many groups a person may be in.

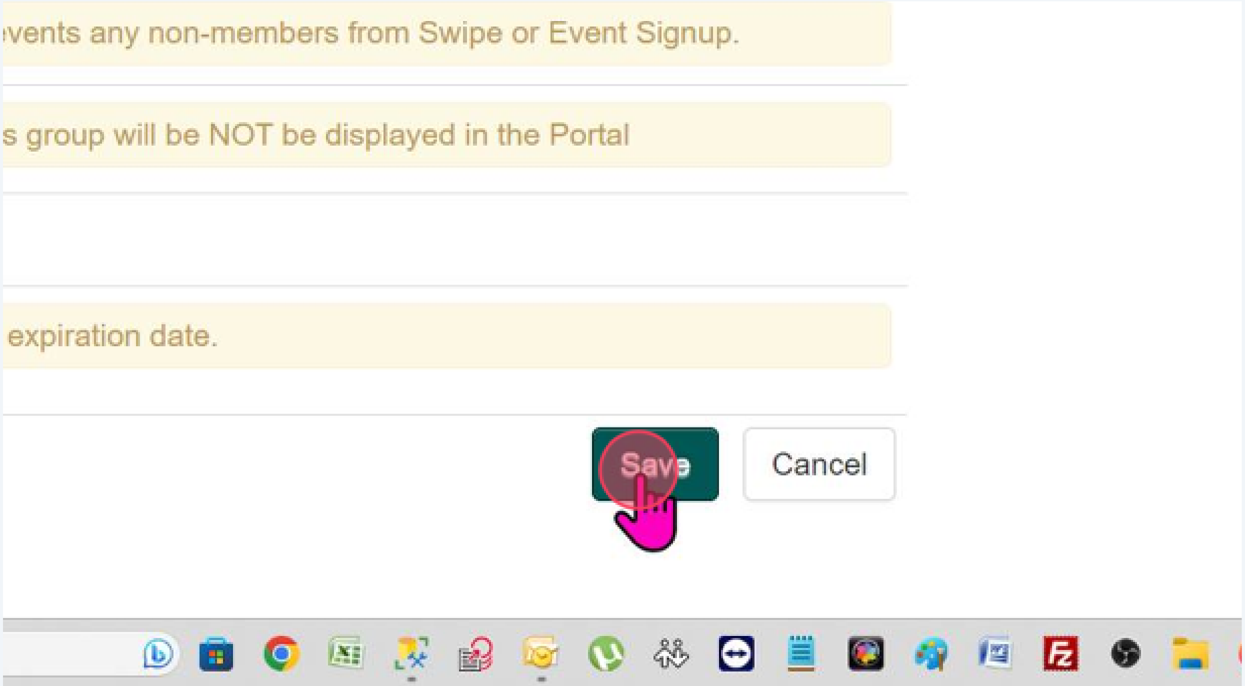
Click create group.



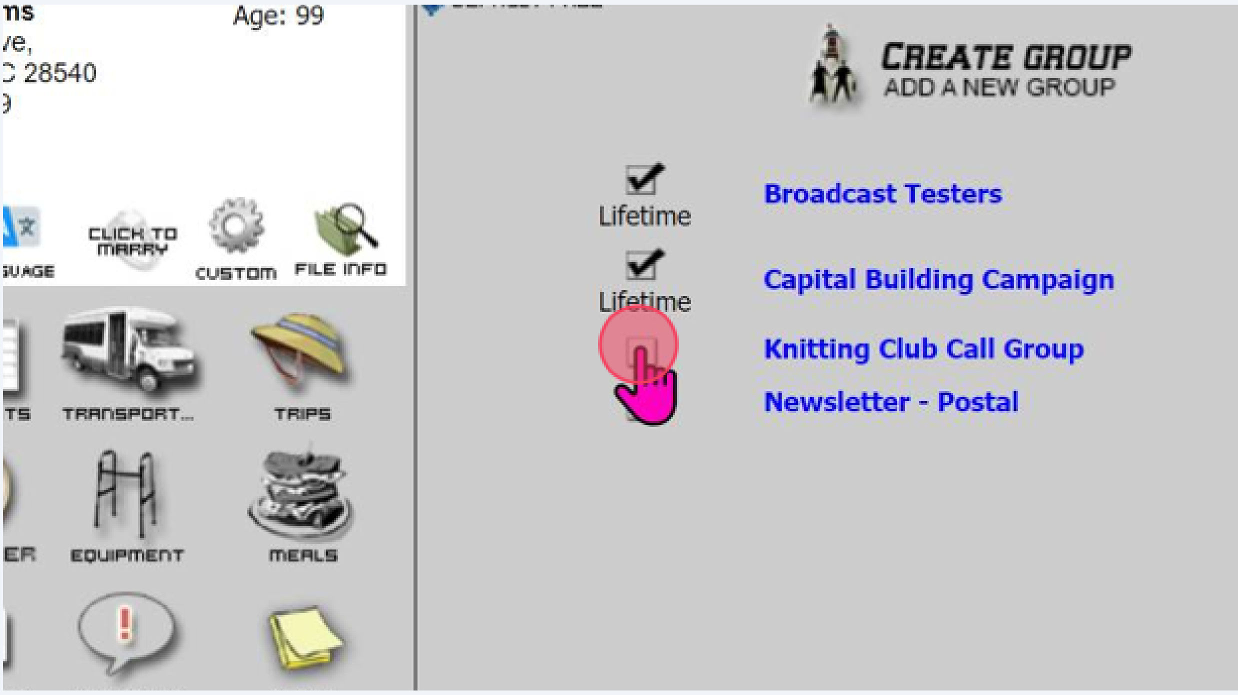
89 There are two types of groups. There's a simple group and there's a membership group. We're going to talk about simple groups first. With a simple group. All you have to do is give it a name and enter some notes. It's highly recommended that you do enter notes. These notes are really not for yourself but more for others and people in the future. This will cause less confusion down the road. Optionally you can choose from a list of sponsors. If you've created one. You can choose a payments received account to allocate any payments you're taking in from this group. The Membership Group setting is a simple yes or no. If you change it to yes there will be a badge next to the person's name in their profile under the people tab if they are in this group. With block swipe changed to yes, this means that when someone's membership has expired the touch screen will no longer allow them to check in. Changing required group to yes means anyone checking in at the touchscreen is required to be in this group to be able to check in at all. Changing display in my active center to yes will display this group in MyActiveCenter and allow people to add and remove themselves from the group. We'll talk about the other settings in a moment.



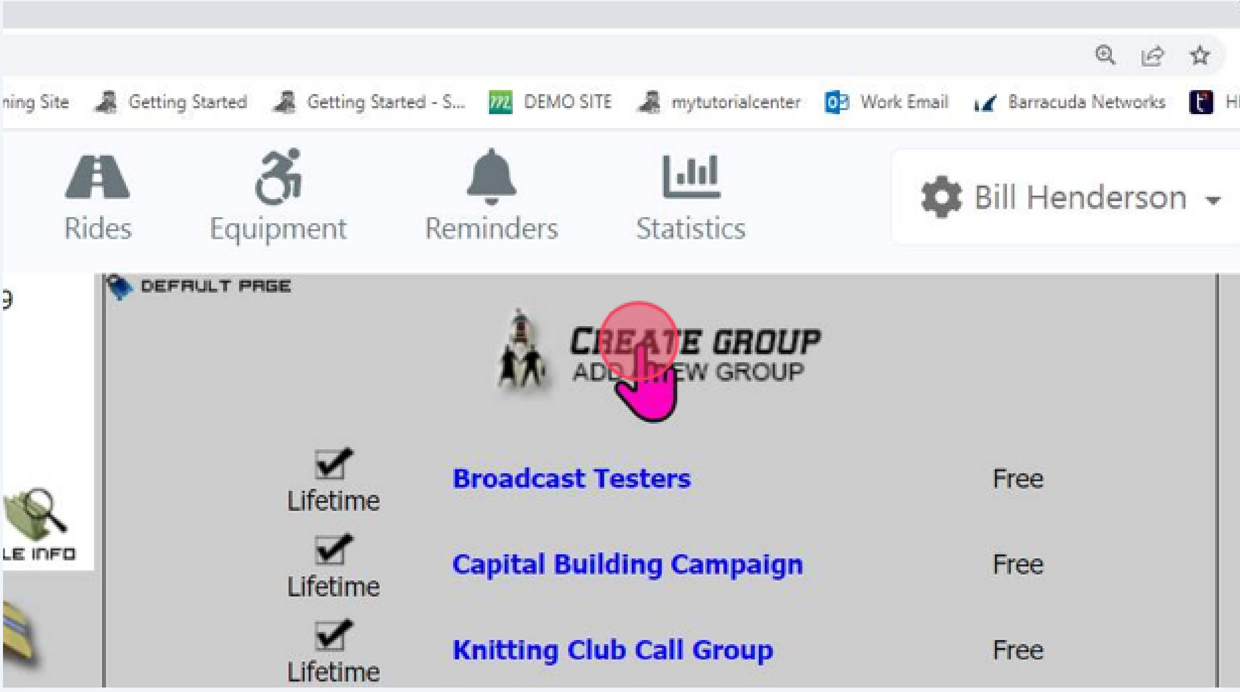
90 Click "Save"



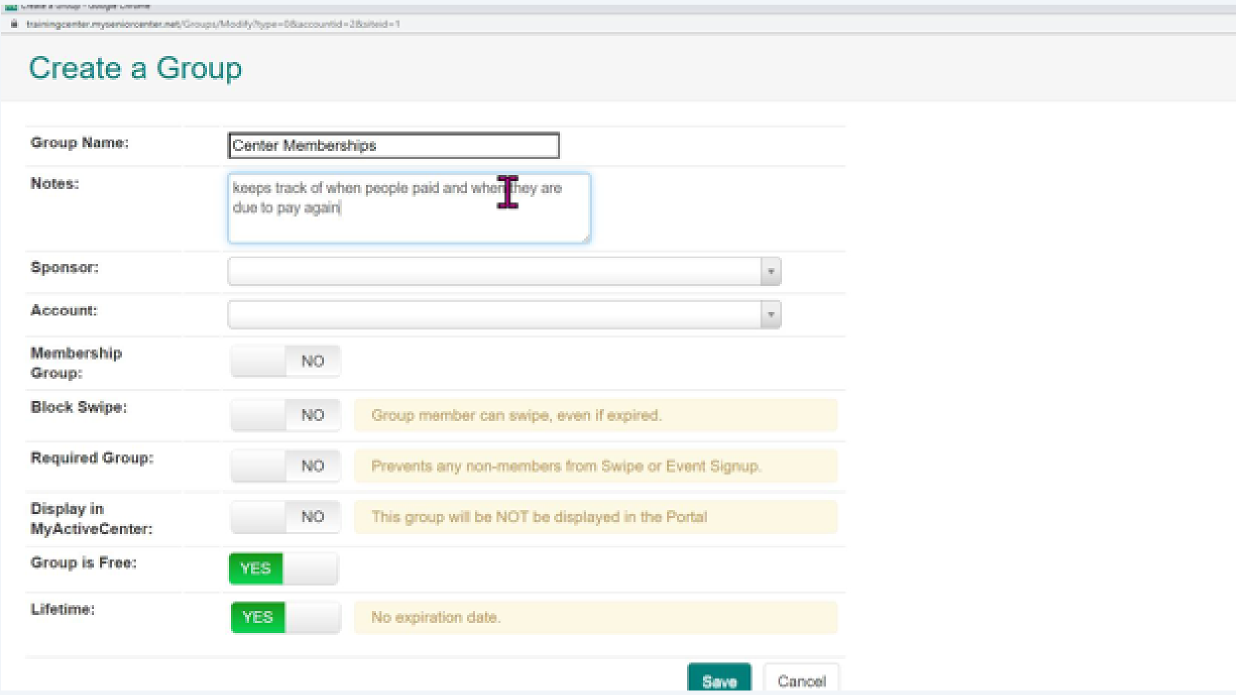
91 Now we can start adding people to that group



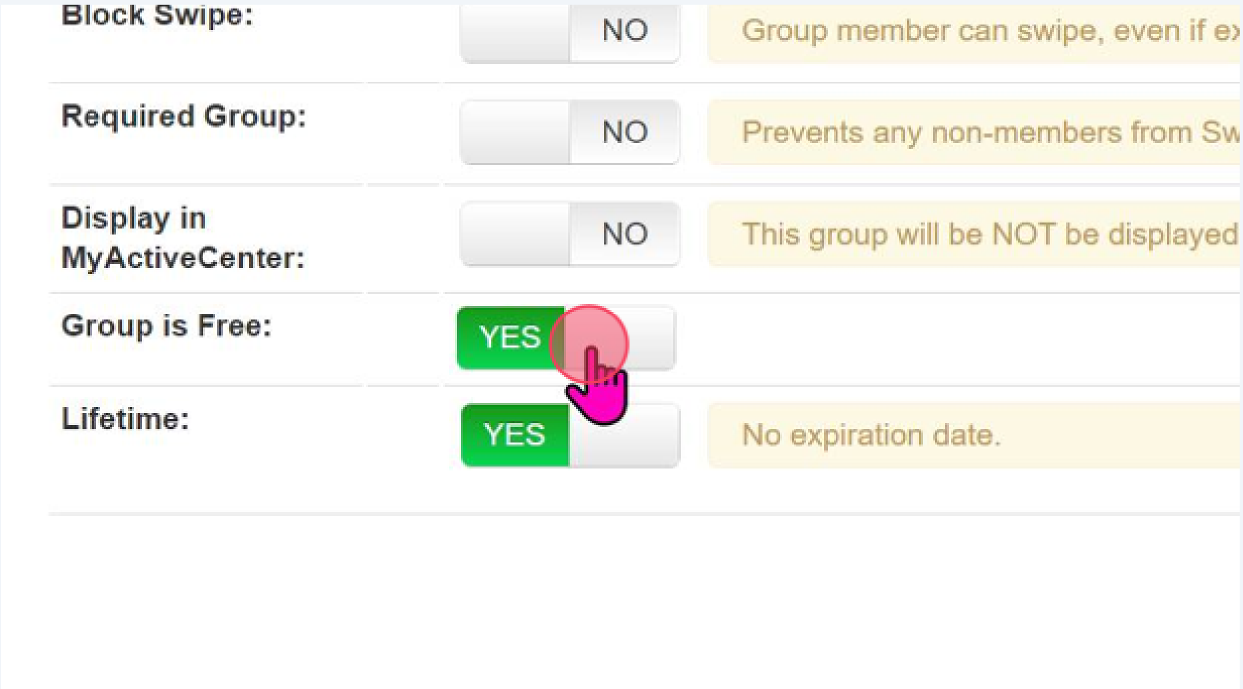
92 Click create group again



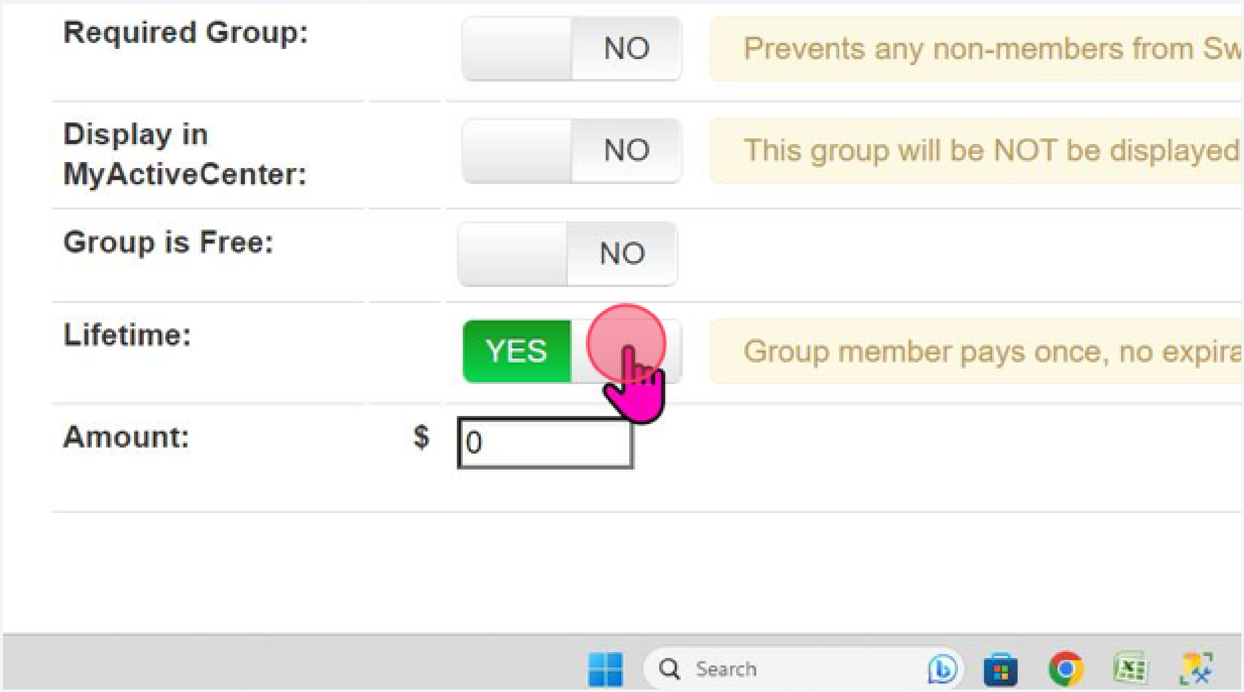
93 Let's name this group center membership and we'll put in some notes that tell people this is to keep track of people's memberships



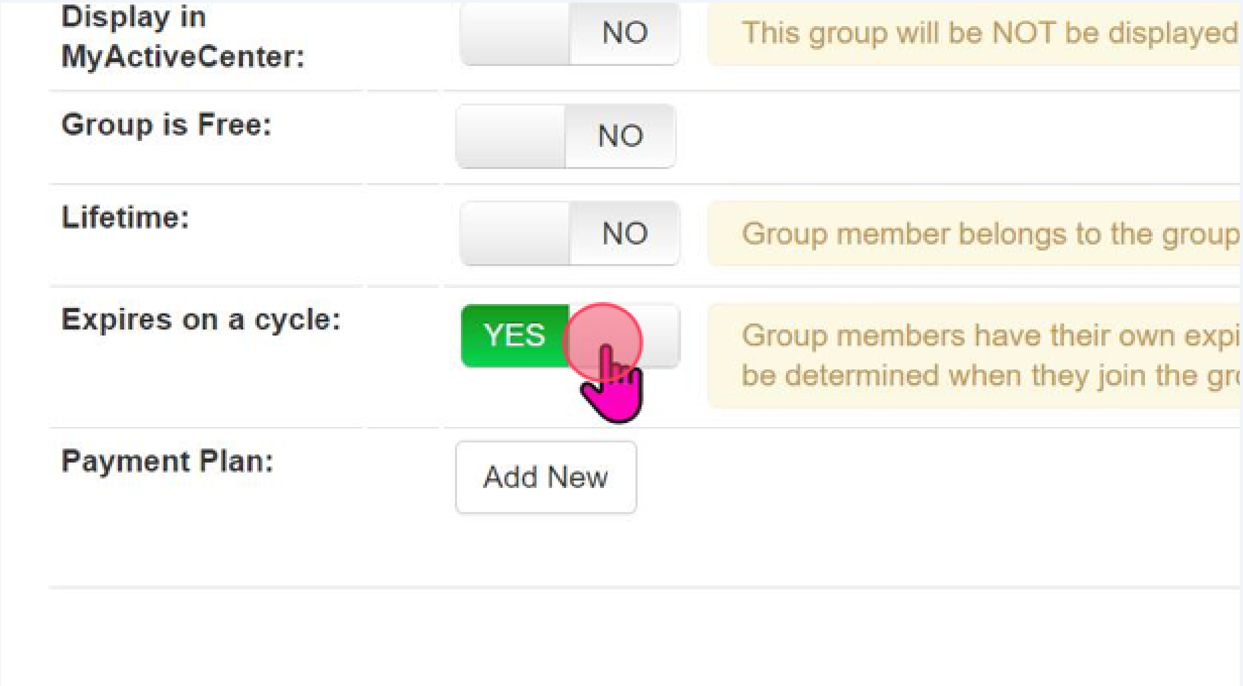
94 Let's change group is free to no



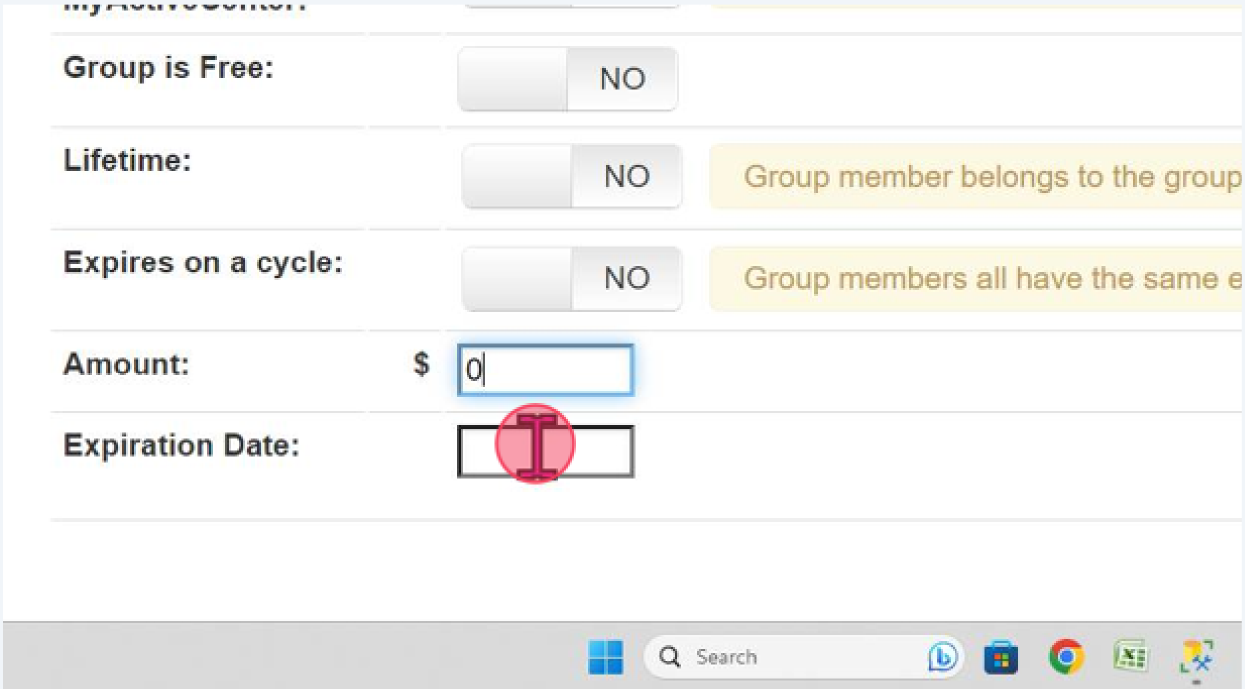
95 With lifetime at yes once a member joins and pays their fee they will be a member for life. Let's change that to no.



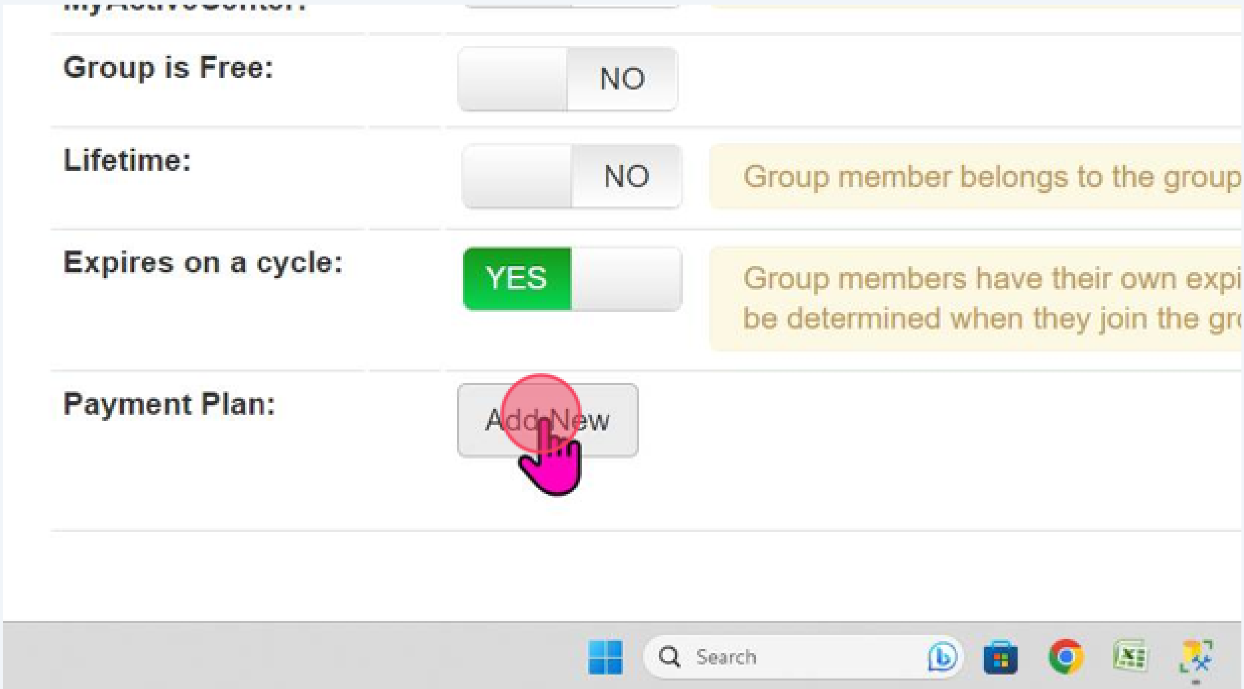
96 Let's change expires on a cycle to no.



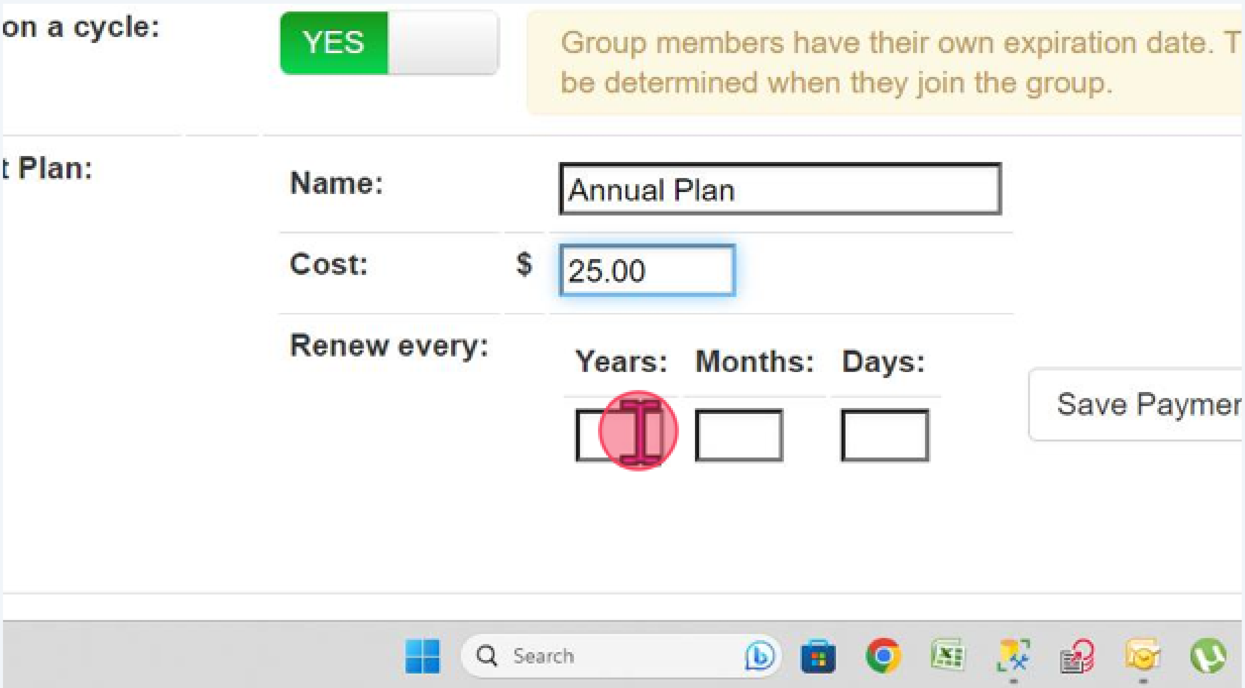
97 With expires on a cycle set to no you will enter in one cost and one expiration date that will apply to everyone in the group regardless of when they are added to the group. Let's change expires on a cycle to yes.



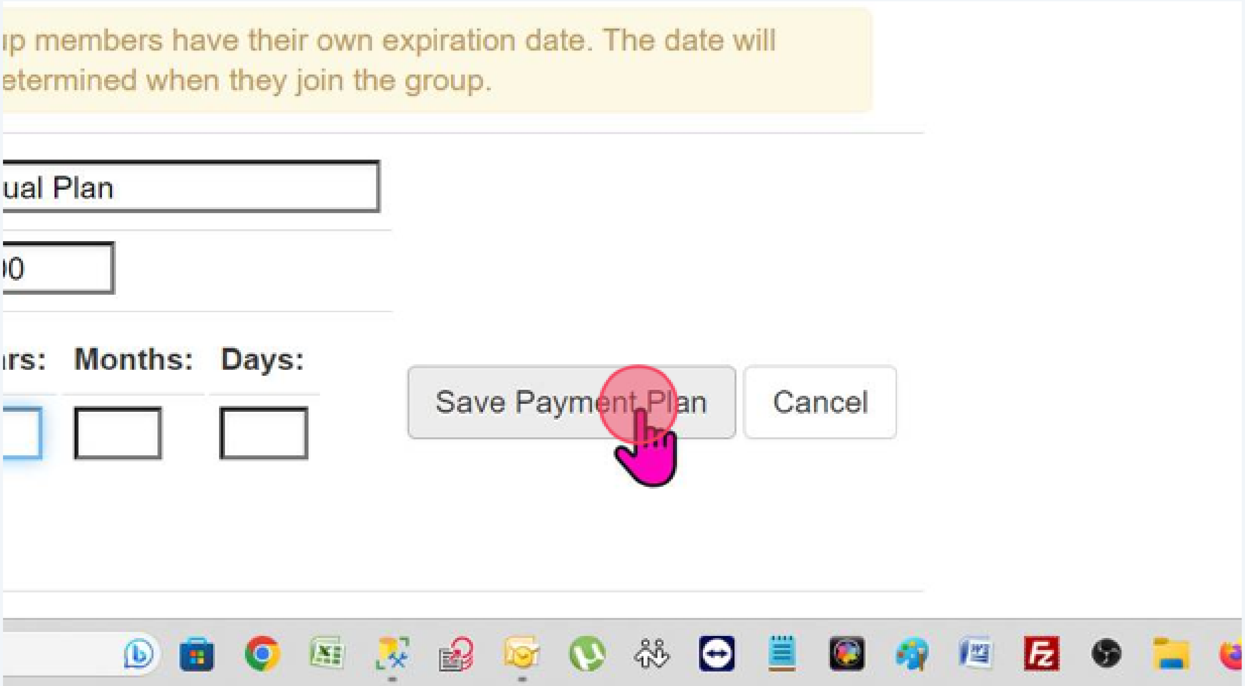
98 Click "Add New" To add a new payment plan.



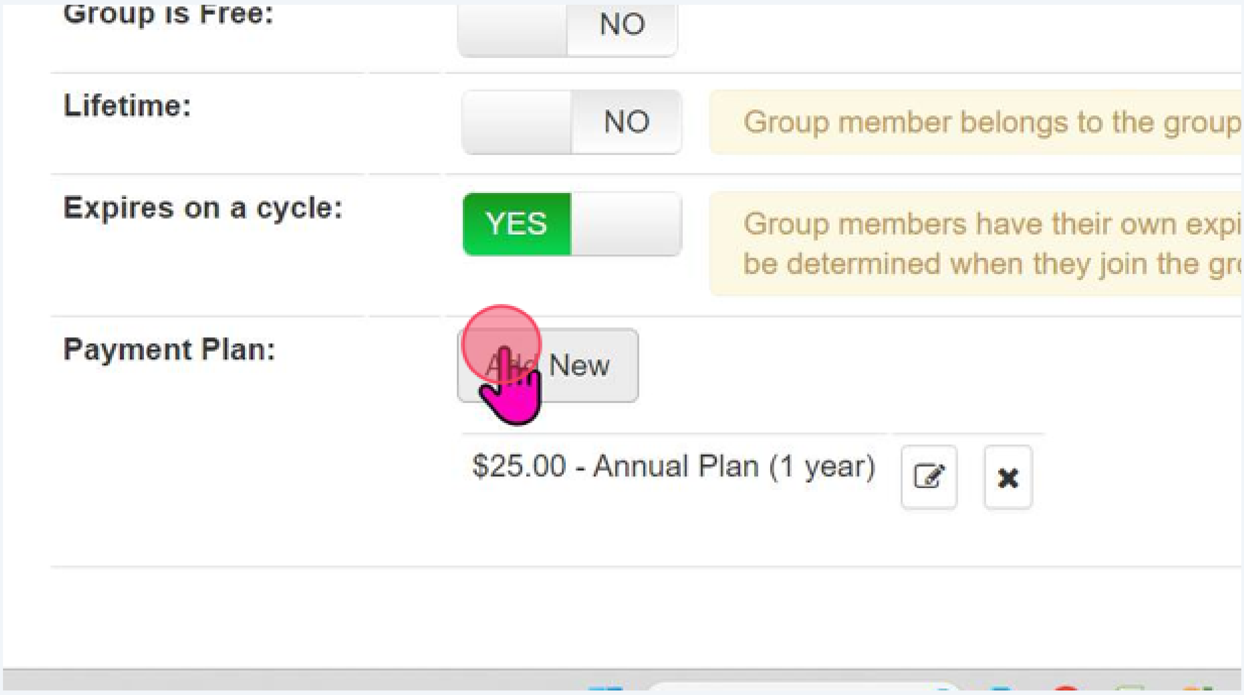
99 Let's give our plan a name and cost and choose a renewal period. You can choose absolutely any renewal period that you want.



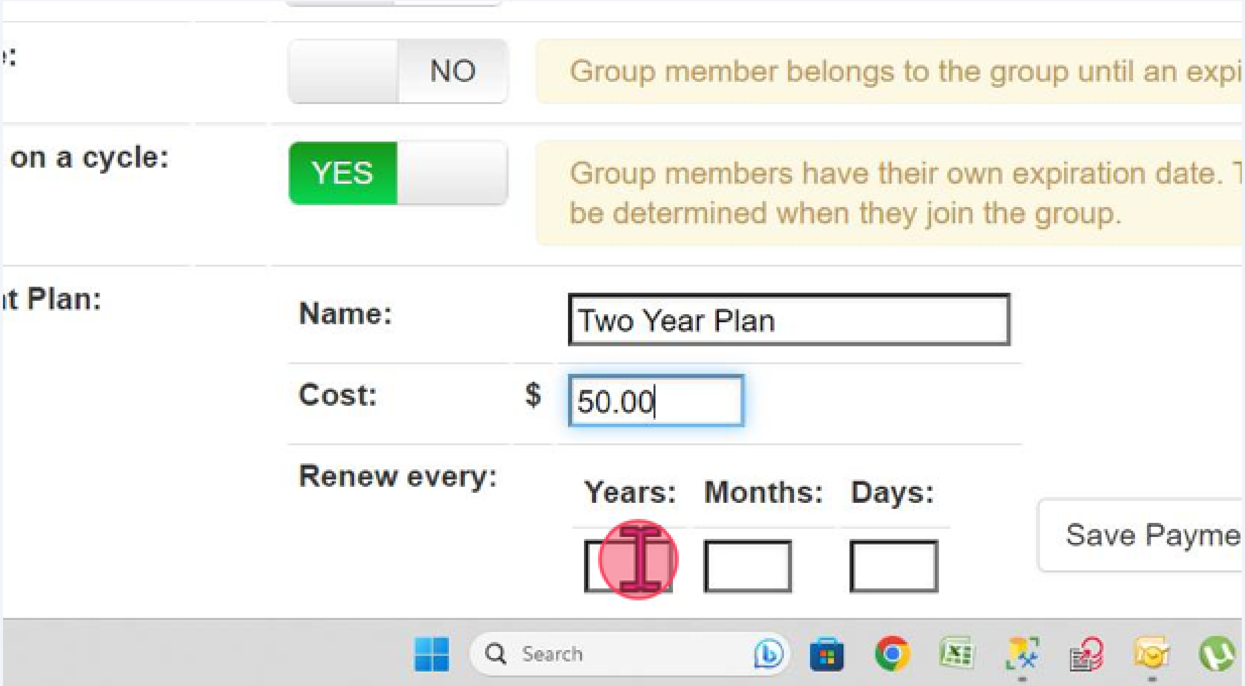
100 Click "Save Payment Plan"



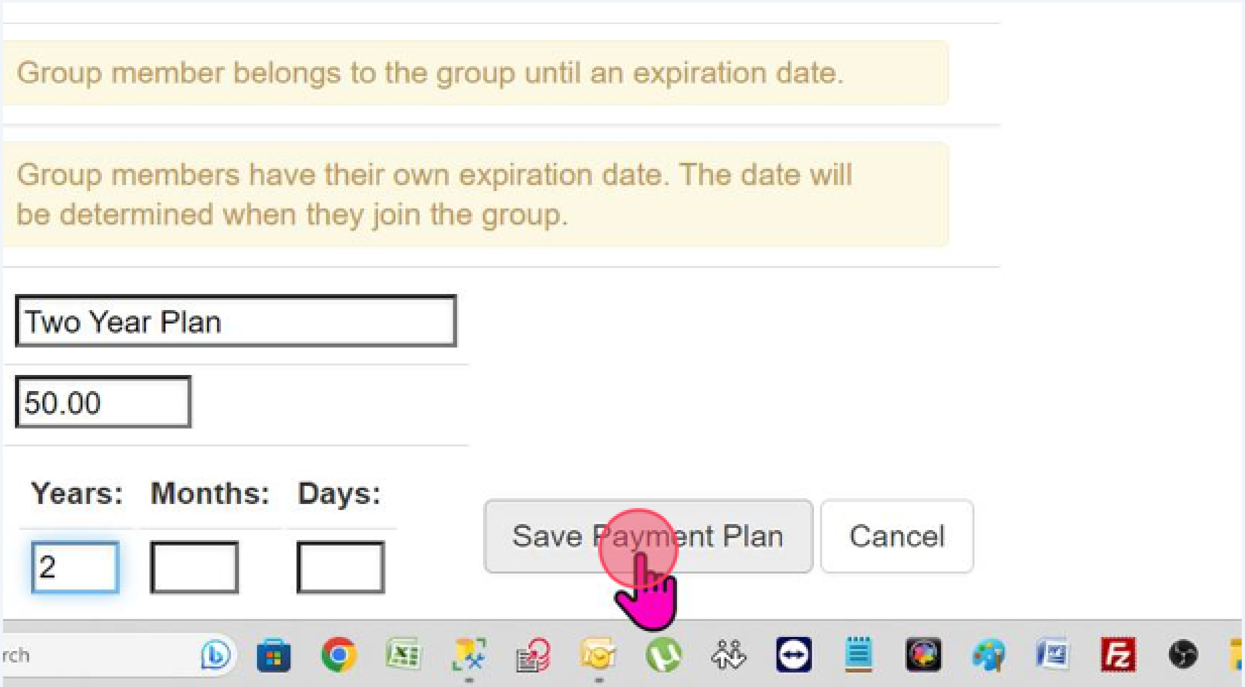
101 Click "Add New" To add another plan.



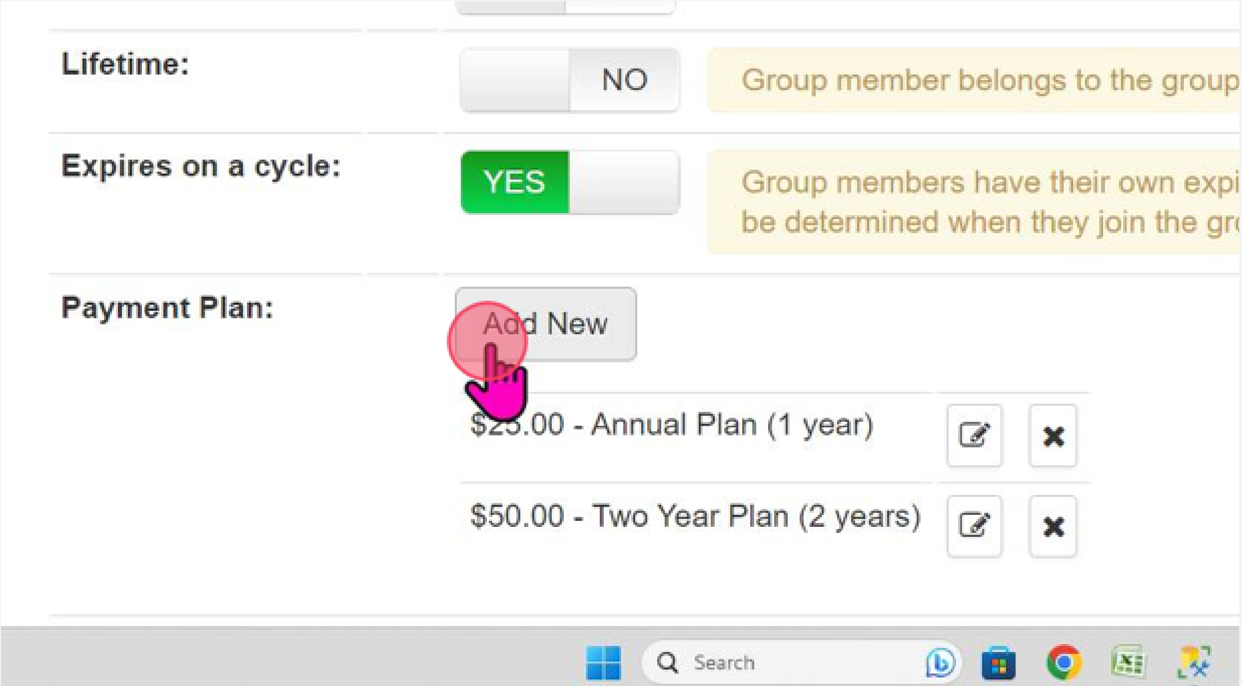
102 Again give your plan a name, cost and a renewal period.



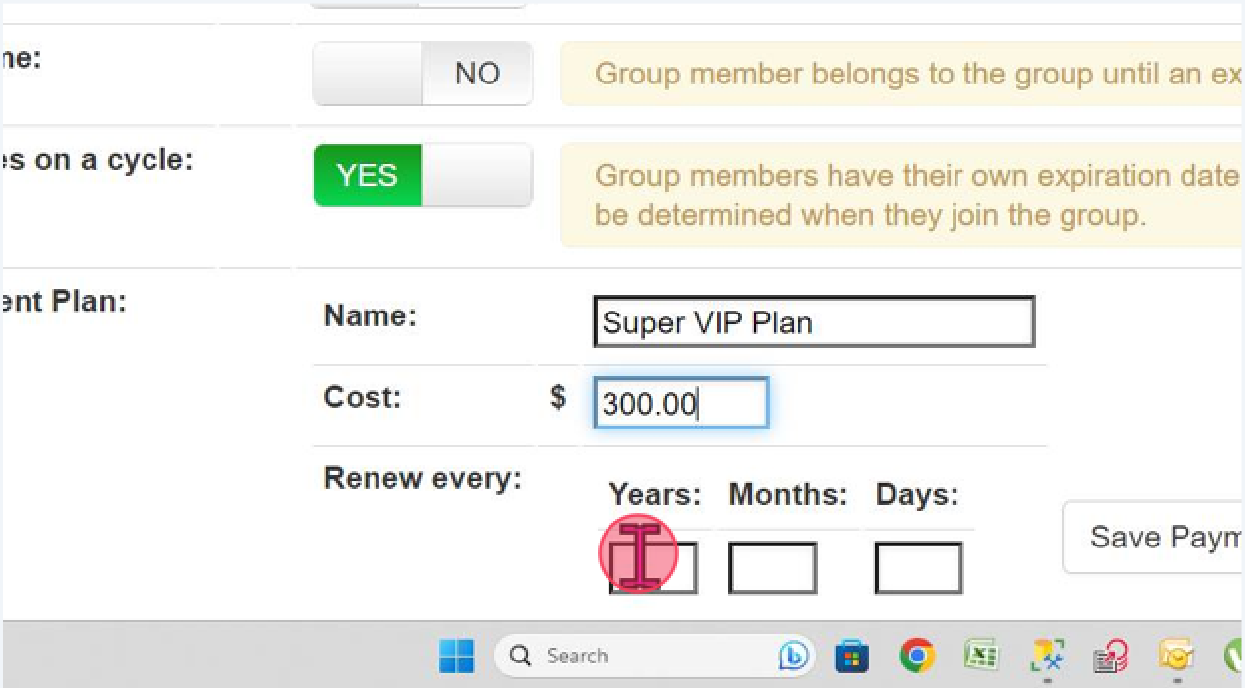
103 Click "Save Payment Plan"



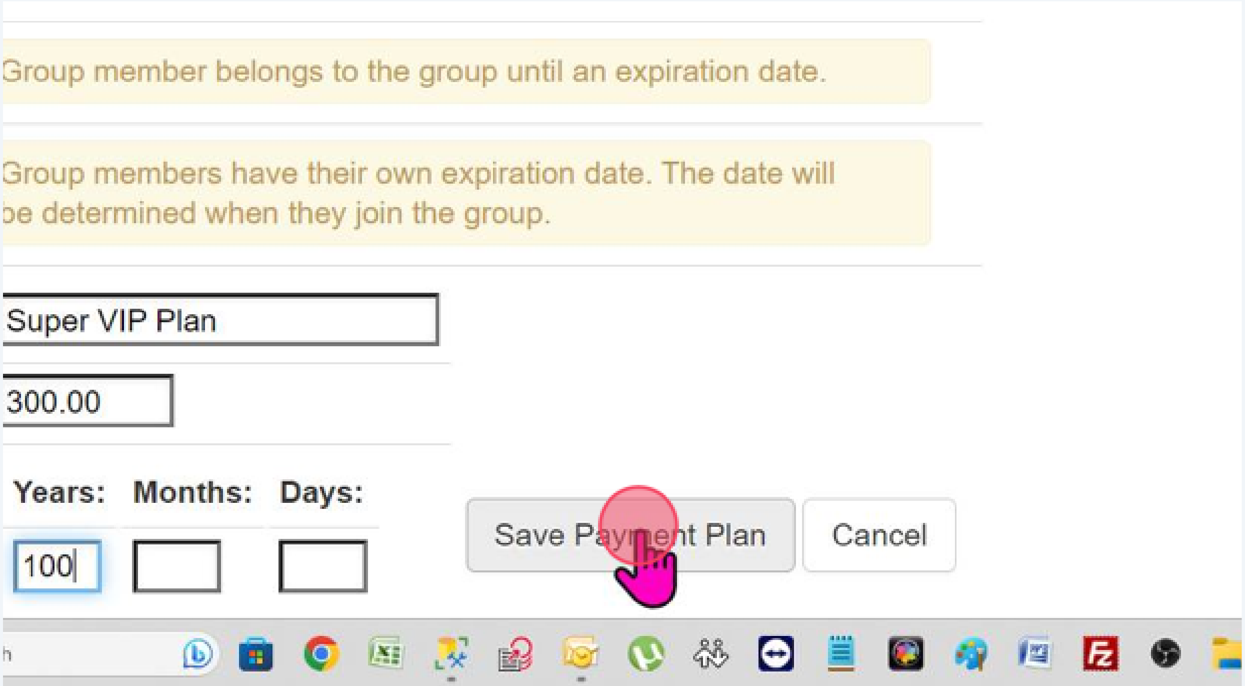
104 Click "Add New" To enter one last payment plan.



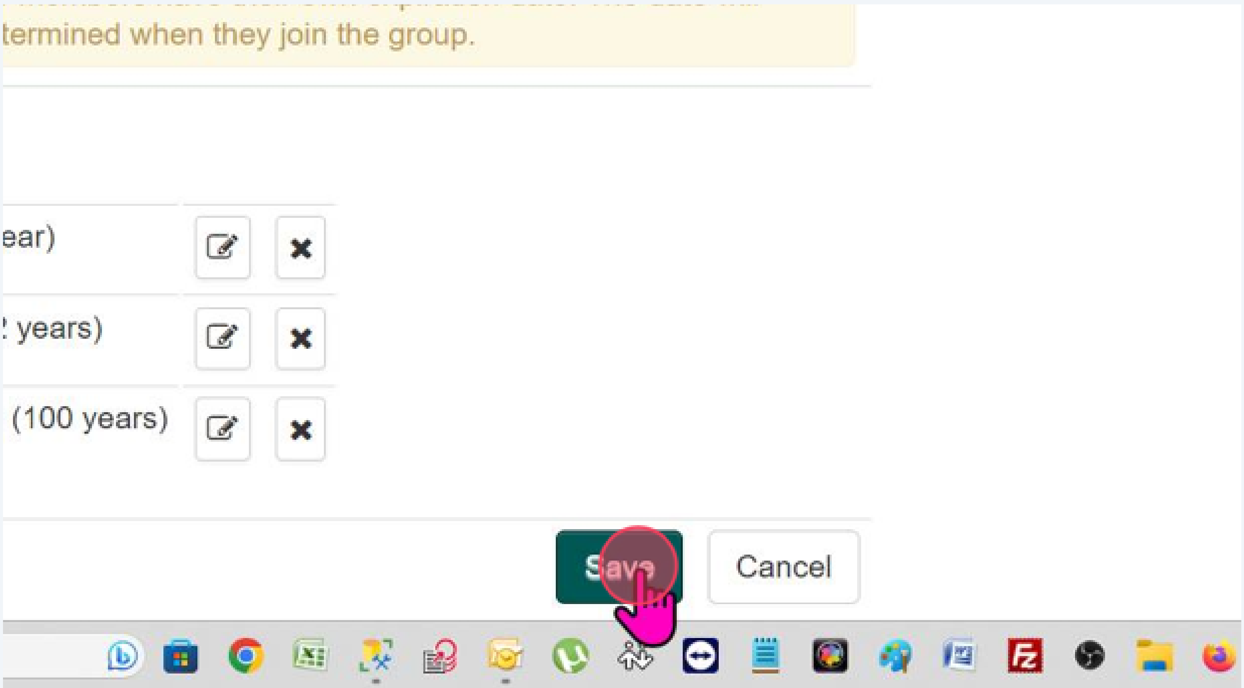
105 And once more give your plan a name, cost and a renewal period.



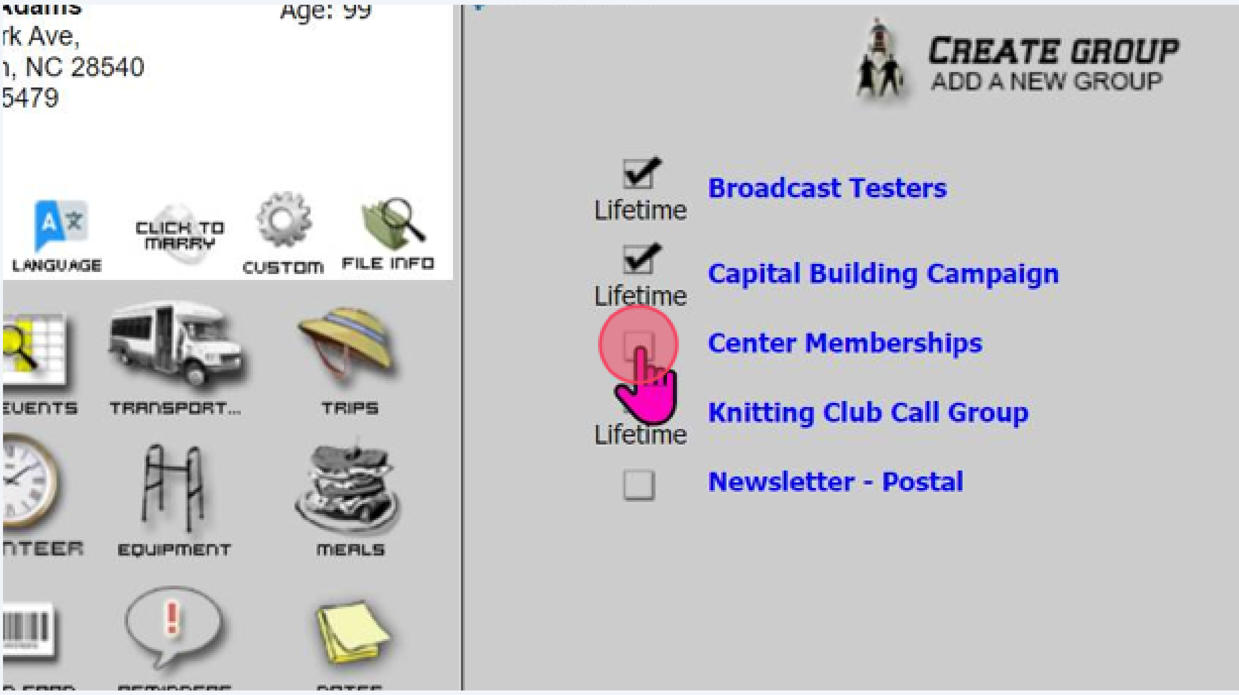
106 Click Save payment plan.



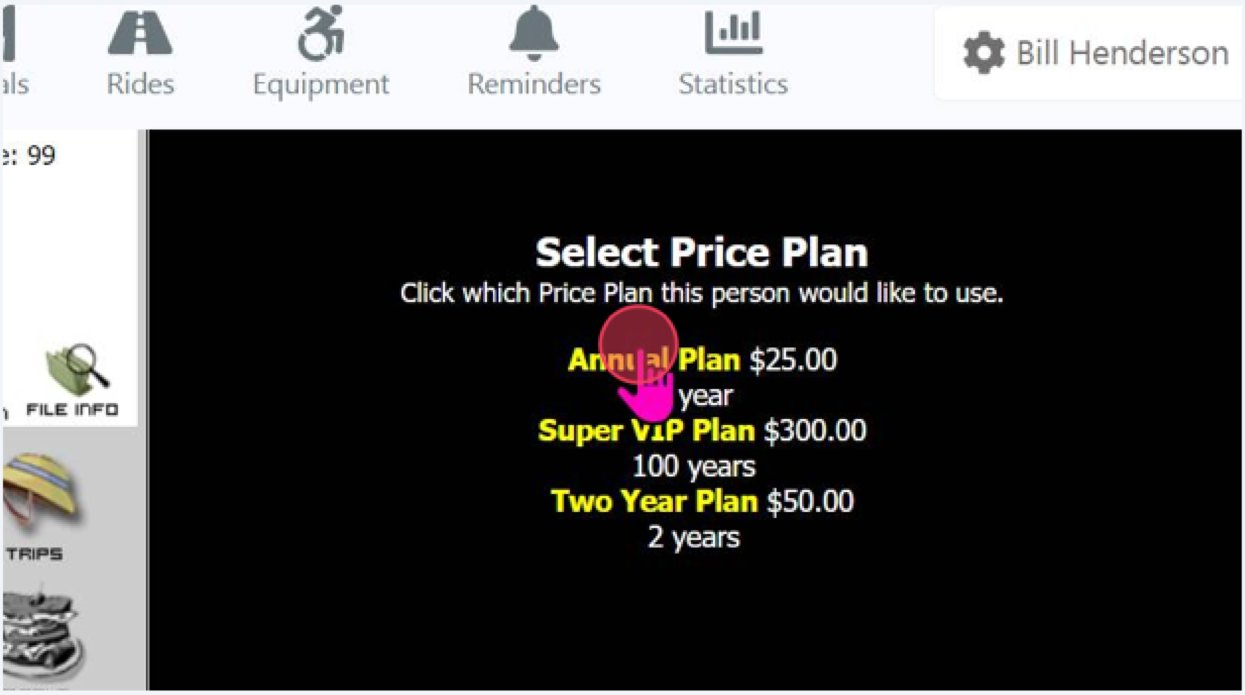
107 Click Save to save the group



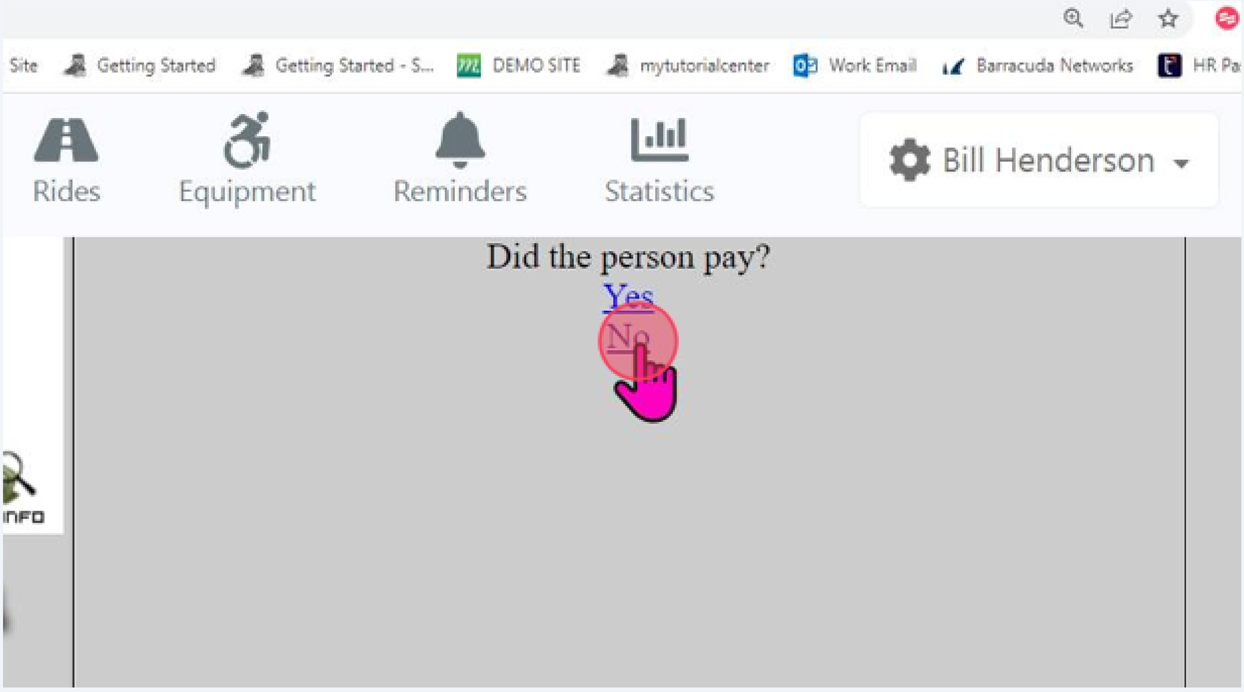
108 Add a person to the group by checking the Box for that group.



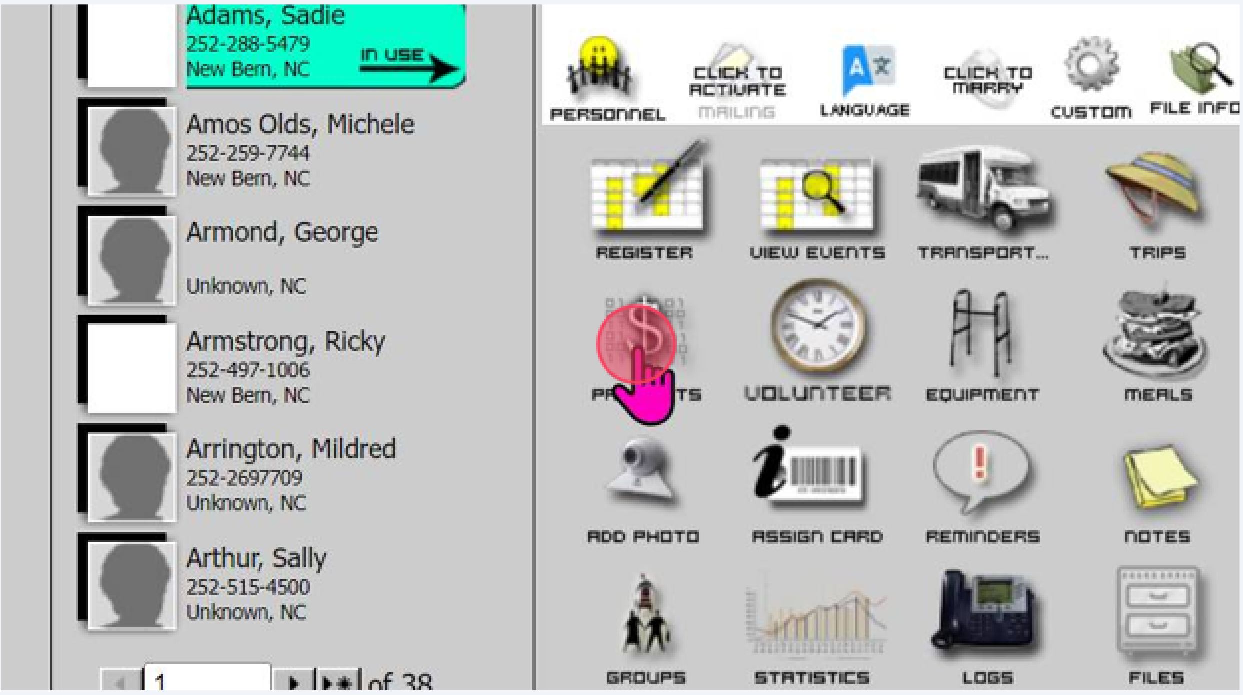
109 Select a payment plan.



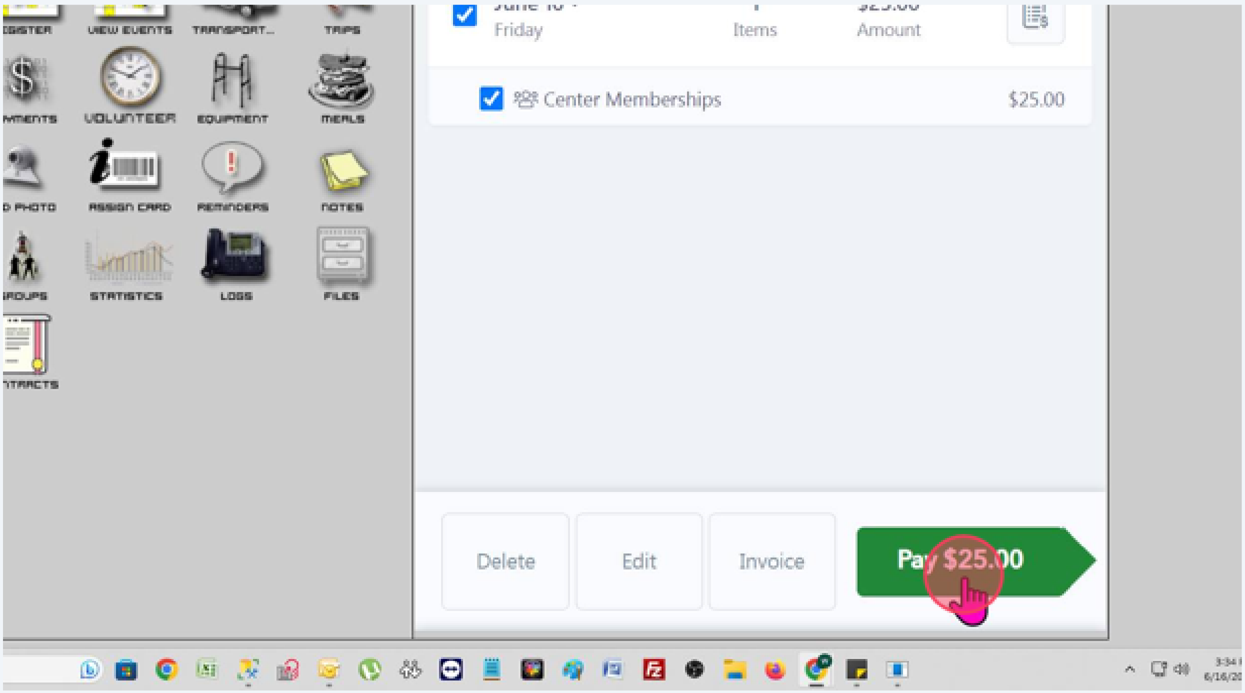
110 Here you will be asked if the Person paid but you may not be ready to settle that payment if you're signing them up for other things as well.
Click "No" here.



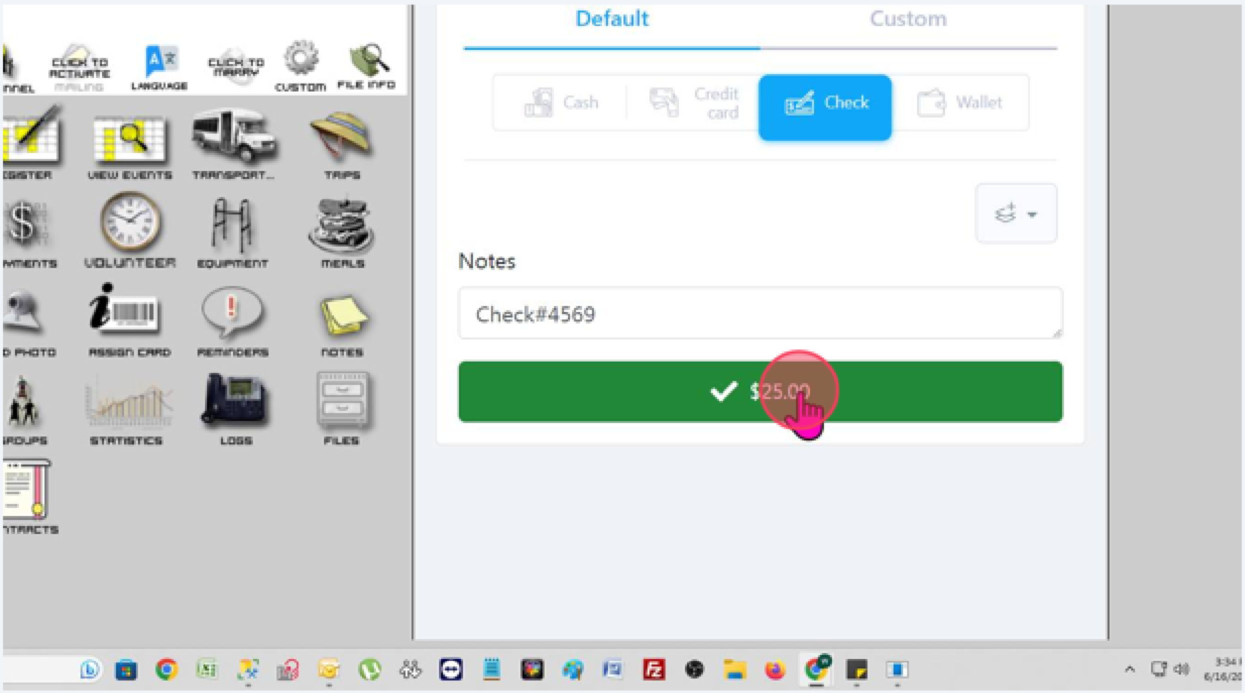
111 Once you are ready to settle the payment you can click on their payment icon.



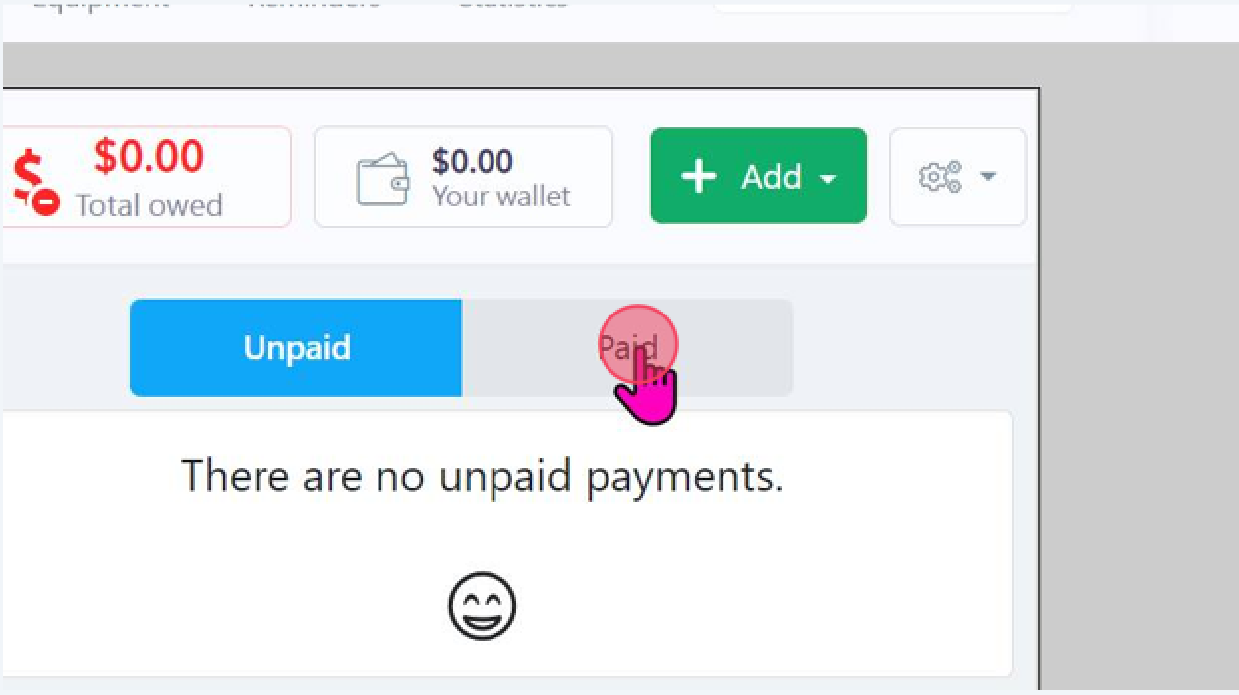
112 Here you will see their unpaid charge and can click pay at the bottom



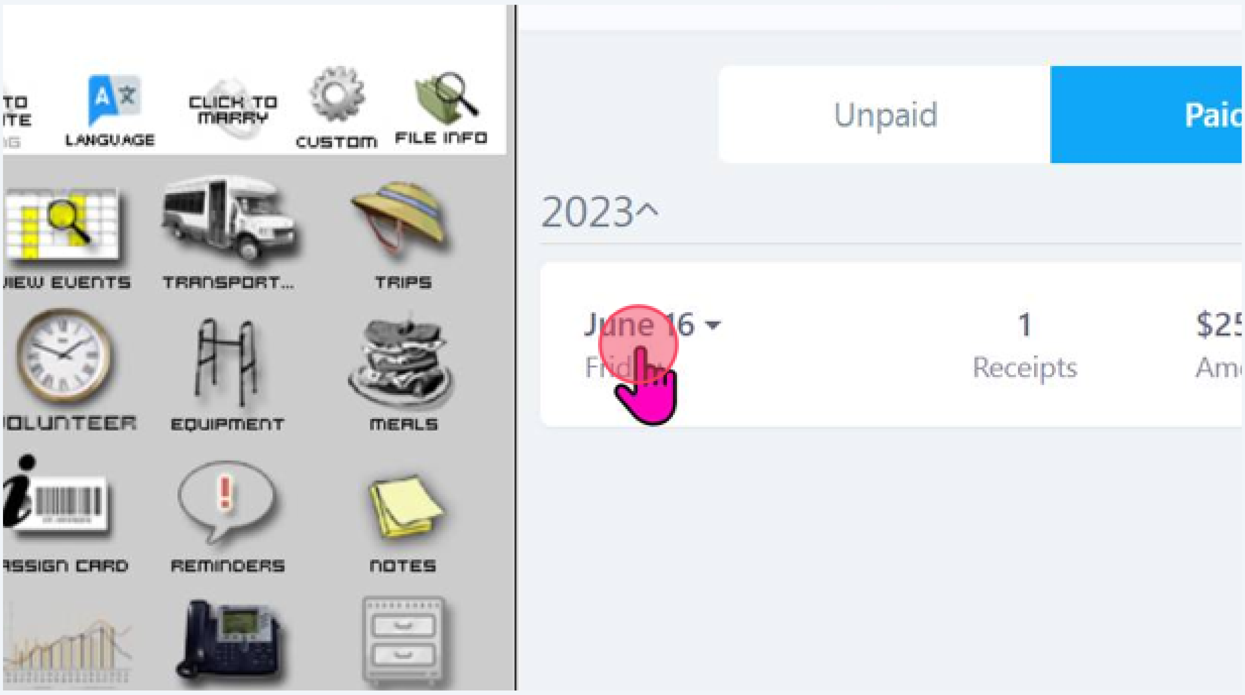
113 Now you'll choose a payment plan and enter any note you may need to. For example, check numbers can be typed in the notes field. Now click the big green button at the bottom



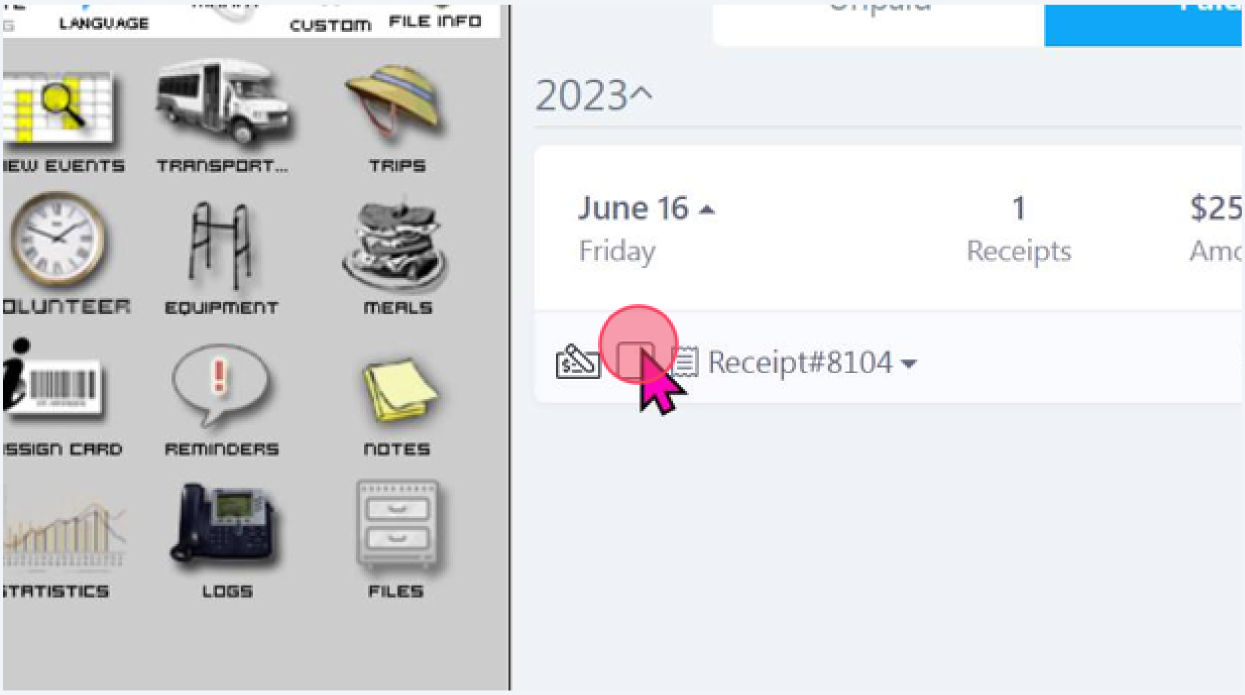
114 To print a receipt click the Paid tab.



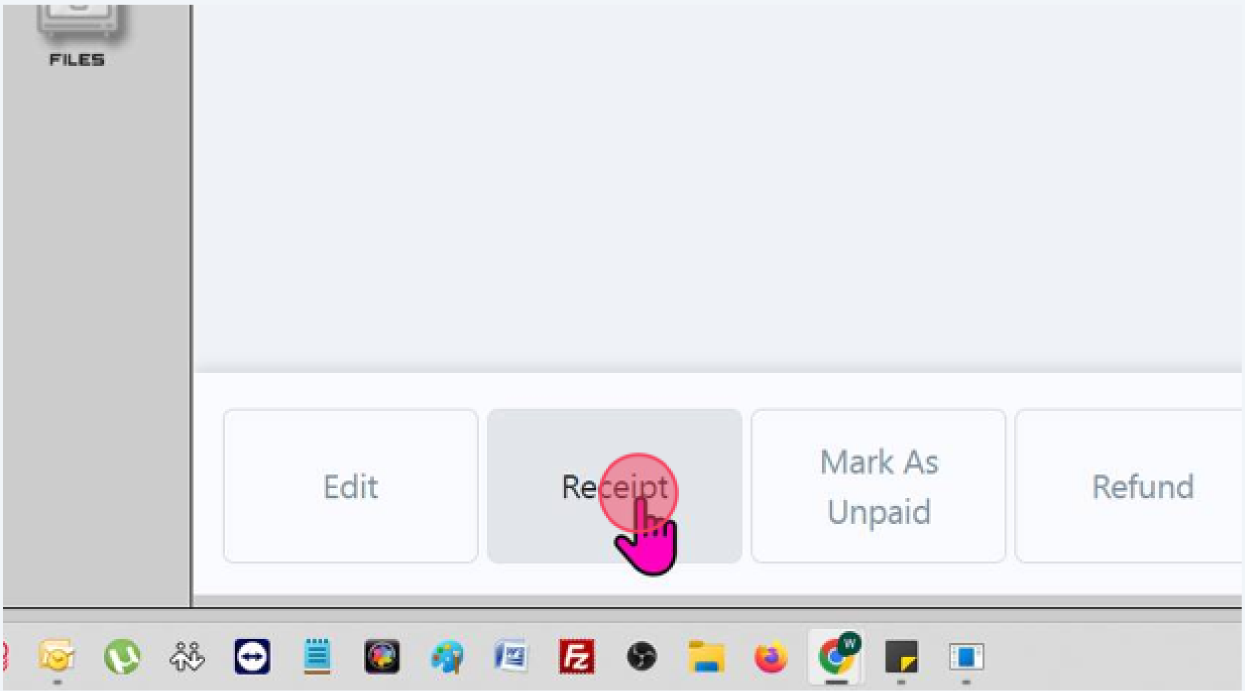
115 Choose a date.



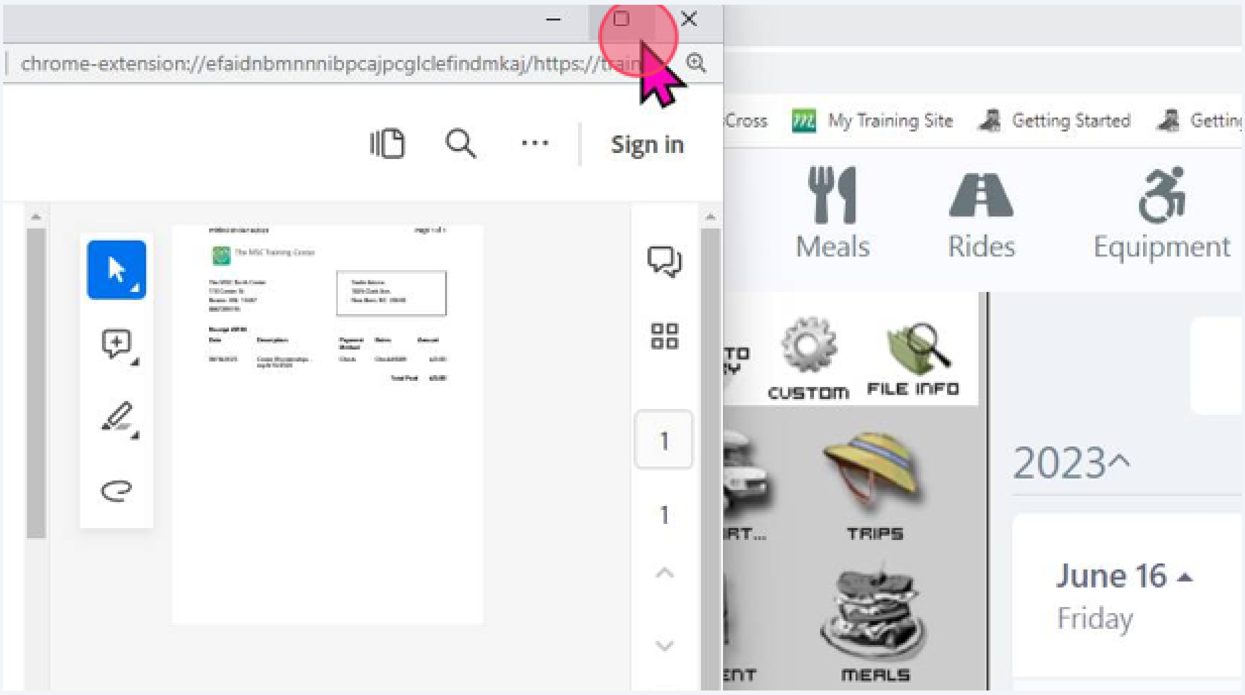
116 Choose a receipt



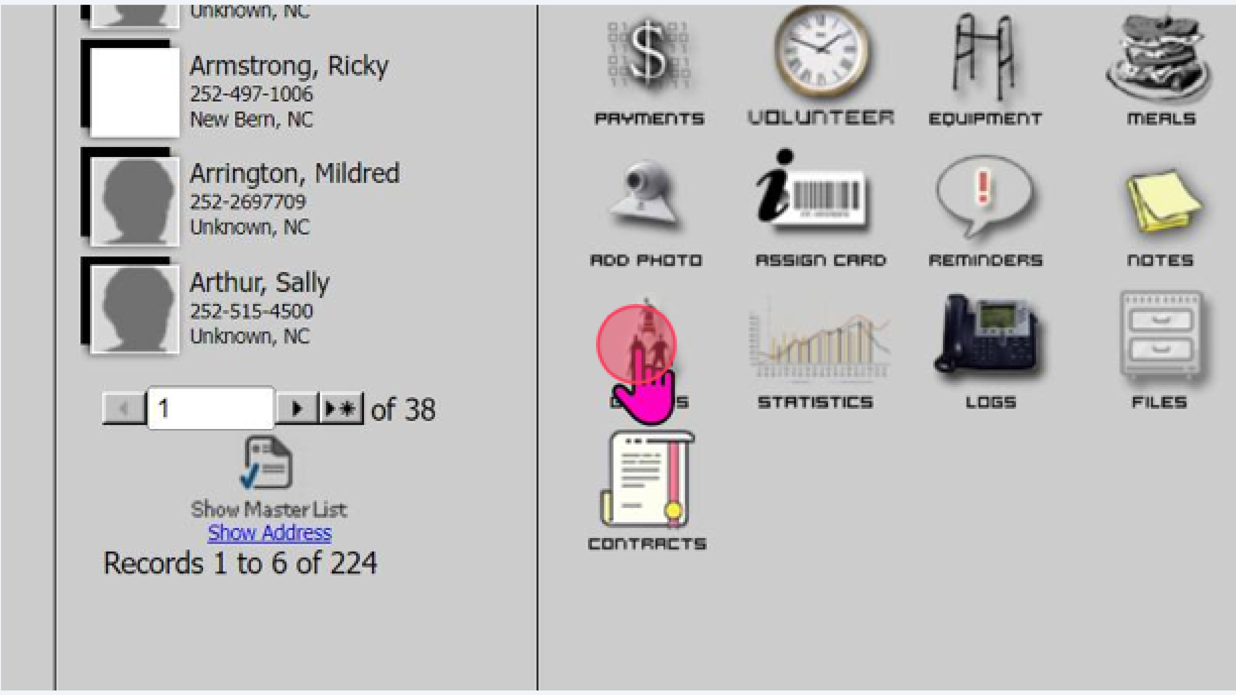
117 Click "Receipt" At the bottom



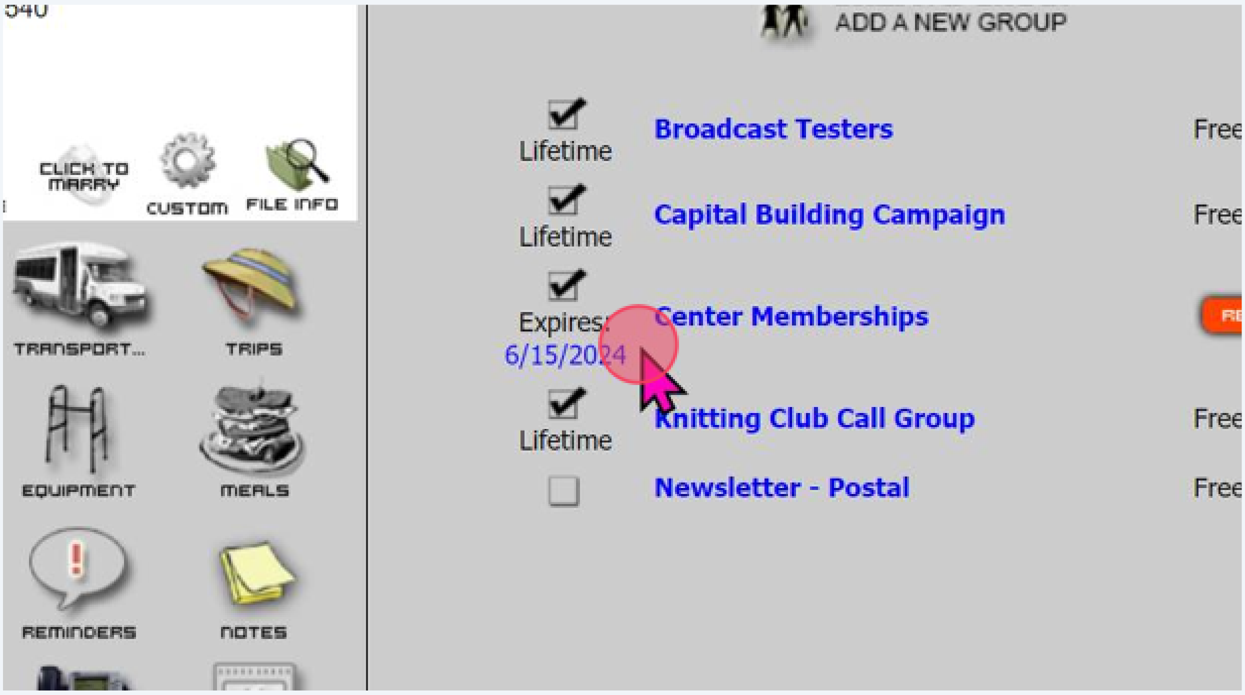
118 Receipts can either be printed or downloaded as a PDF.



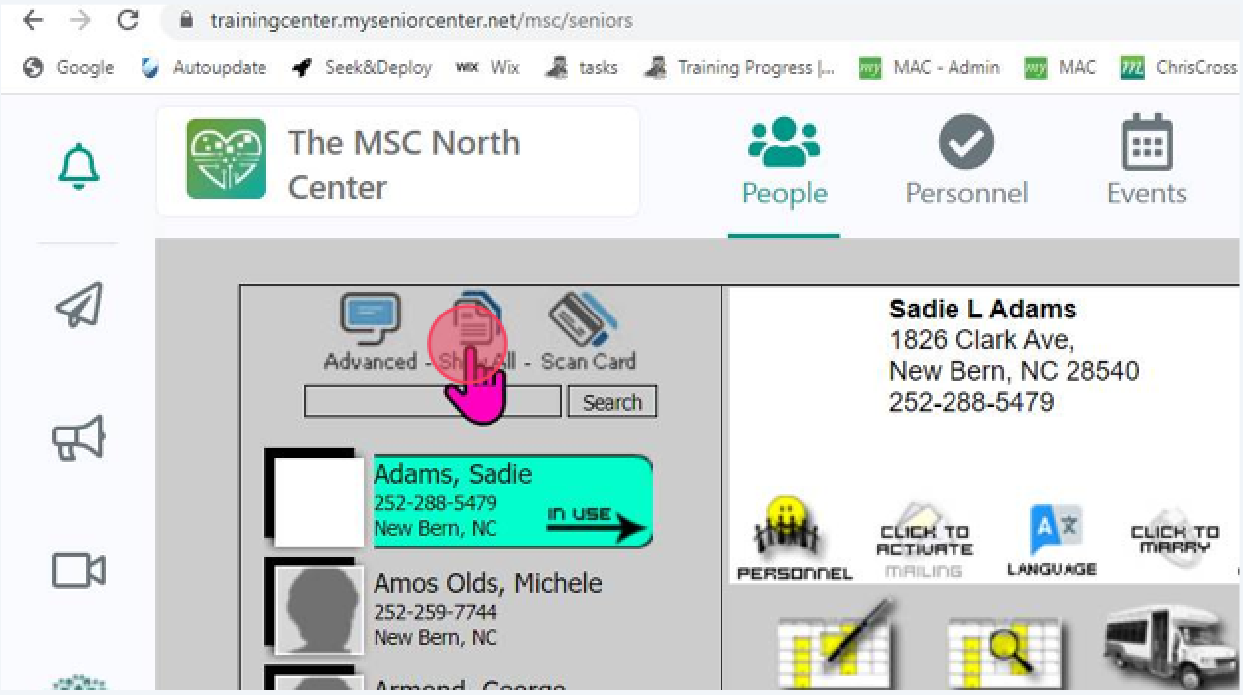
119 Click Back on their groups icon



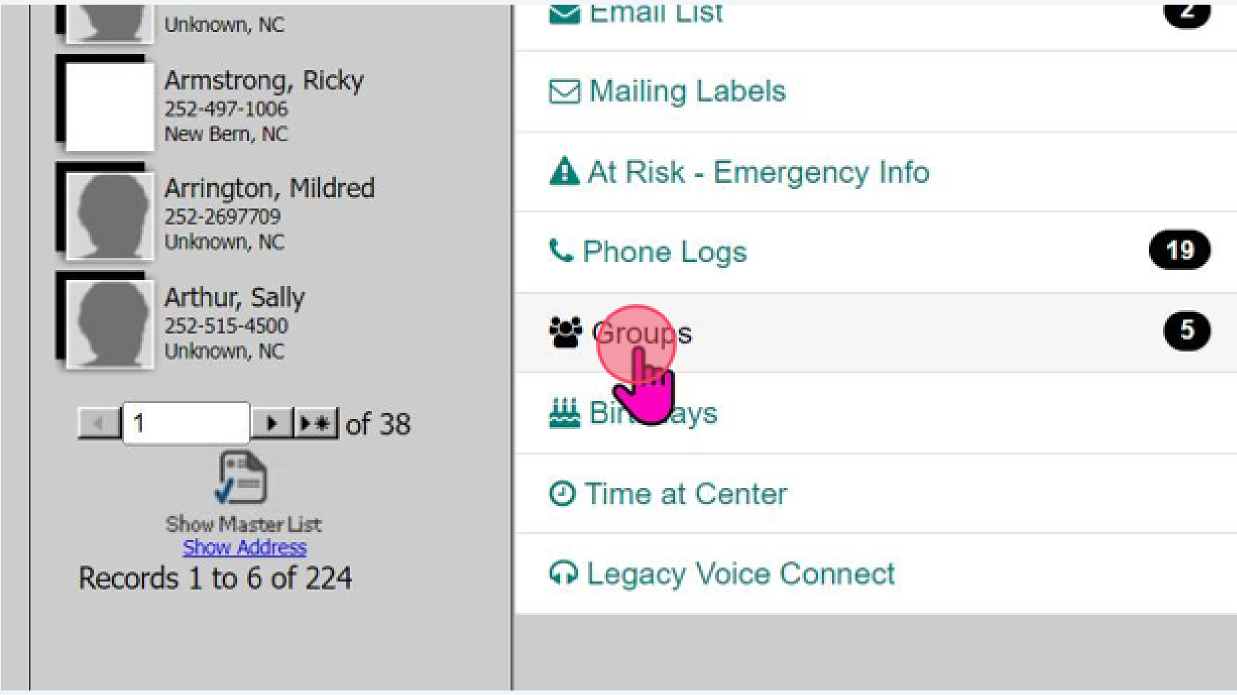
120 Here we can see there new expiration date and when they're ready to renew, instead of checking the box we simply click the renew button



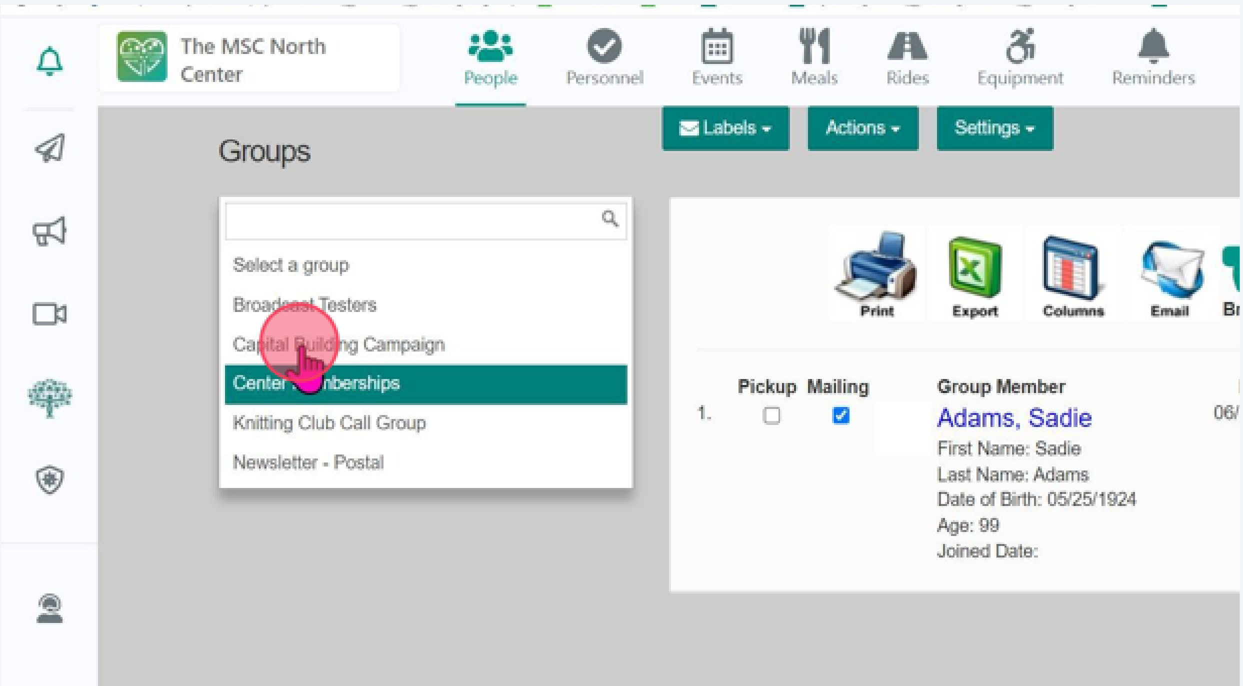
121 Click show all above the search box



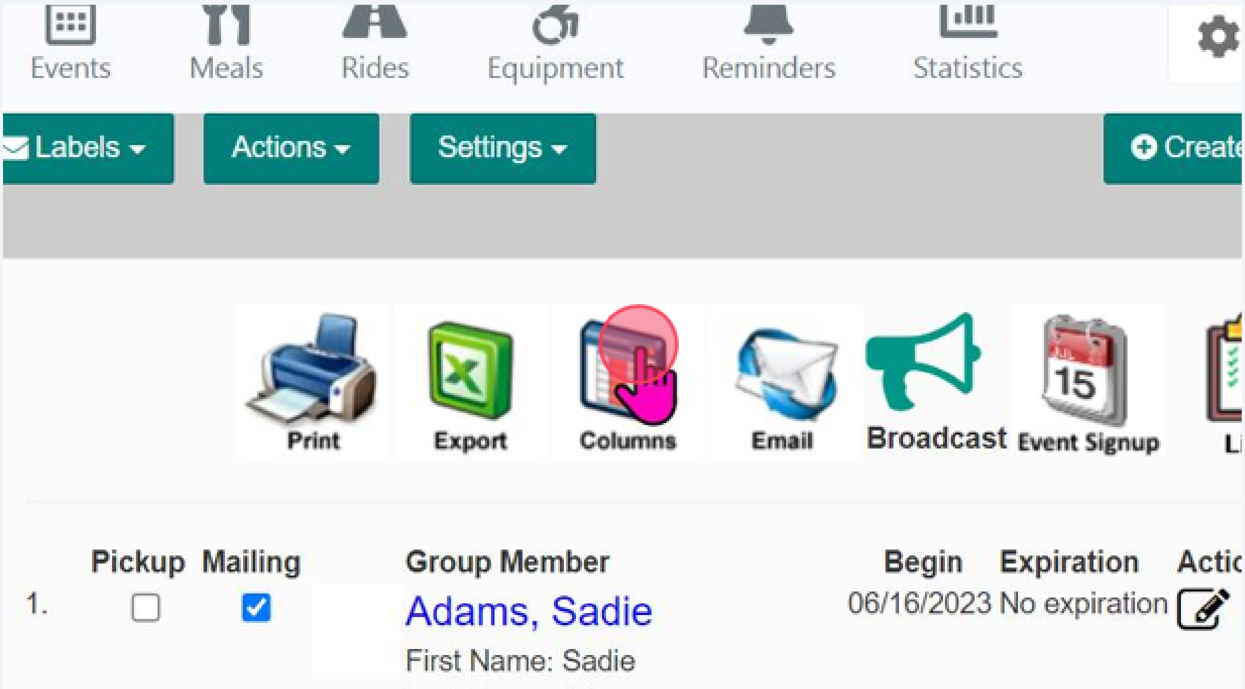
122 Click " Groups"



123 Here you'll see the opposite view. Before, we were looking at a list of people and the groups they belong to. Now we're looking at the groups and the people that belong to them. This is where we can perform a bunch of different actions Like printing or exporting to excel.

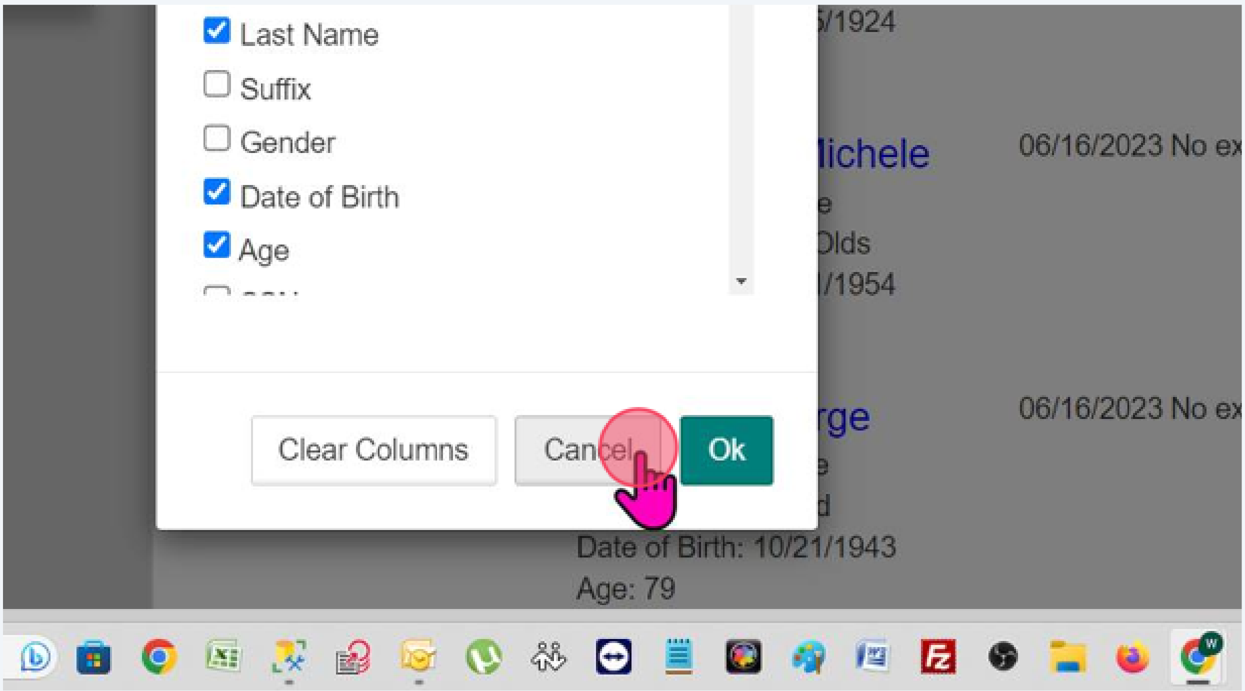


124 You can customize your excel export by clicking on columns icon.

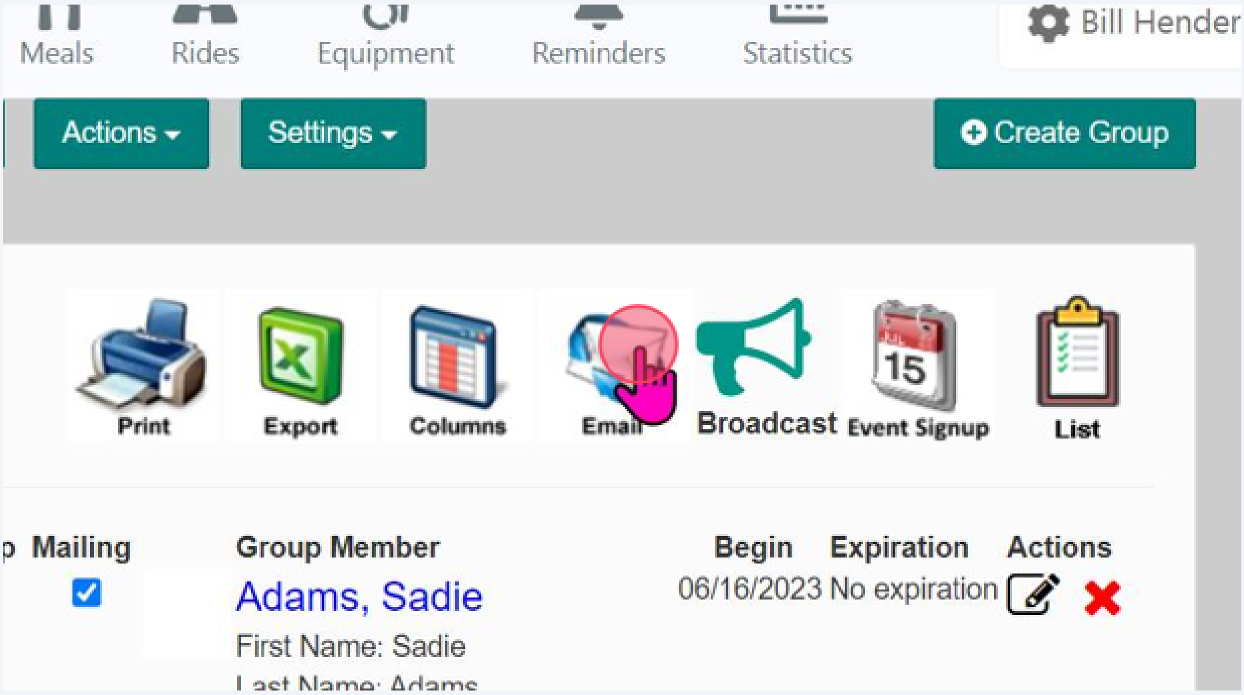


125 Here you can choose from their file info fields and custom fields and completely customize your exported excel sheet.

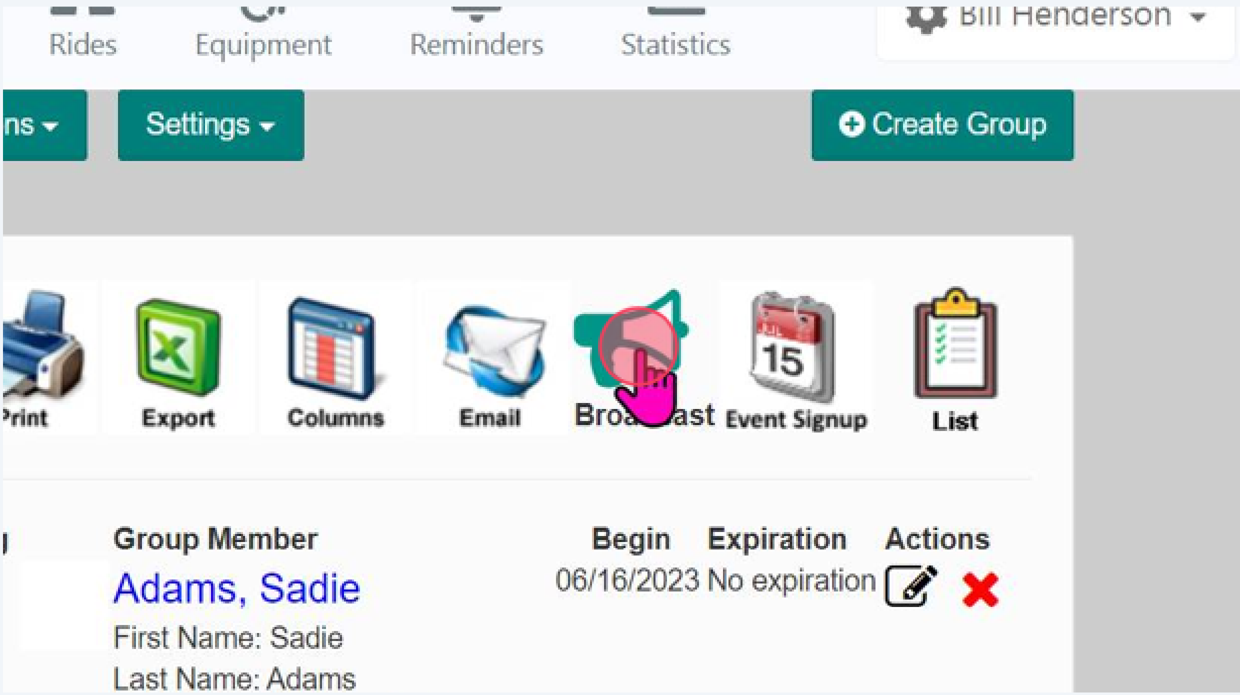
Click "Cancel"



126 If you prefer to send emails using a 3rd party program like male chimp, simply click on the email button to get a list of email addresses that you can copy and paste into that third party program.

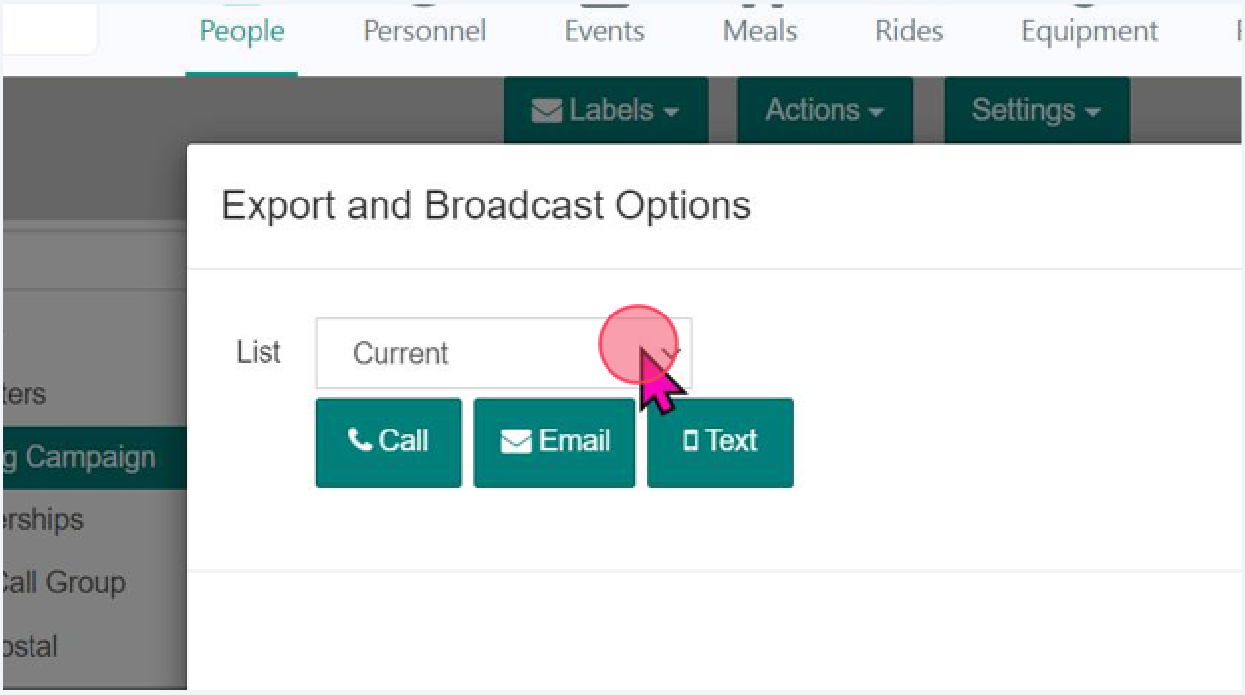


127 Click the broadcast button

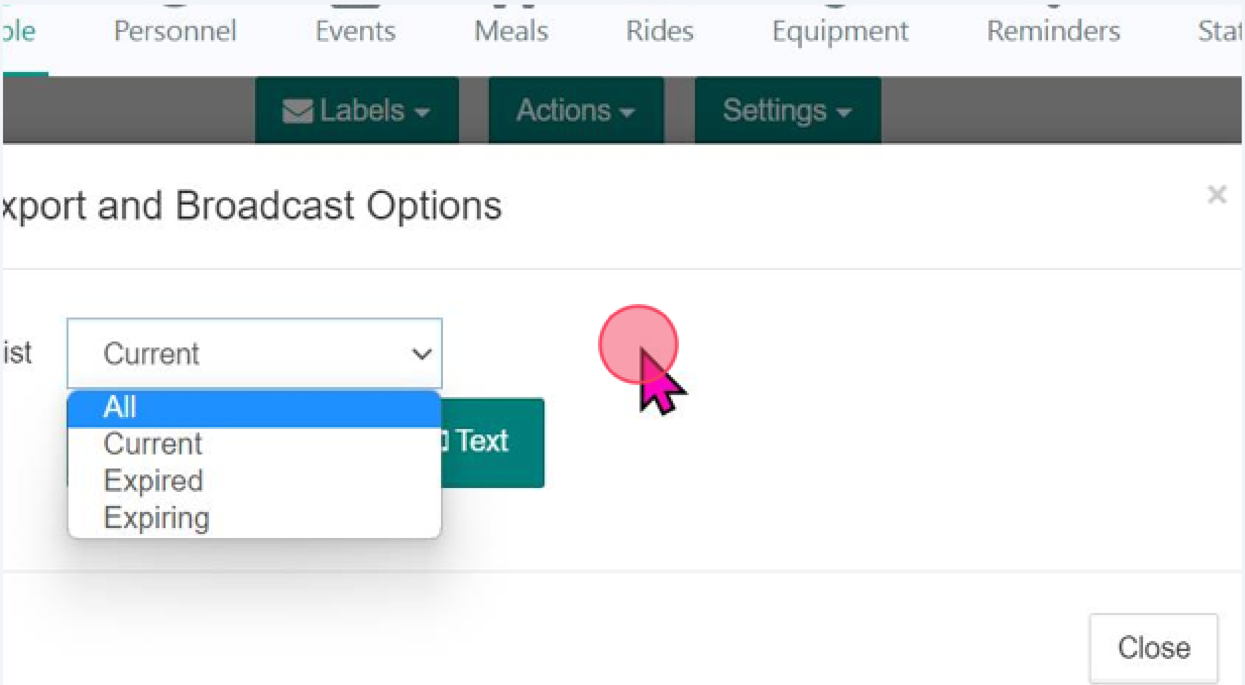


128 From here you can send a call, email, or text to everyone in the group.

Click the drop down list.

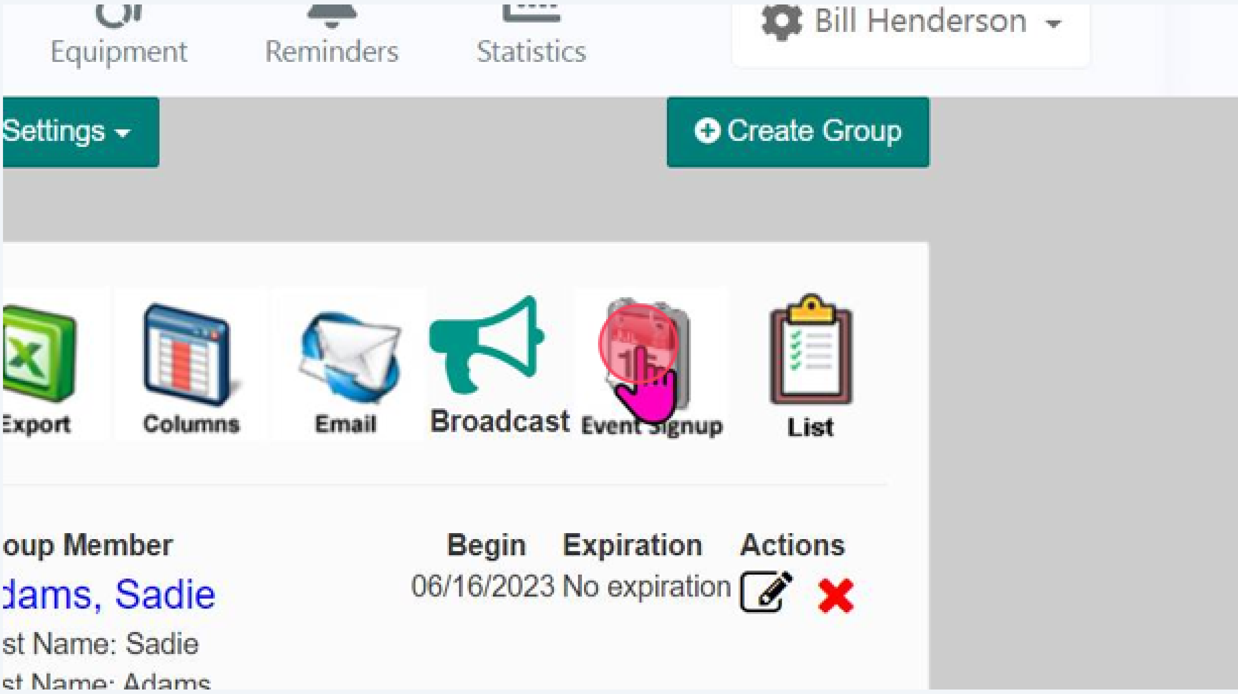


129 For your membership group you'll be able to decide if you want to send the broadcasts out to everyone, just people that are current on their membership, just people that have expired or people that are going to be expiring within a future date range.

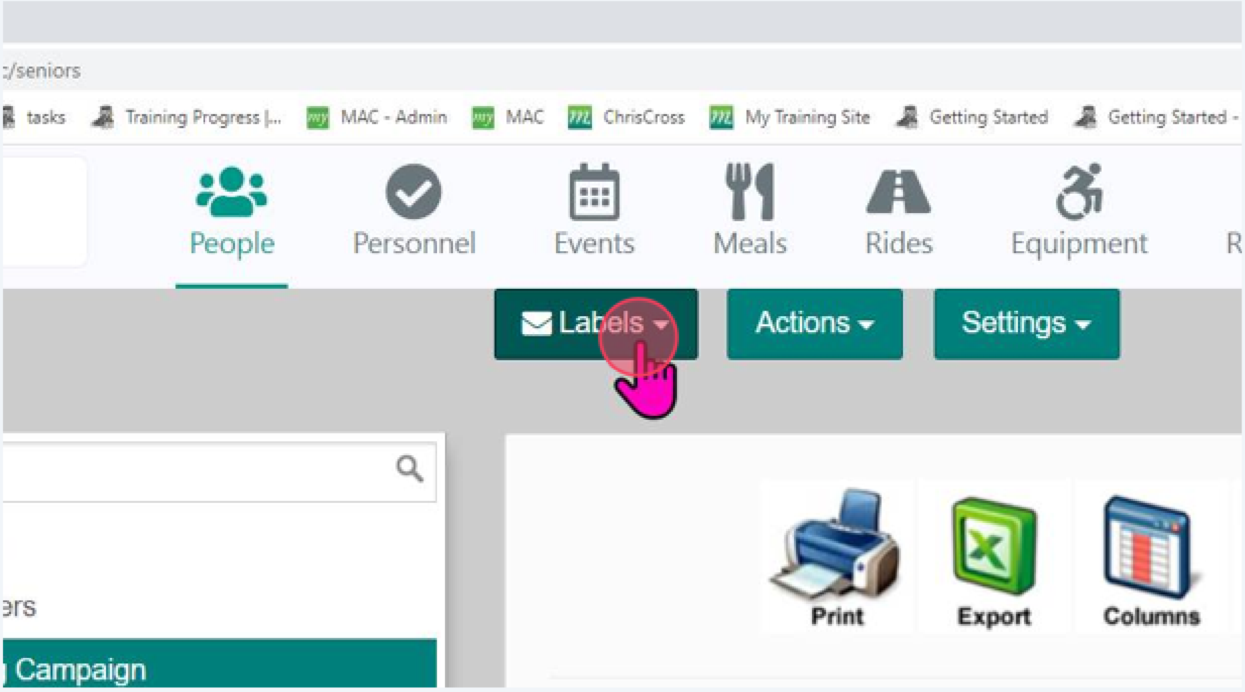


130 Click "Close"

131 Clicking event signup will bring to your list of events so you can register the people in this group for events as a group instead of individuals. It's a shortcut for adding groups of people to rosters.

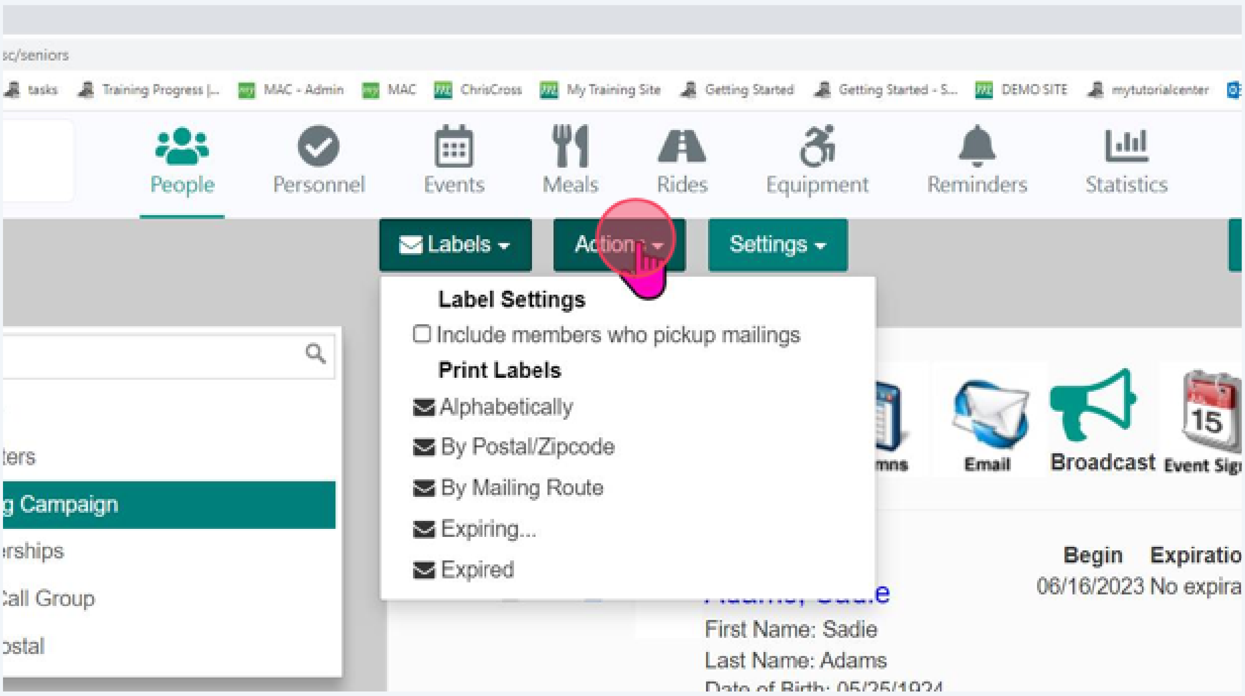


132 Click " Labels "

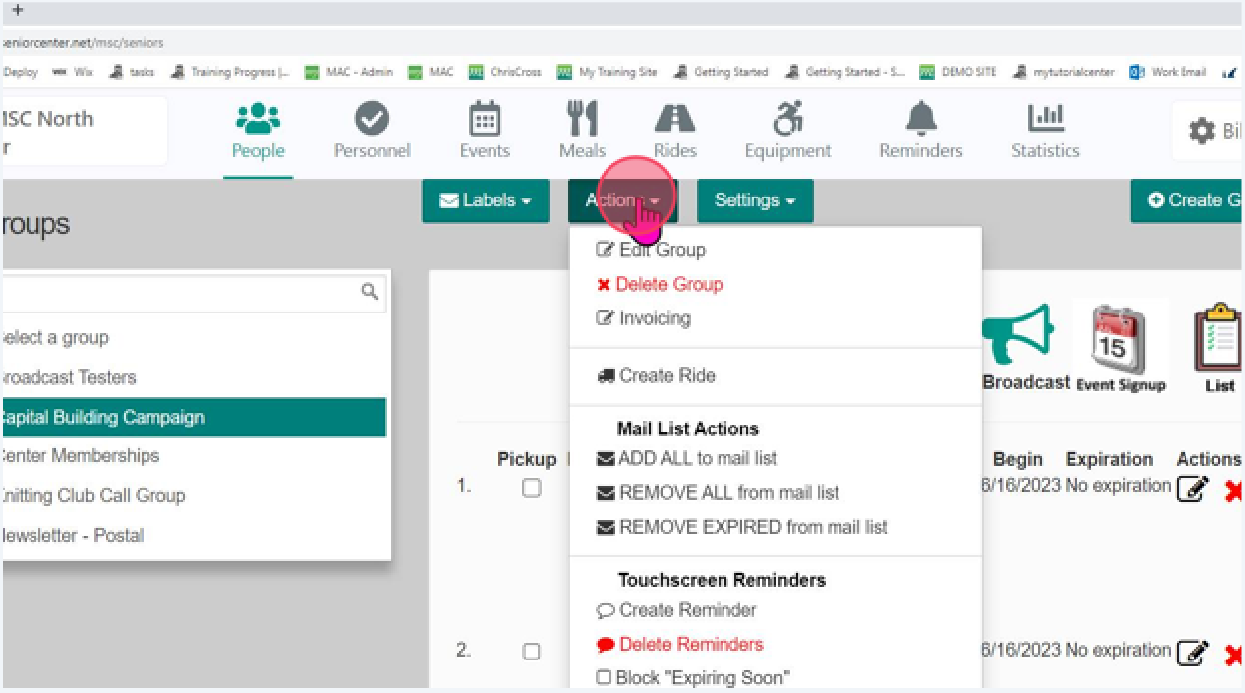


133 Here you have various choices for printing out mailing labels including the same choices you have with broadcasts.

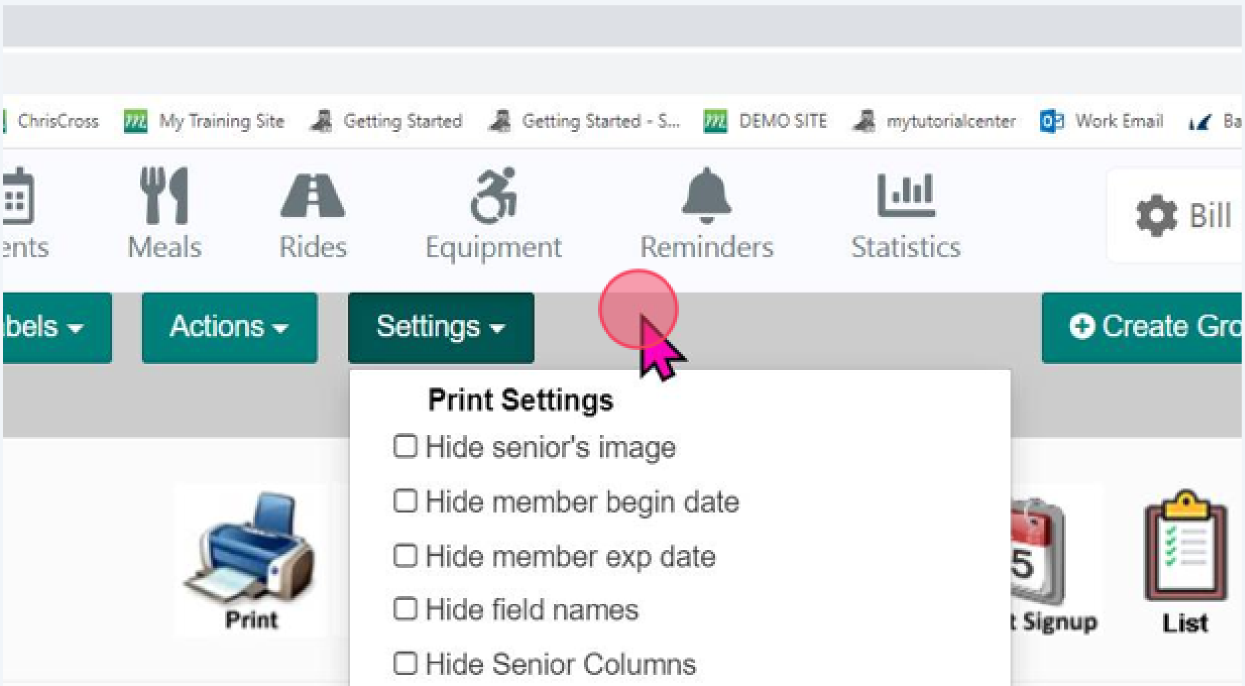
Click the actions drop down



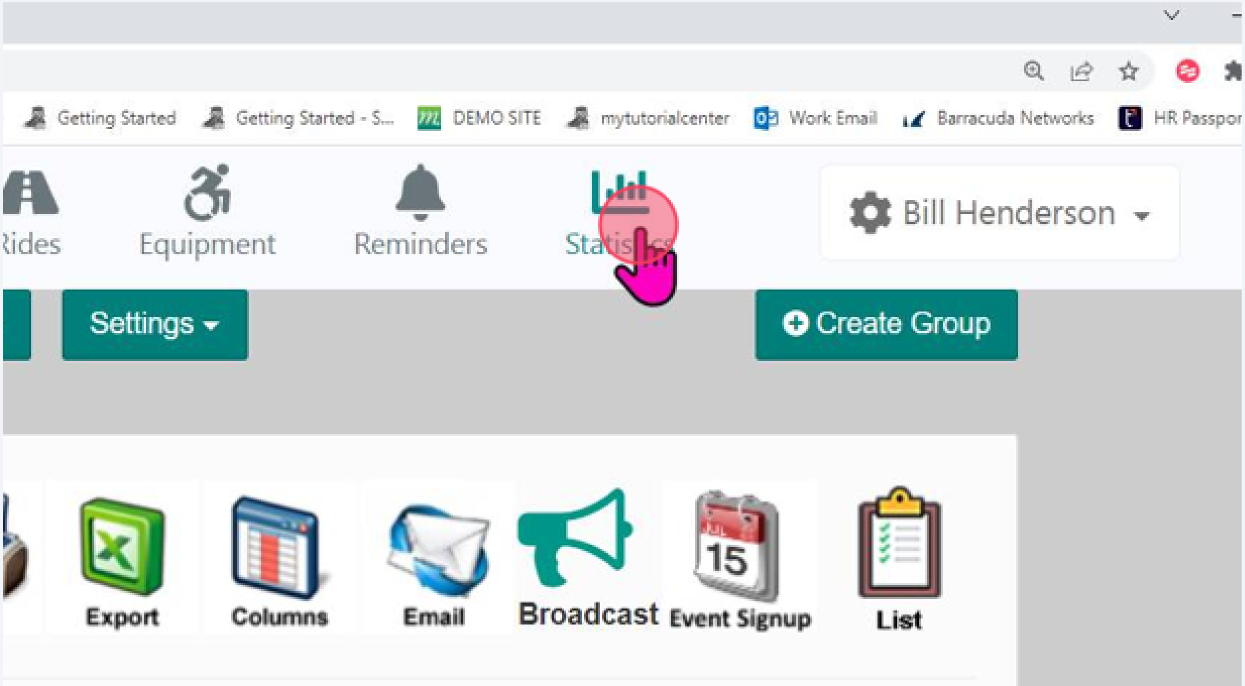
134 Here you can edit the group, delete the group, create invoices for the group as a group and create a ride for everybody all together as a group. You have some different mailing list actions and you can create a touch screen reminder that will pop up on the touchscreen the next time anybody in this group checks in.



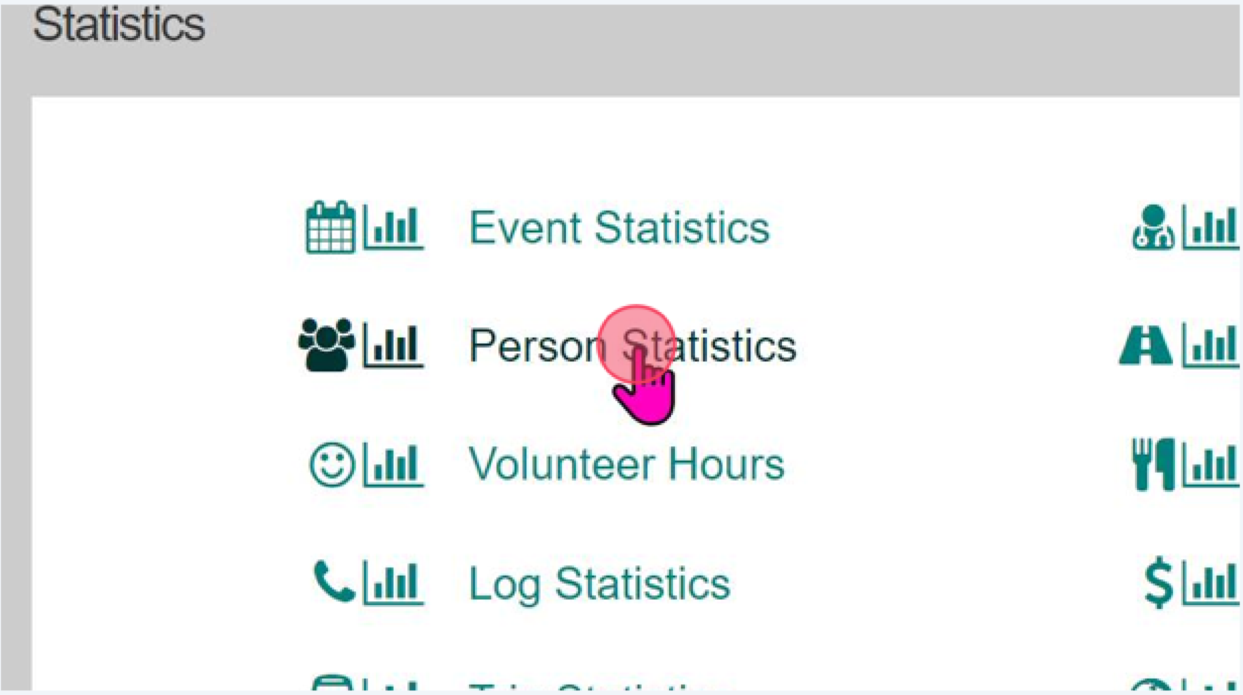
135 Under settings you'll find some different print options as well.



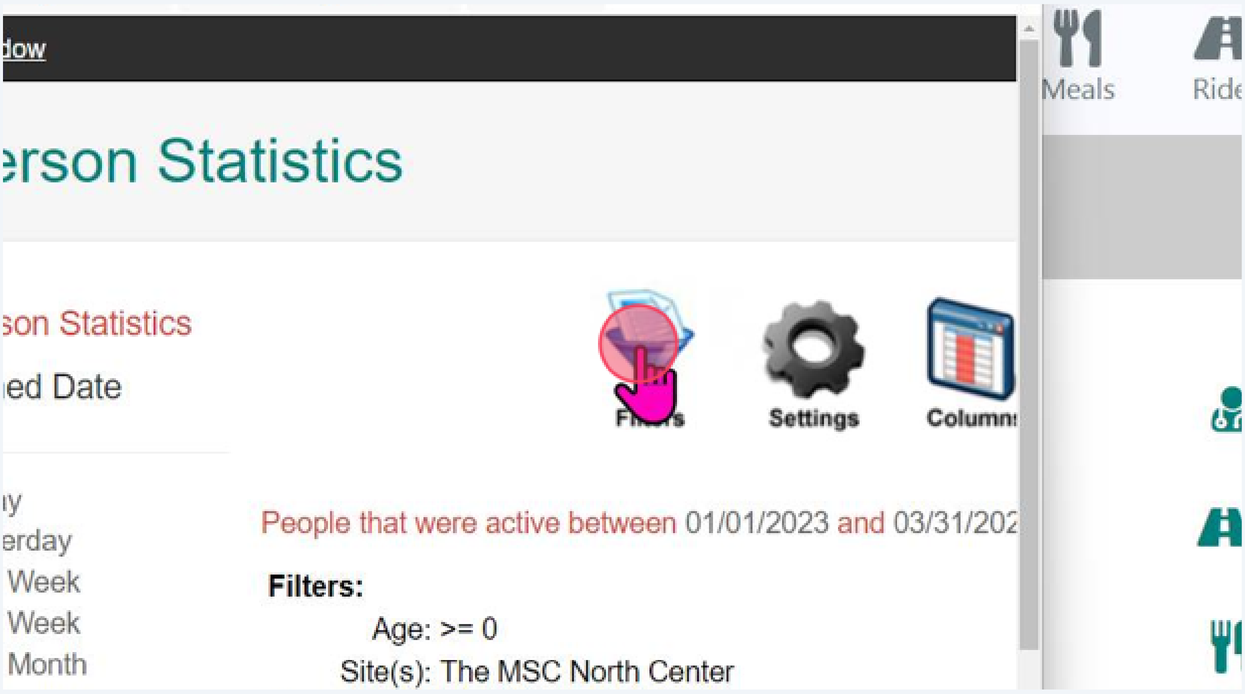
136 Click the statistics tab



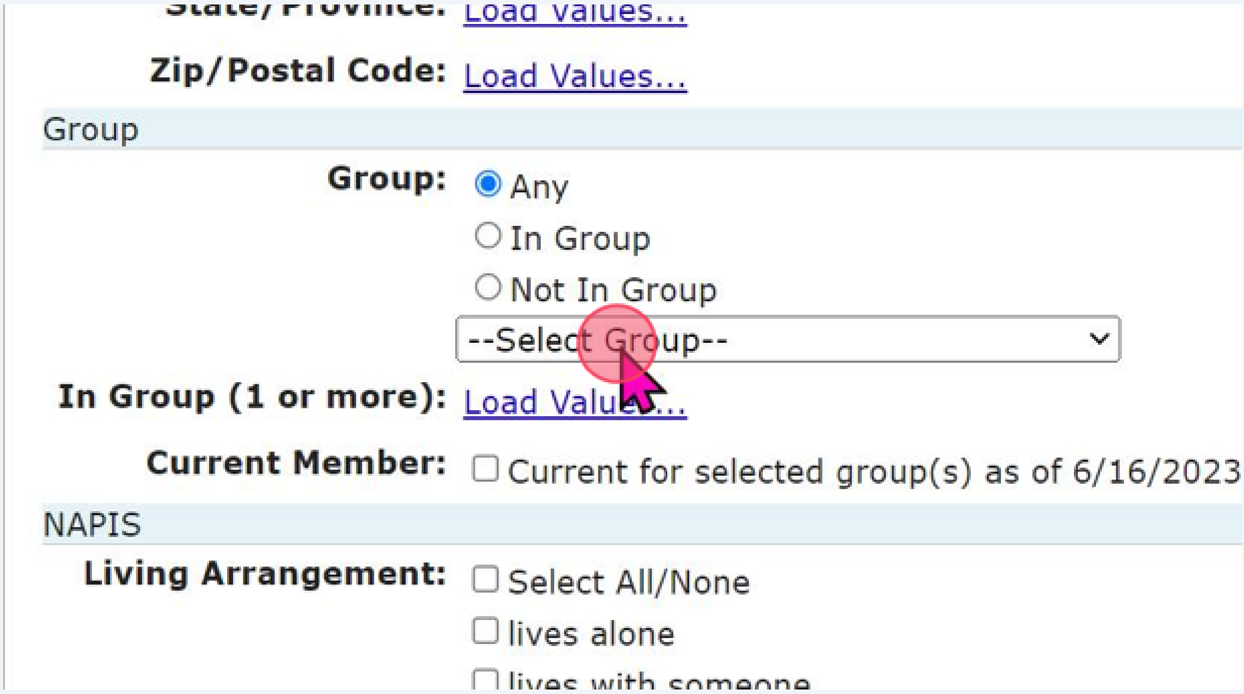
137 Click "Person Statistics"



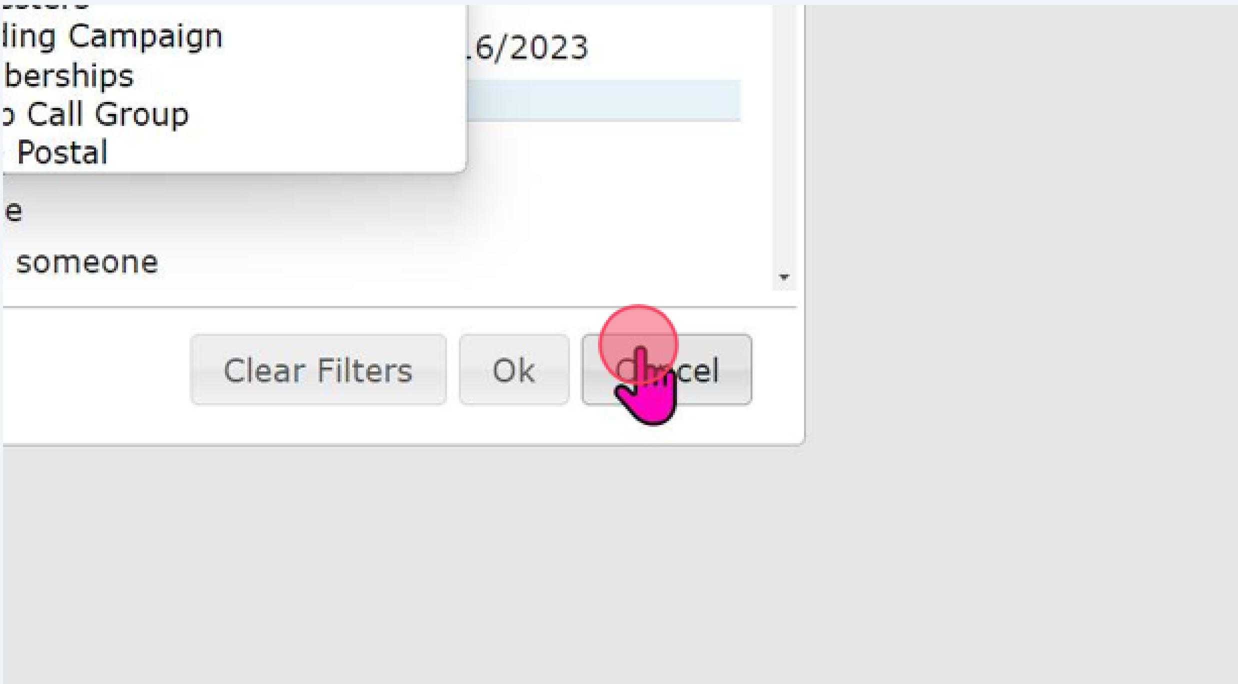
138 Click "Filters"



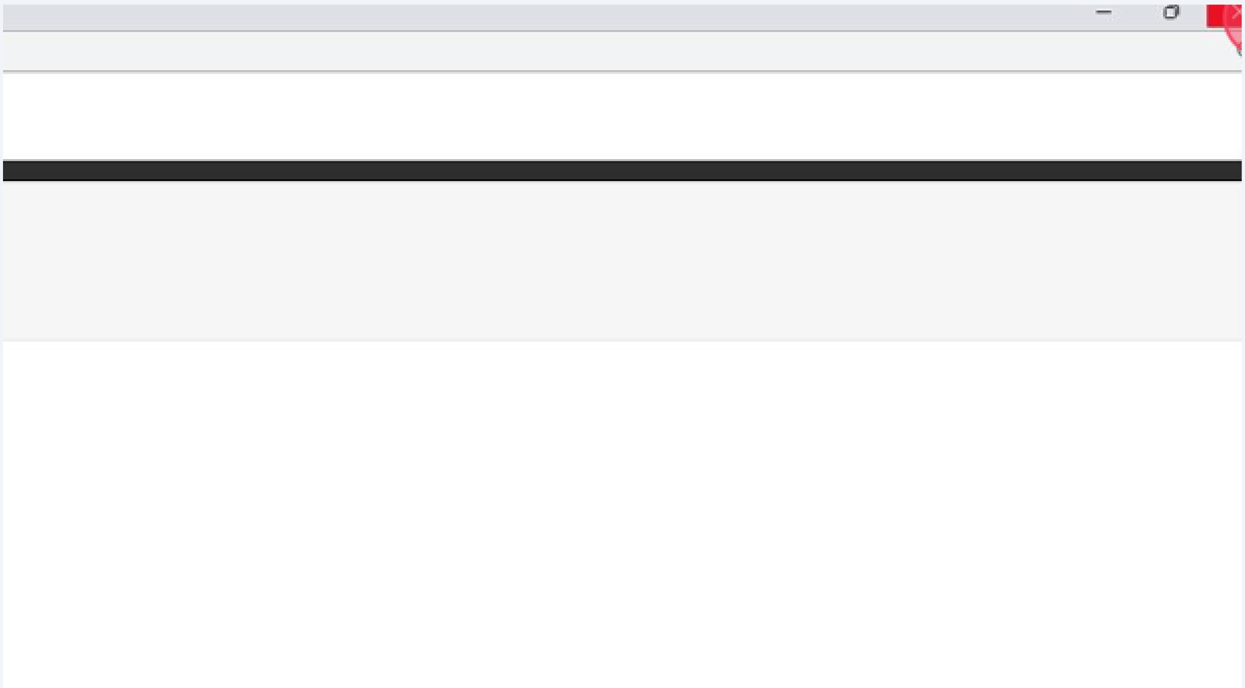
139 If you scroll through the filters you'll find the group's section where you can choose to get results on people that are in a certain group, not in a certain group or in one or more groups. You could also choose to only get current members for that group meaning if you have chosen a membership group, their membership is current. These filters show up in all of the statistics.



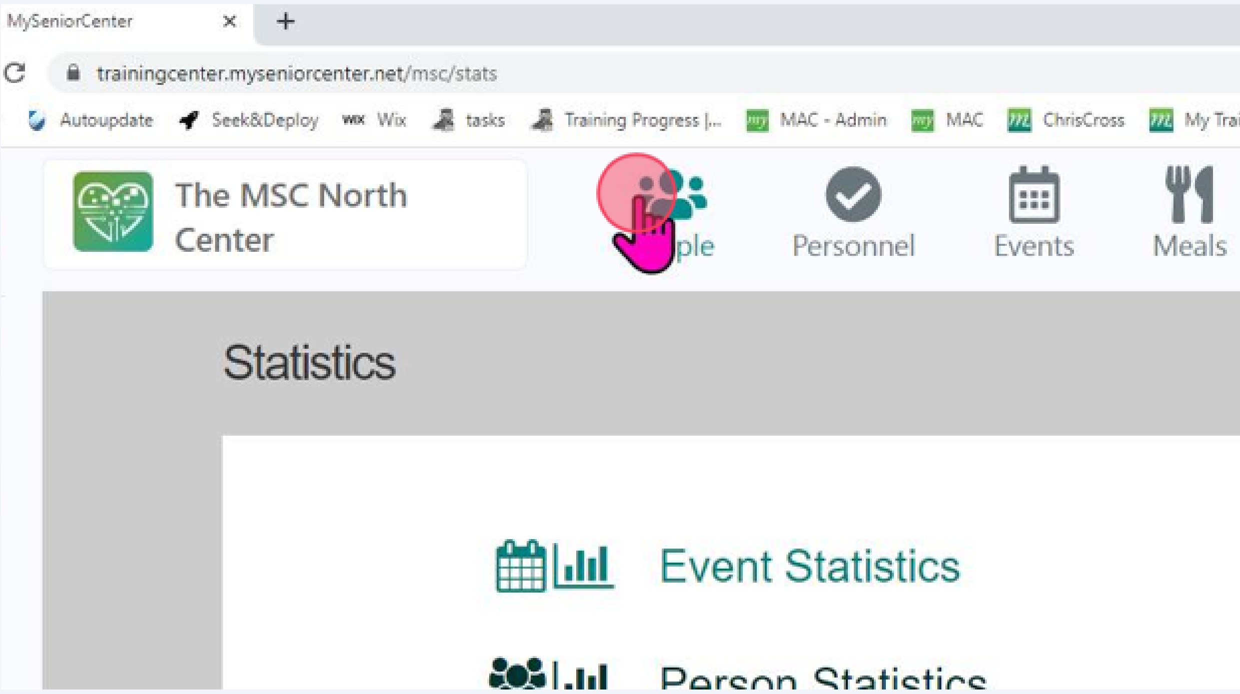
140 Click "Cancel"



141 Close the window

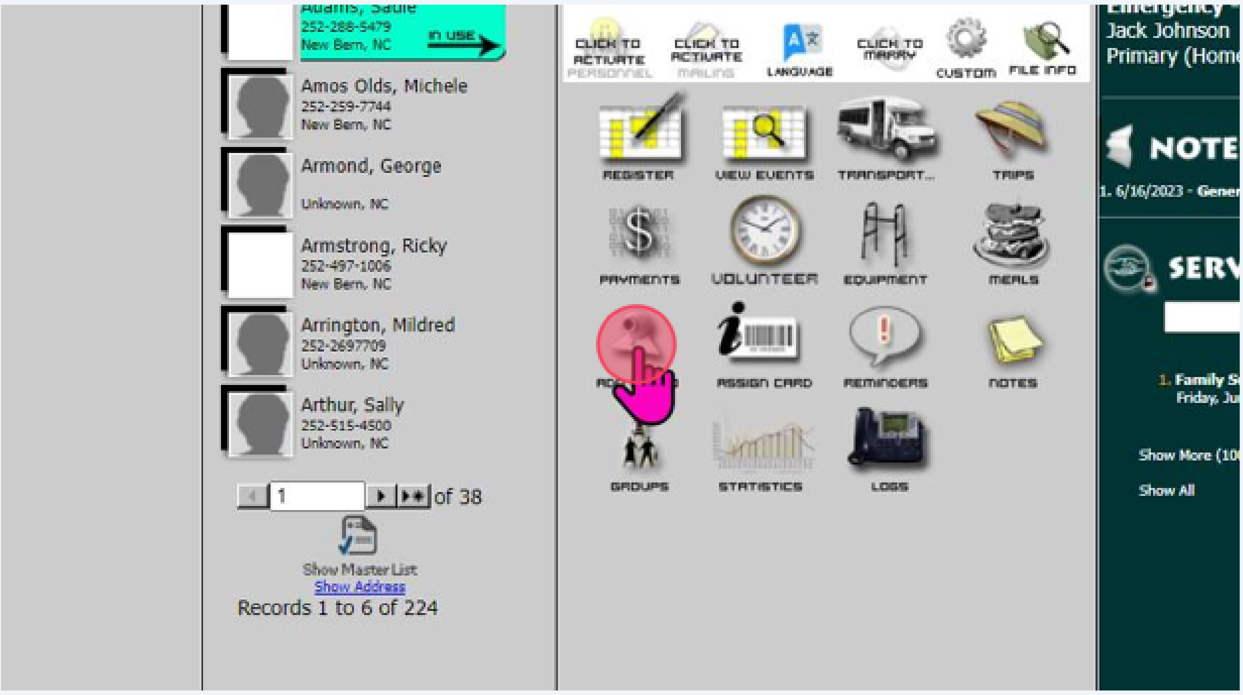


142 Go back to the people tab.

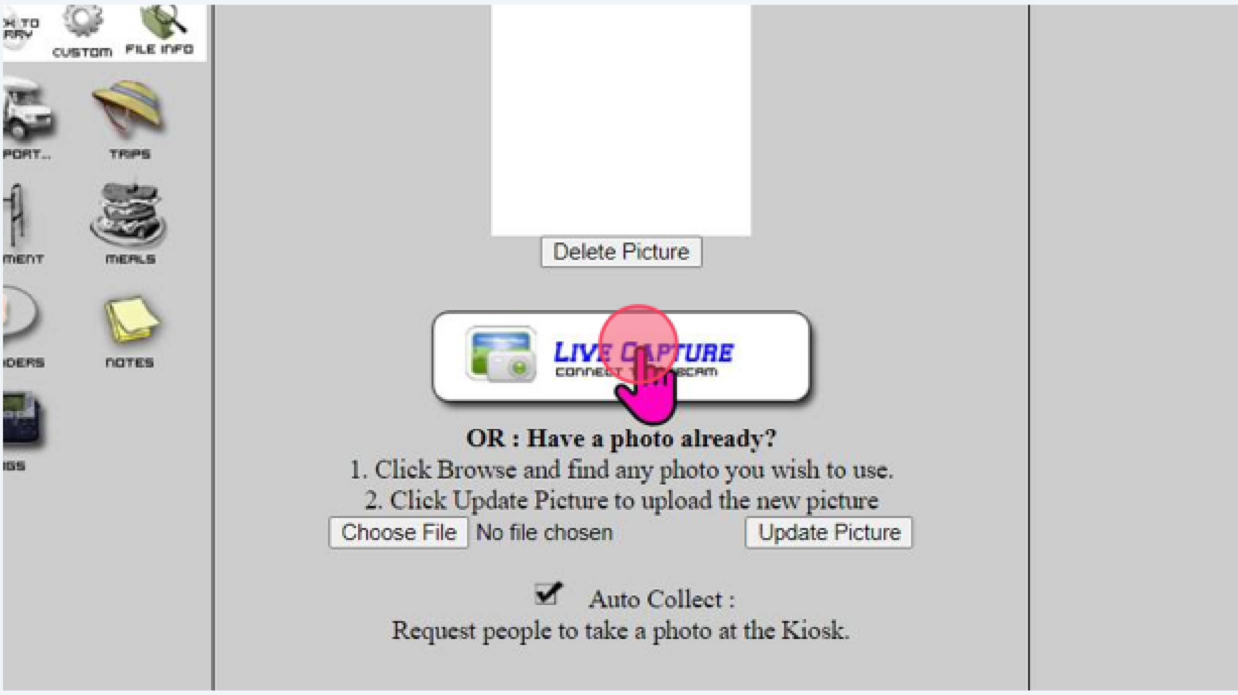


The Add Photo Icon

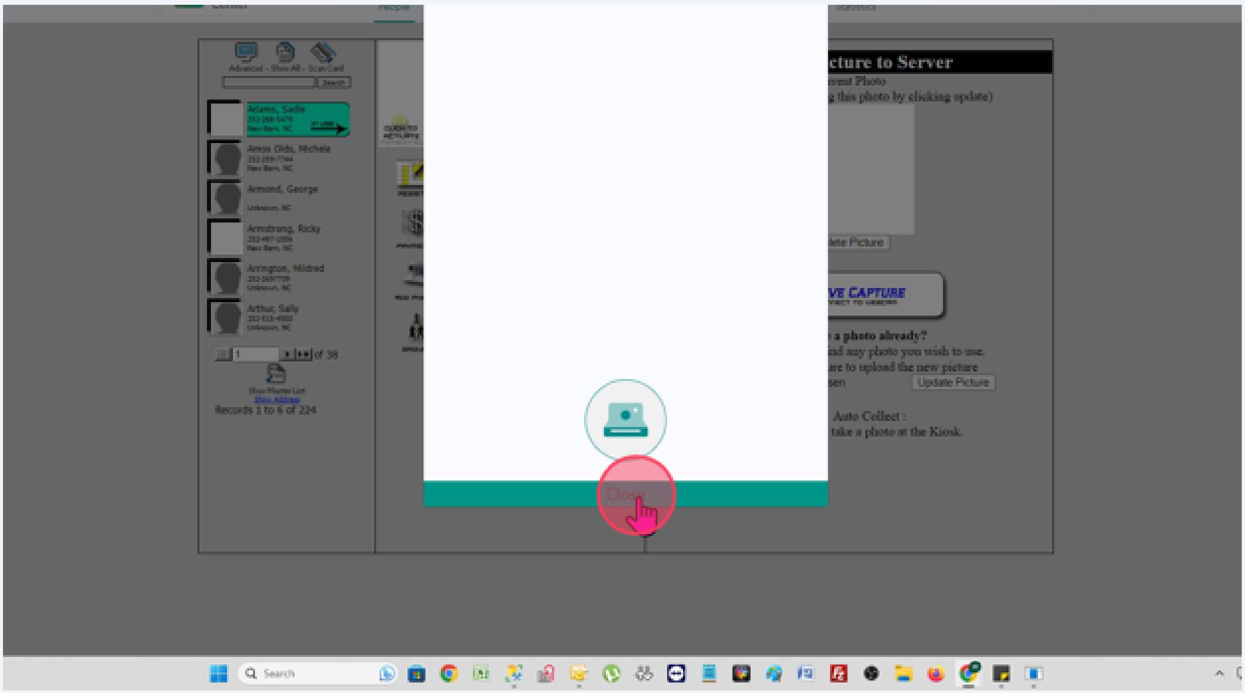
143 Click Add photo



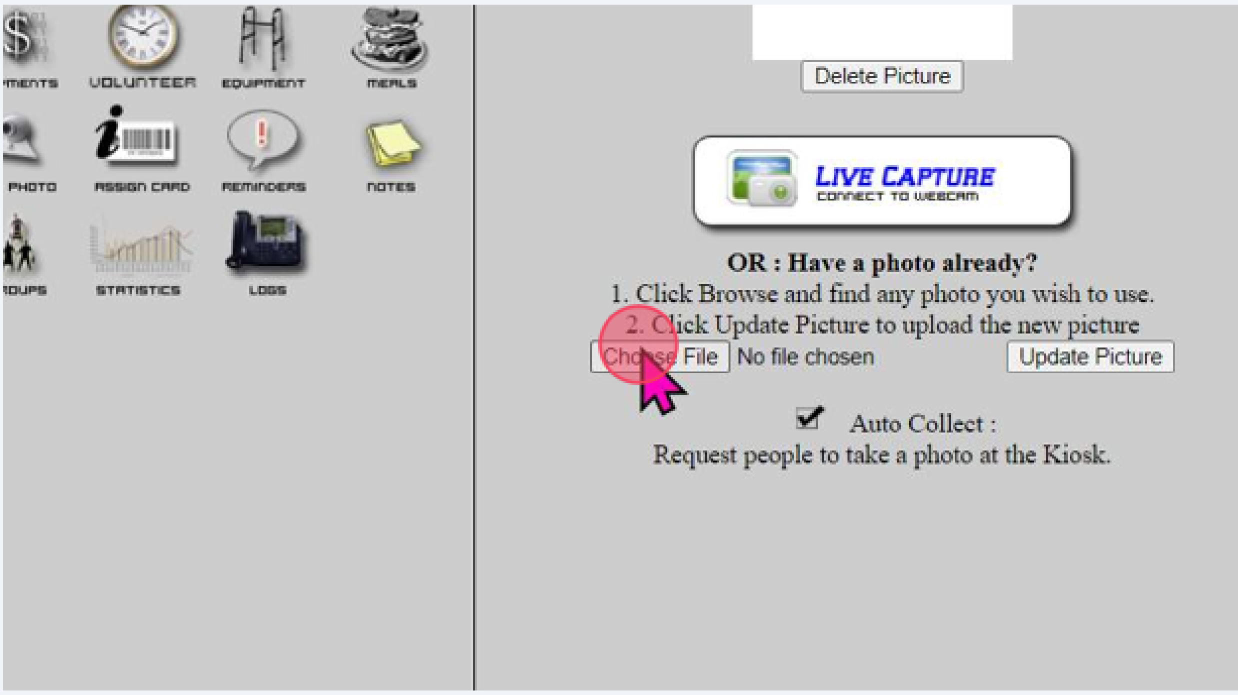
144 Here you can click live capture to take a photo of the person as long as you have a web cam connected to the computer that you are currently using. When you click Live Capture you'll get a pop up window and your computer should ask for permission to use your camera. Make sure to say yes.



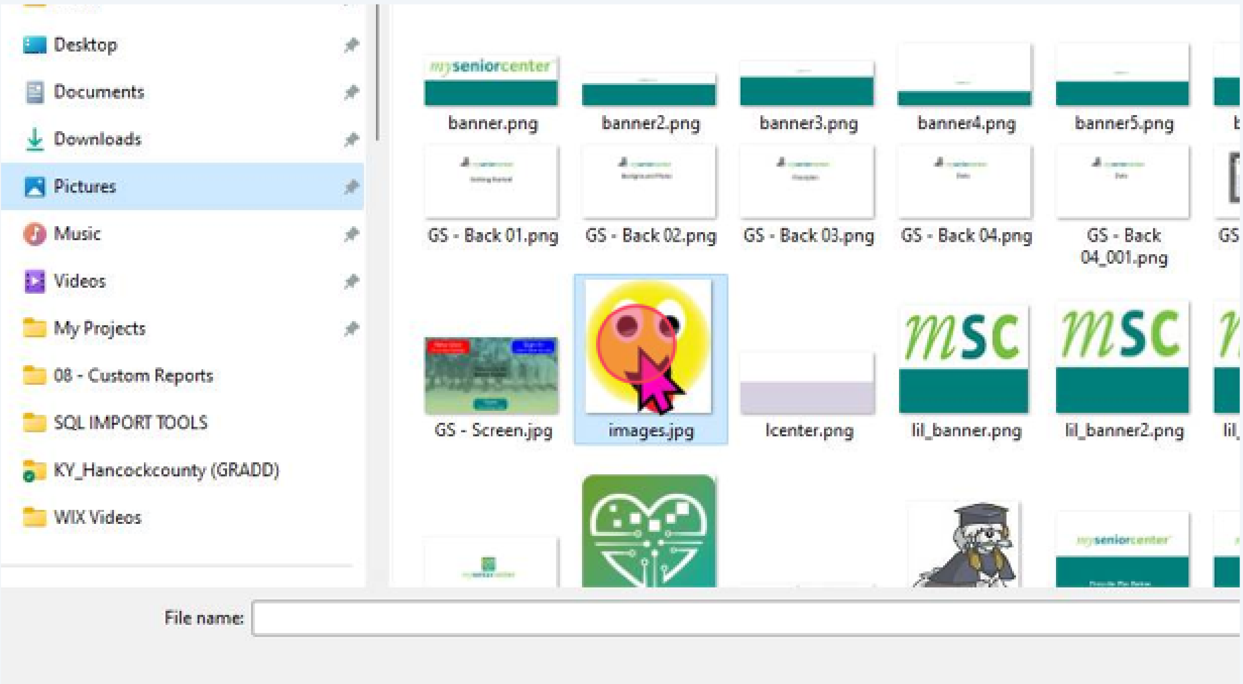
145 Now you'll see the person's face on the screen and you can click the green camera icon to take their picture.



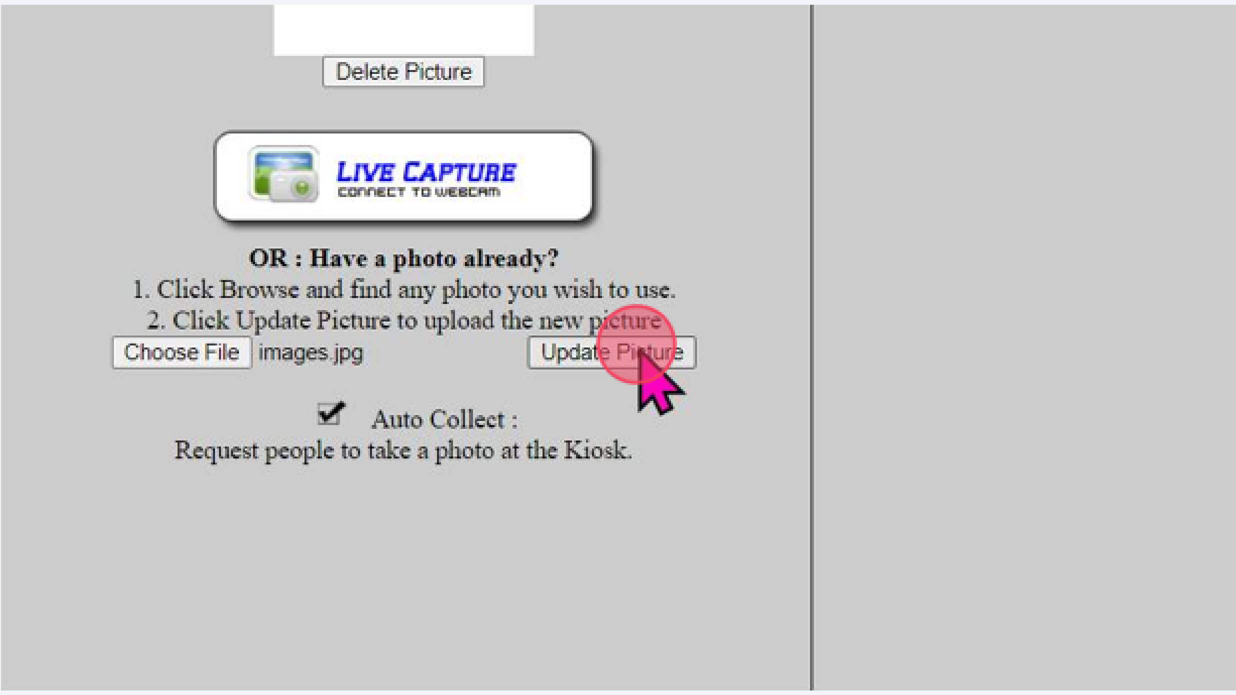
146 Alternatively you can click "Choose File" to upload a photo from Your computer. Click choose file.



147 Choose a picture.



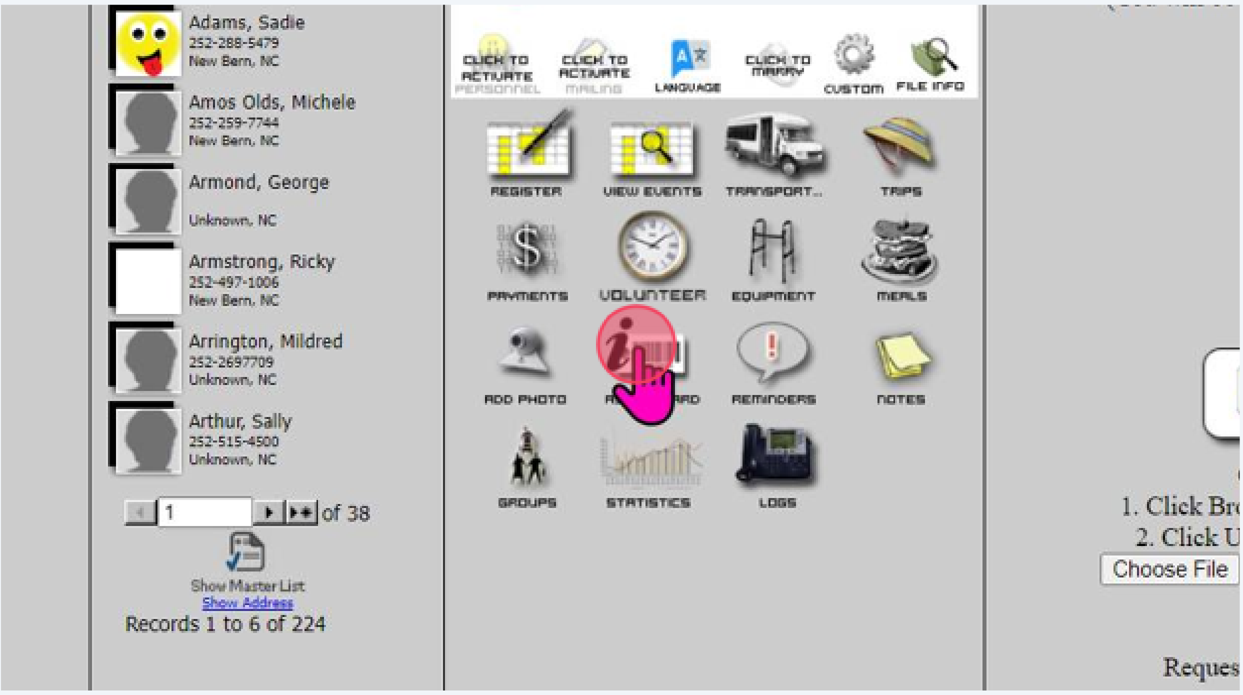
148 Click "Update Picture"



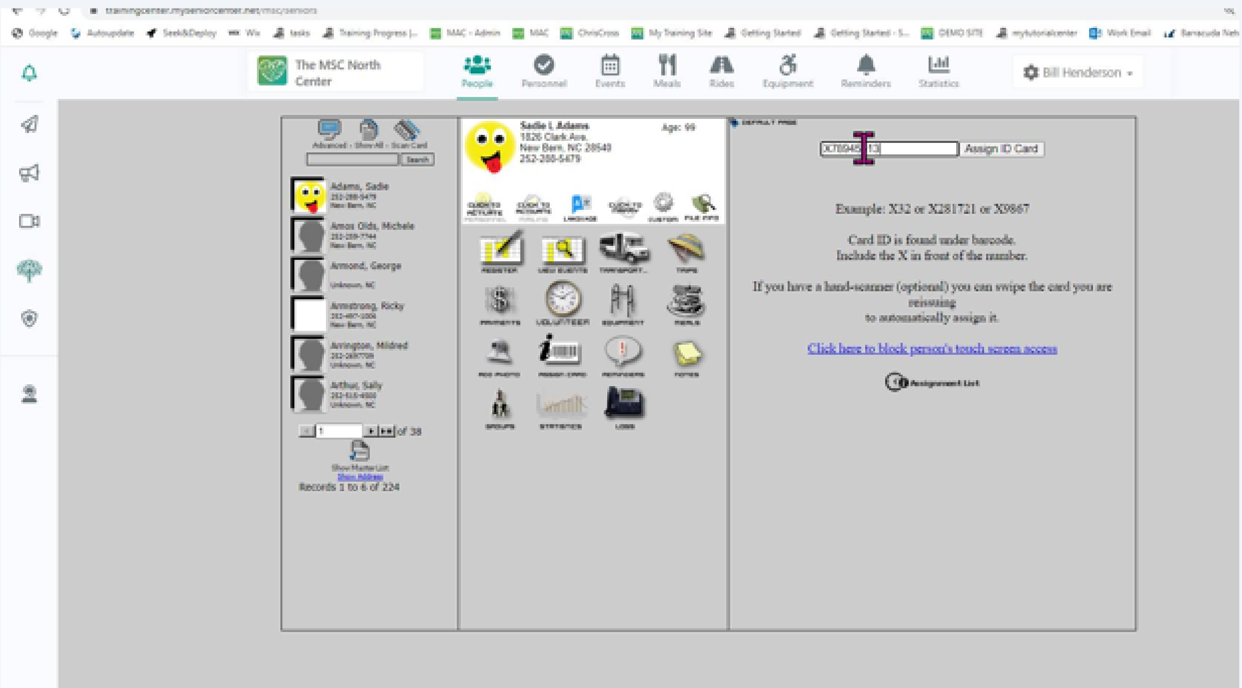
149 You can also take pictures via the touch screen which will learn about in training two

The Assign Card Icon

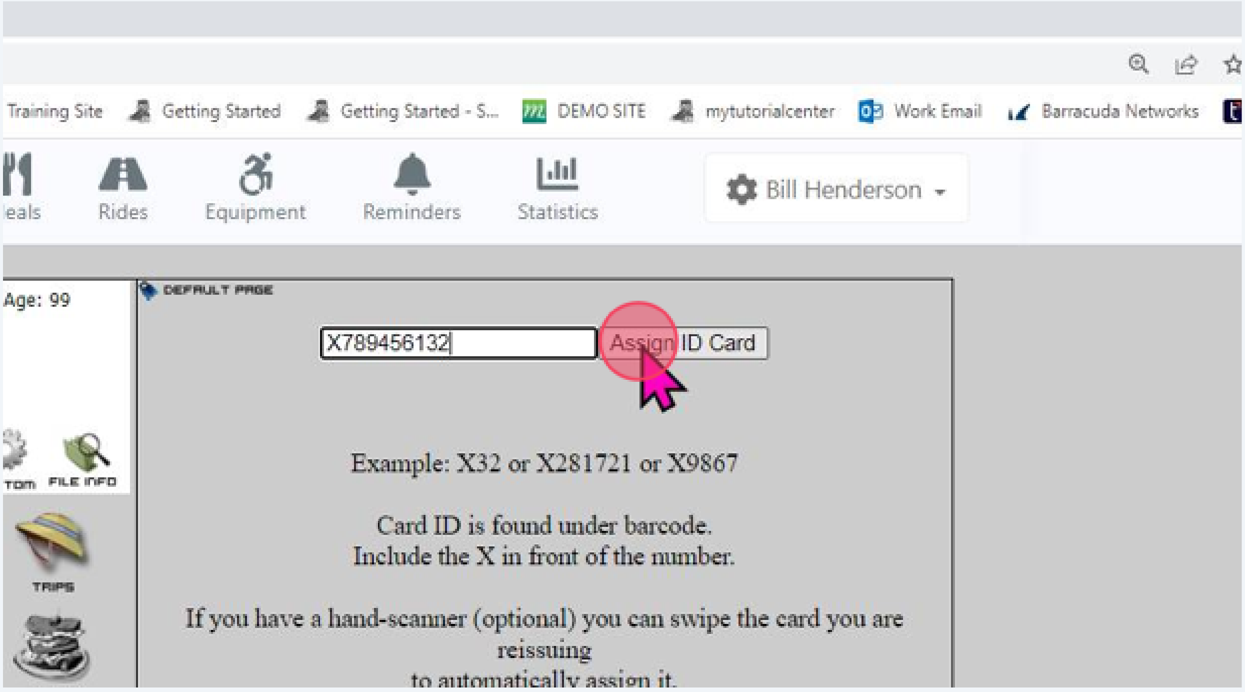
150 Click Assign card



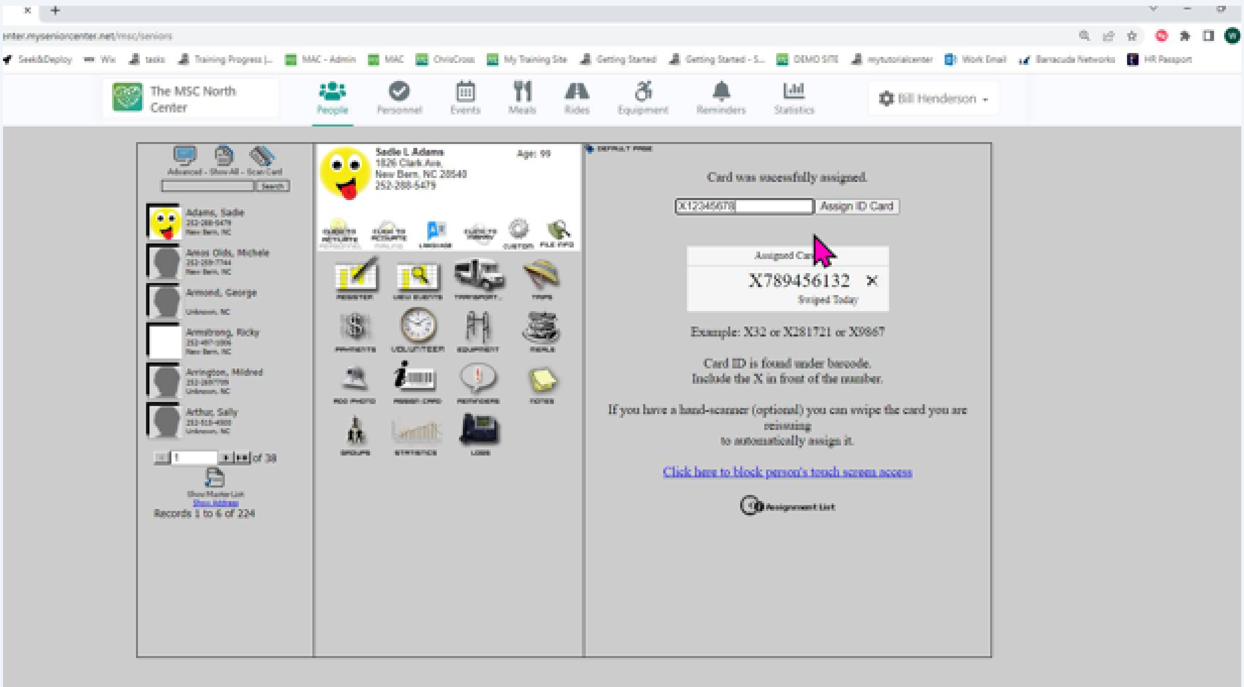
151 Grab a card out of the the box and type the number that is on the card into the textbox to the right.



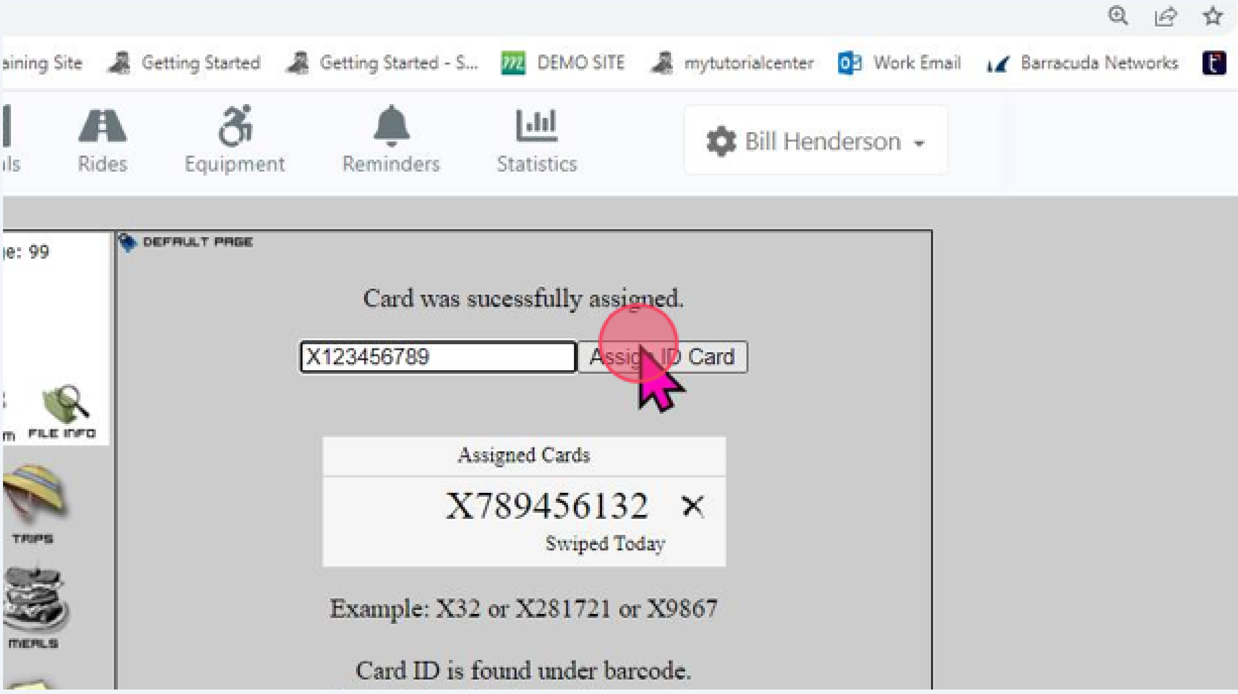
152 Click "Assign ID Card".



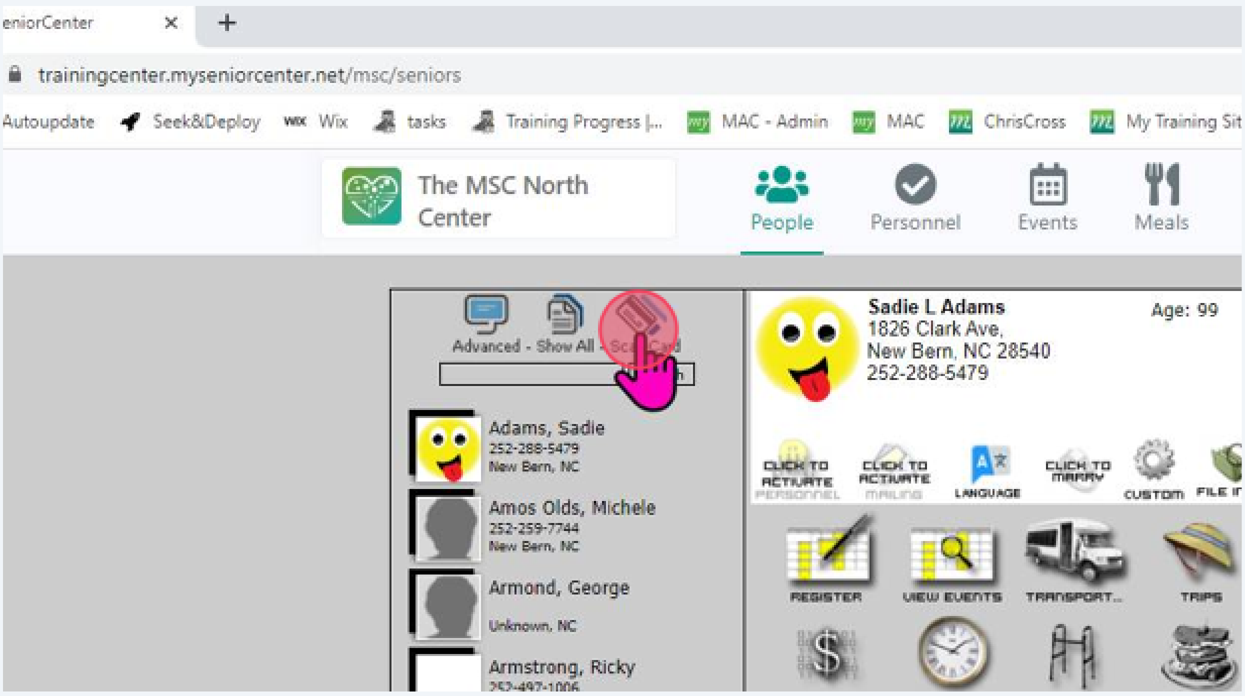
153 Immediately that card is ready to be scanned.



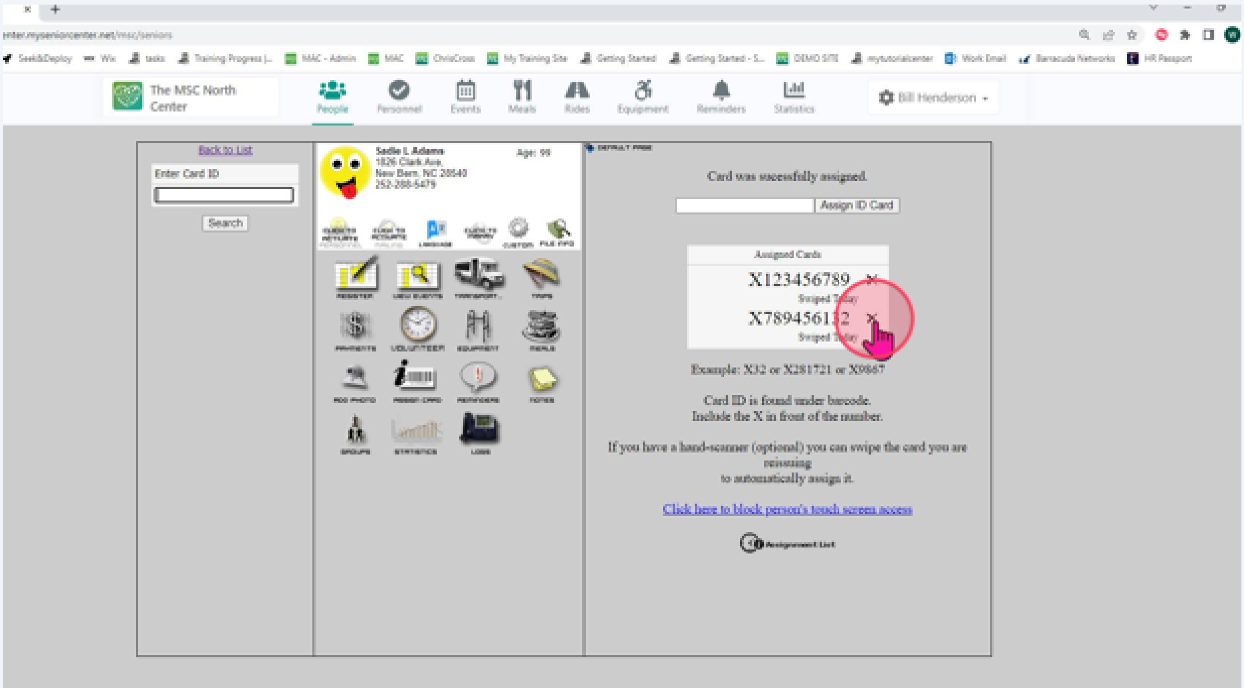
154 If they lose their card simply assign them another card. Either card will work even the old card as long as you have not deleted it. It's best to not delete it because you can search for that card's owner if it's found later on.



155 Click scan card above the search Box and you can type in the card number to search for who that card belongs to. If you had deleted the card and then found it you would have no way of knowing who it belongs to.

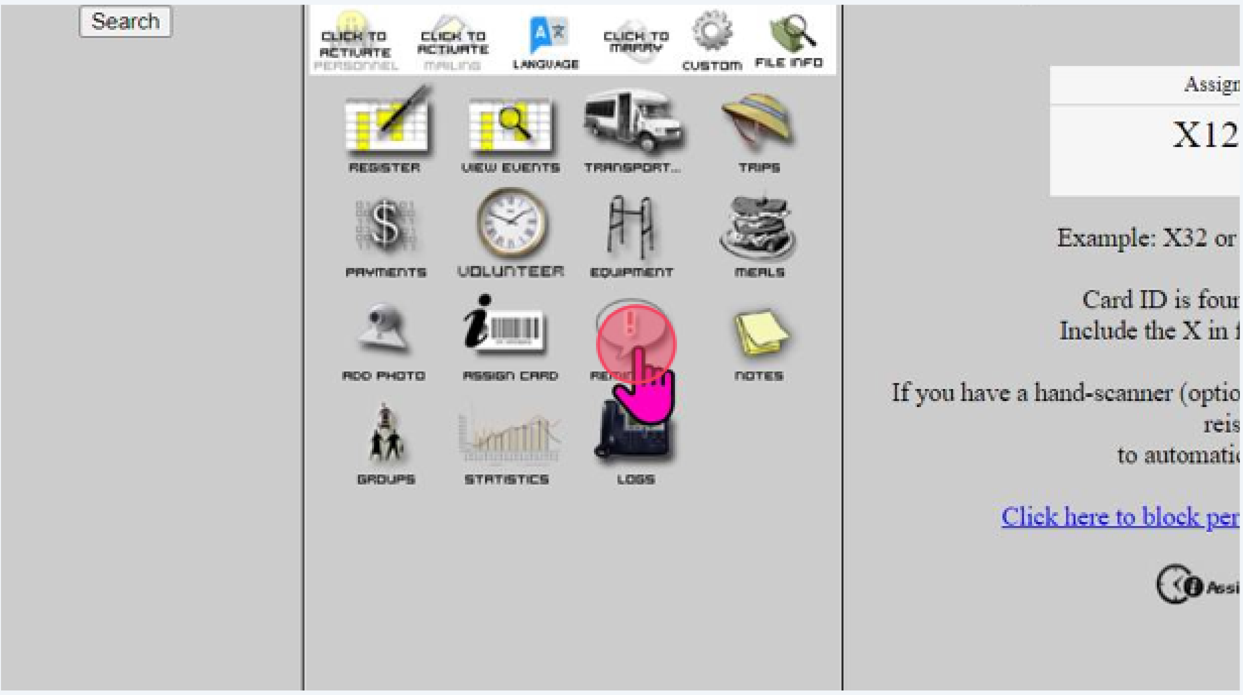


156 The only time you actually have to delete a card is if you want to recycle that card and assign it to someone else. Click the black. X to delete it and now that is a blank card and can be a reassigned to another person.

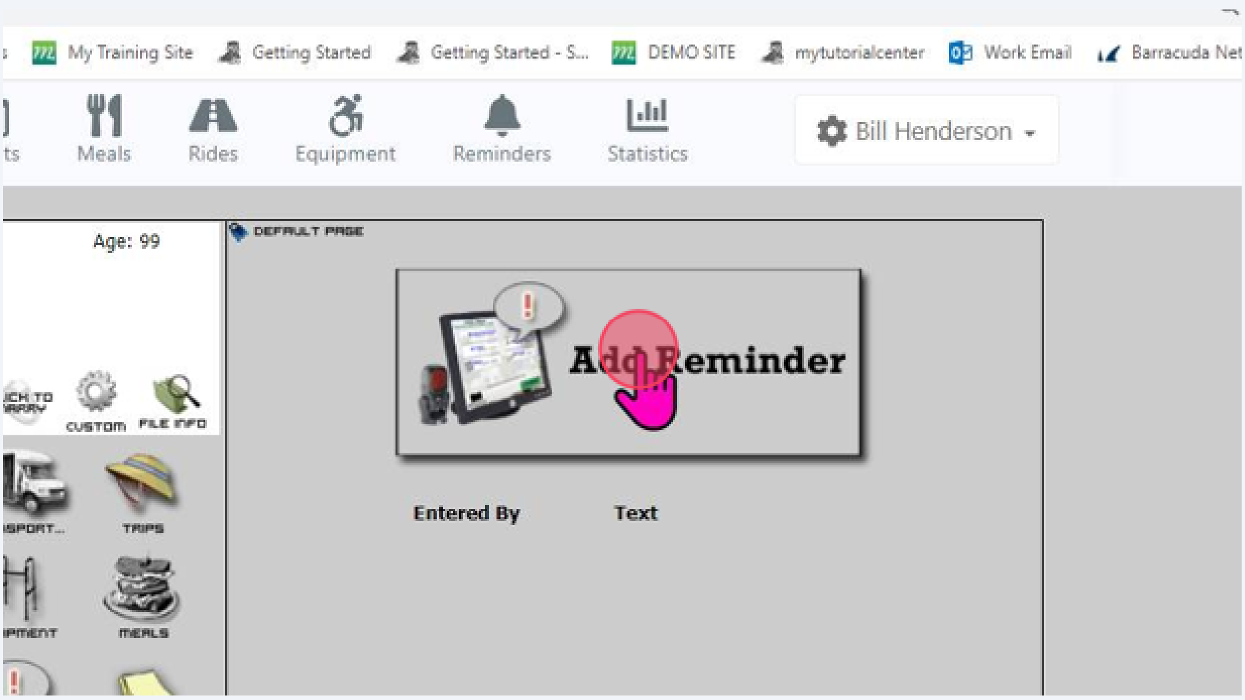


The Reminders Icon

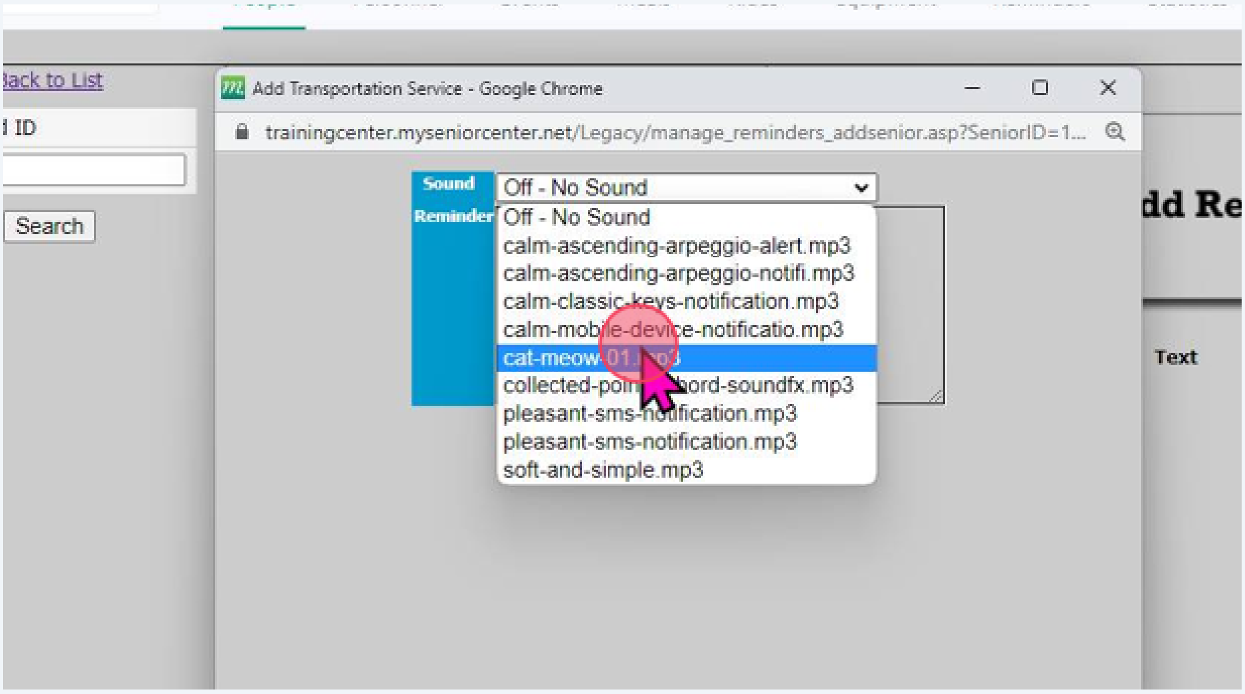
157 The reminders icon allows you to leave messages at the touch screen for the person to see the next time they scan their card. Reminders are the 1st thing they see at the touch screen. It pops up on the screen and covers the entire screen. You have to touch OK to make it disappear.



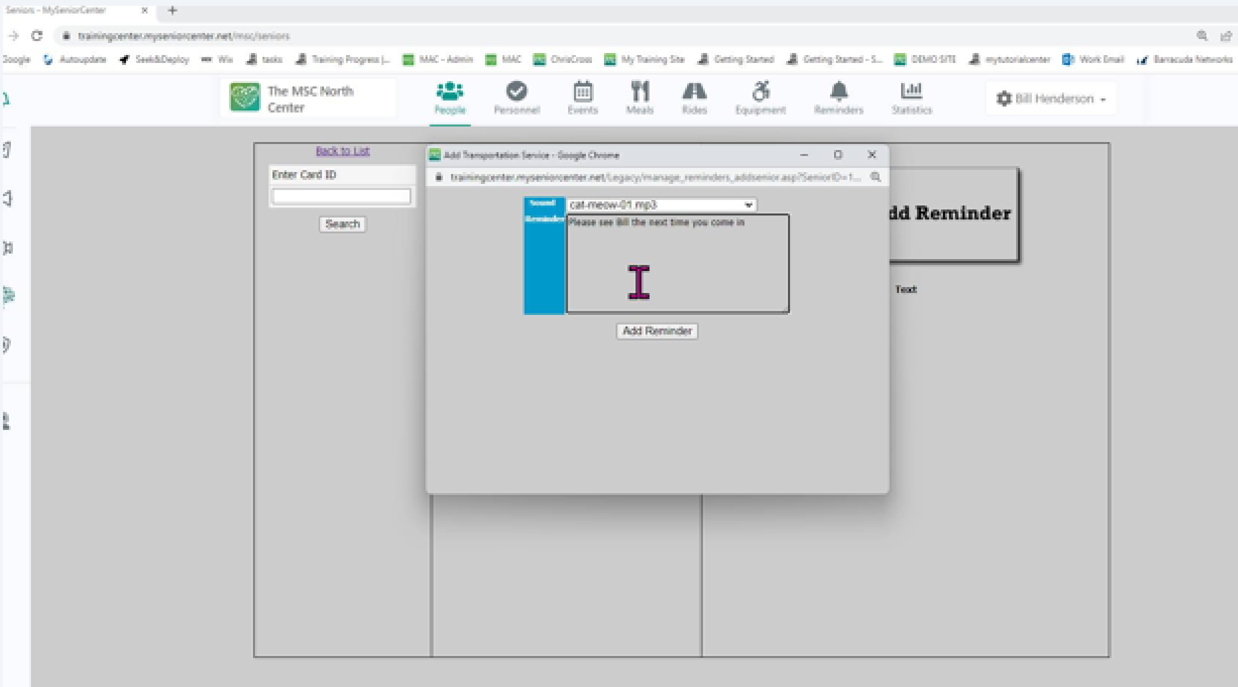
158 Click Add reminder



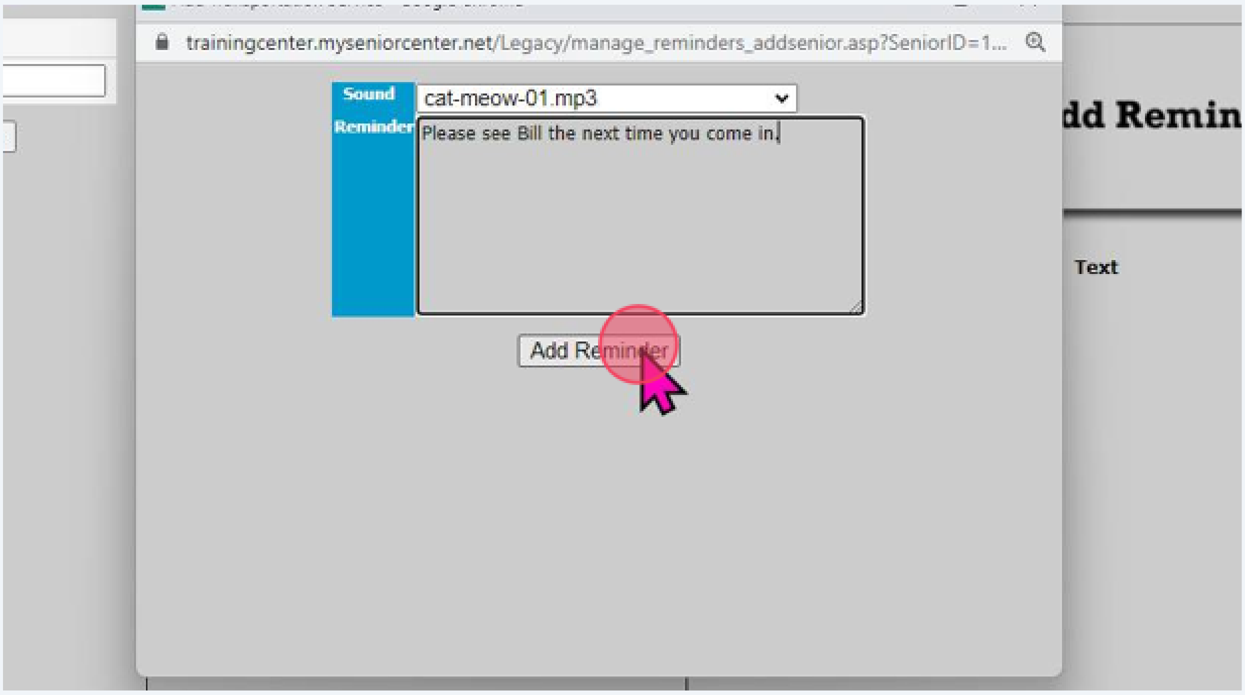
159 Choose a sound effect if you'd like. This is optional.



160 Type in your message



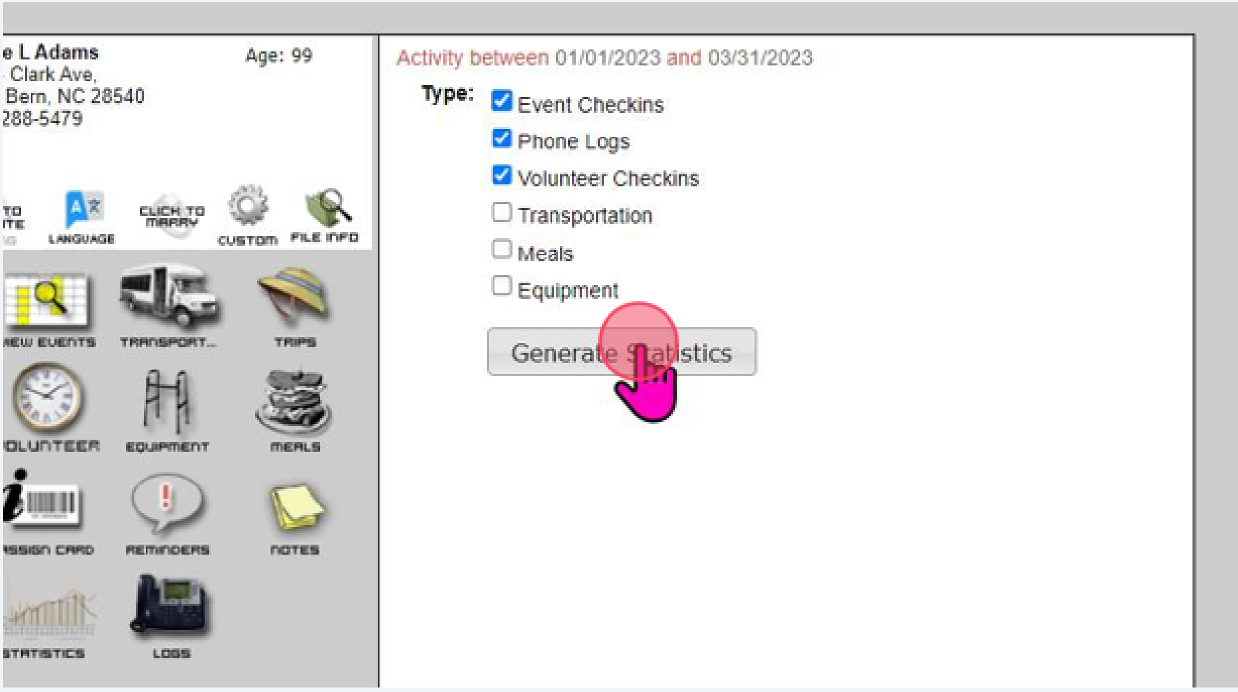
161 Click "Add Reminder"



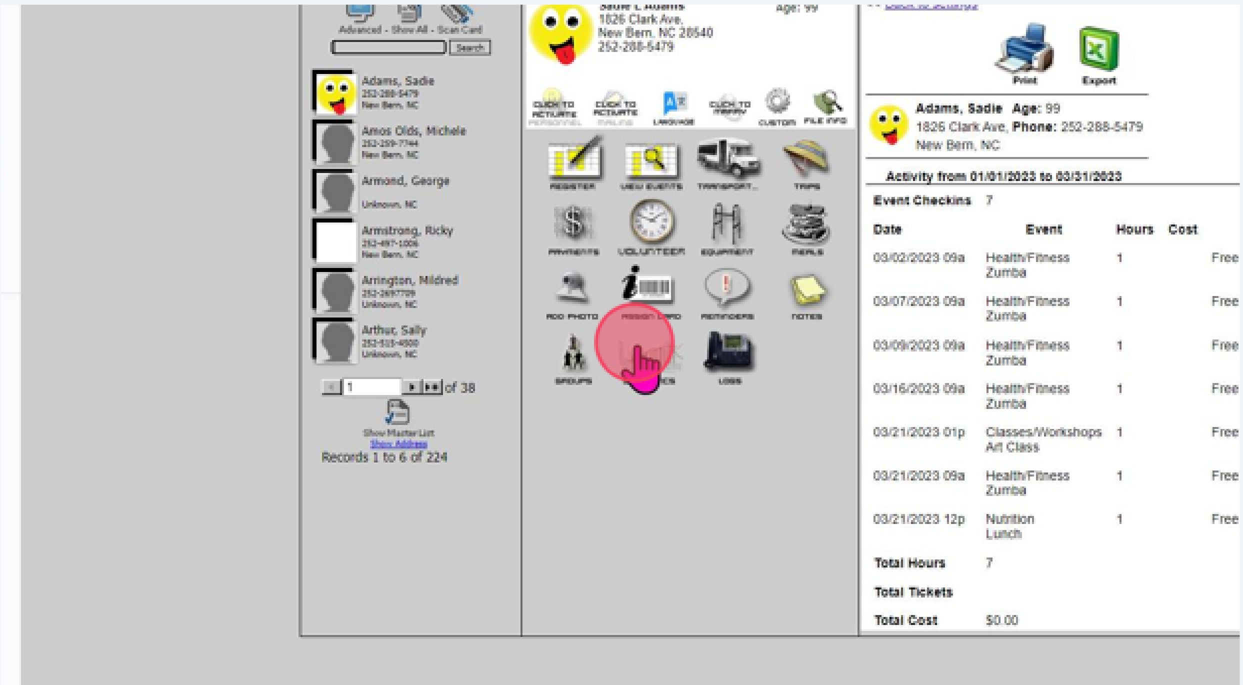
The Statistics Icon

162 Here you can run quick statistics on any individual. Click the statistics icon.

163 Here you can choose the type of activity. You would like to see on the person and you can click either date to change the date range. Then click generates statistics.

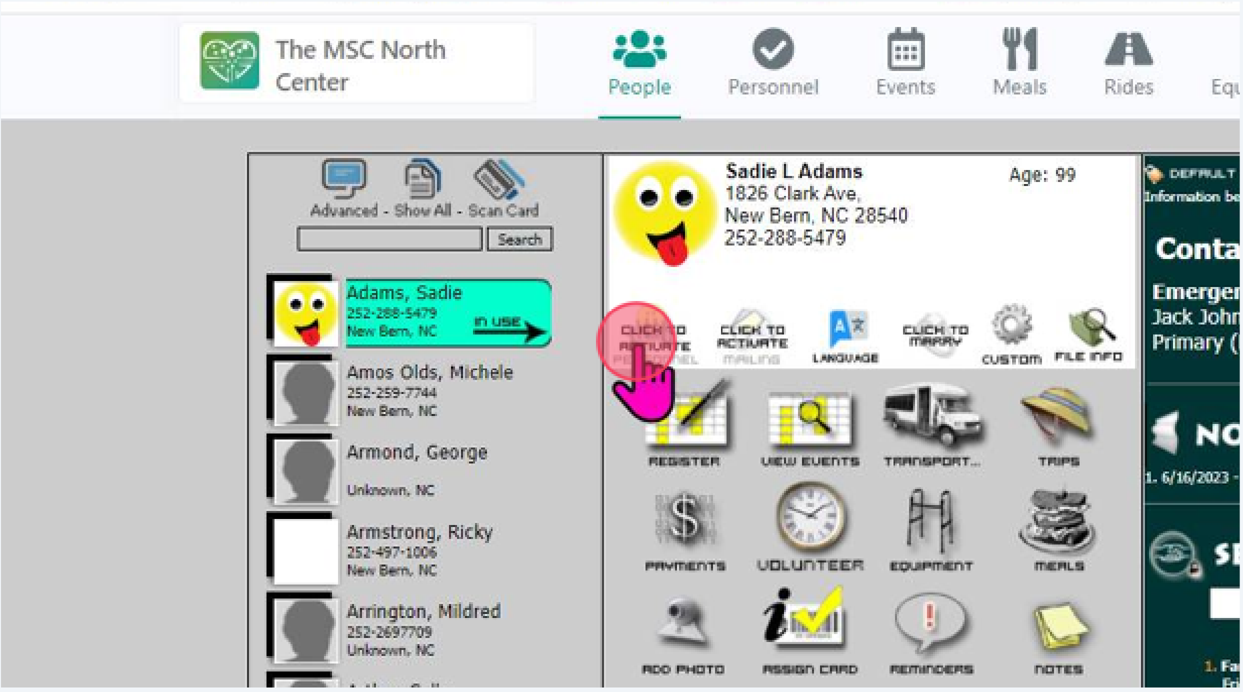


164 Now you can print or export that statistic report

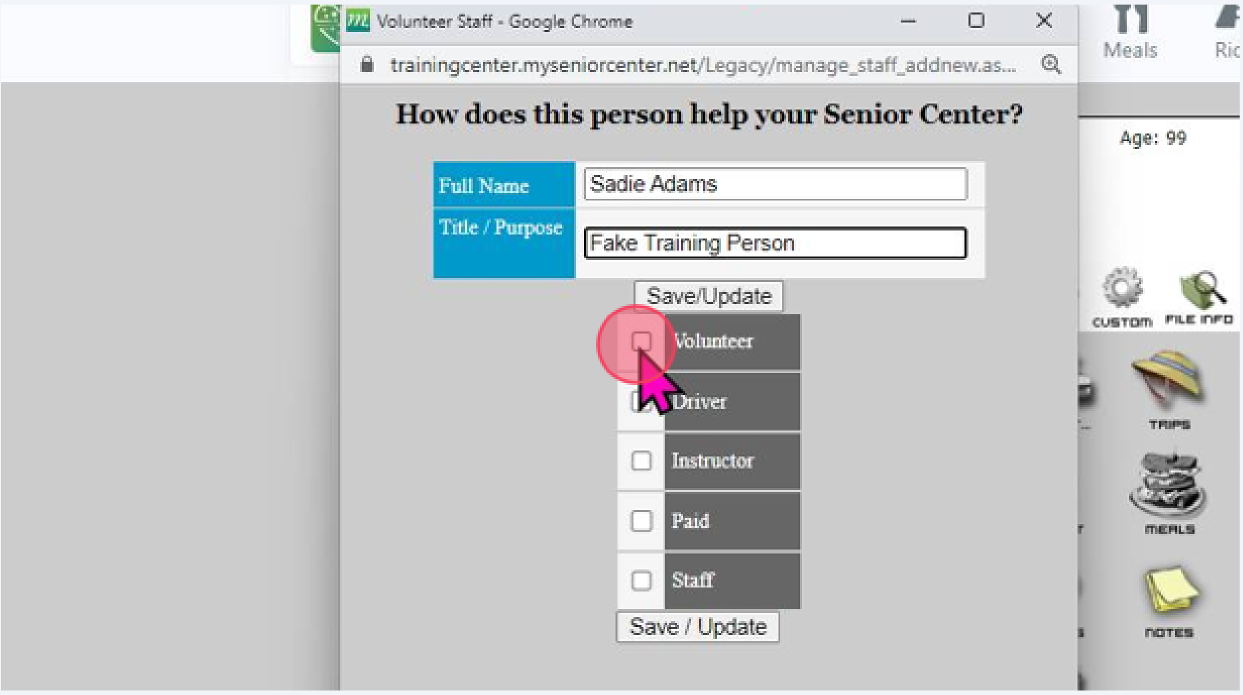


Volunteers, Drivers, Instructors, Paid and Staff

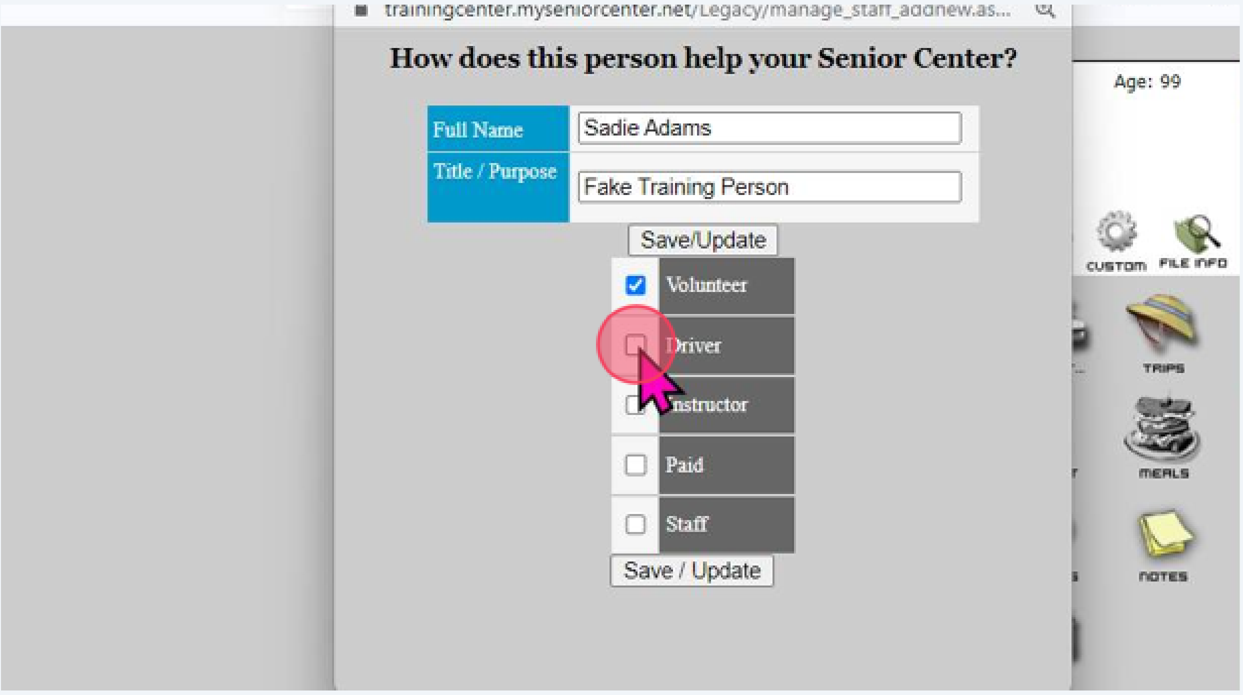
165 Click the "Click to Activate Personnel" icon just below the person's picture



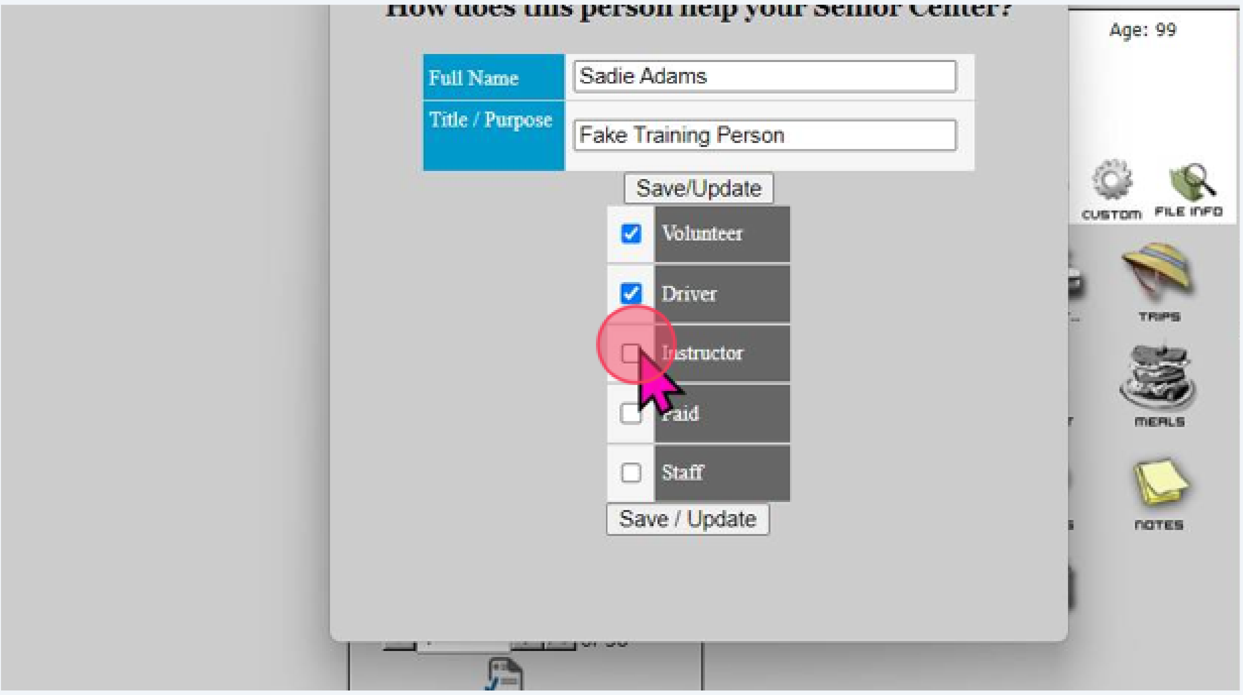
166 Here you can change the person's title/purpose and then you can indicate a few different things. Checking the volunteer box will add this person to your list of volunteers so that you can start entering in volunteer hours for the person.



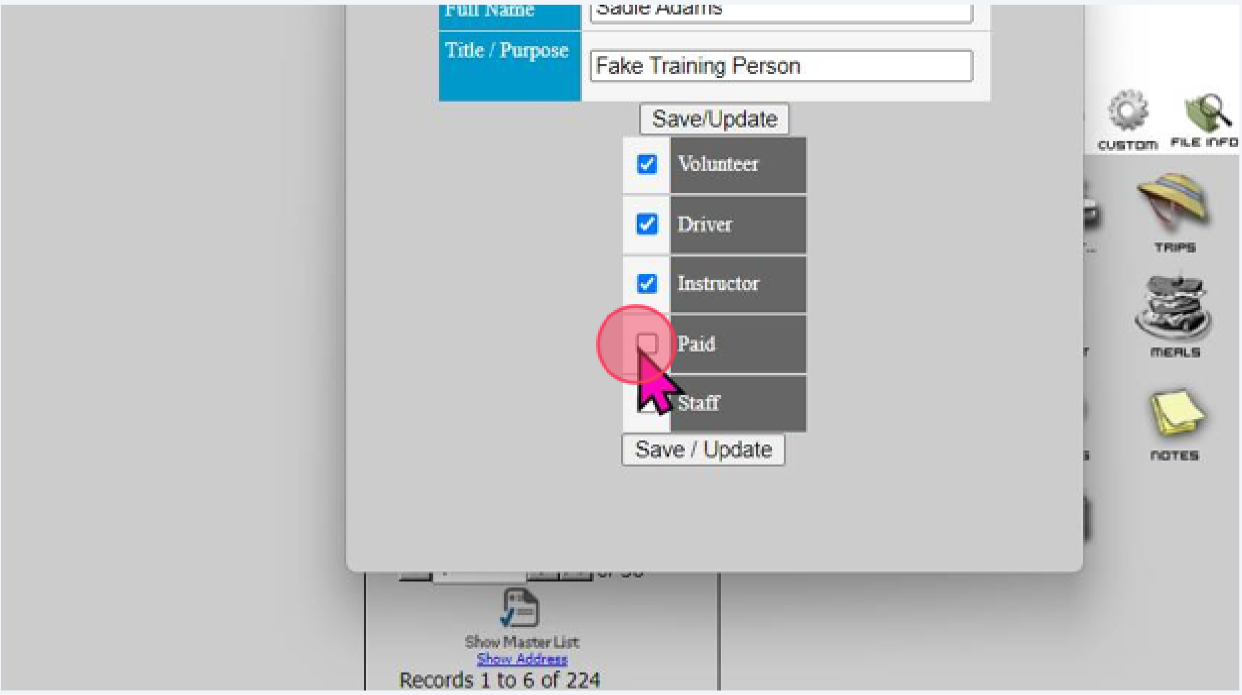
167 Checking the driver box will add this person to your list of drivers so if you schedule a ride for someone else you can choose this person as the driver.



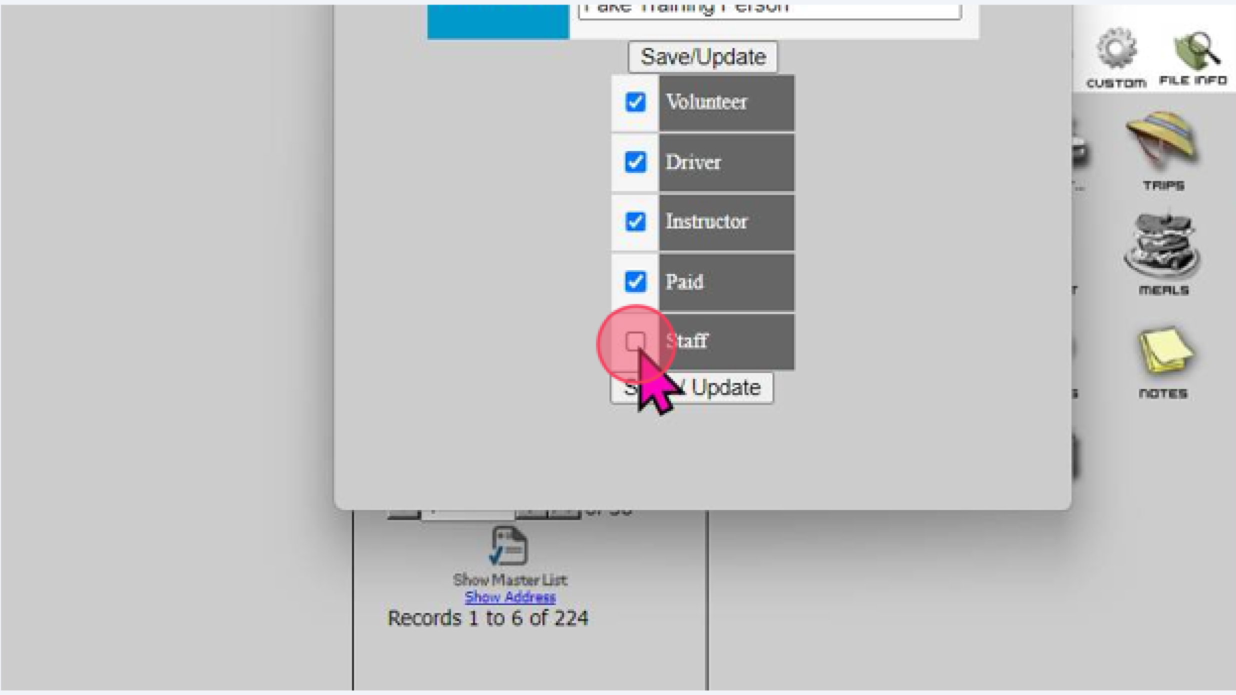
168 Checking the instructor Box will add this person to your list of instructors so if you're setting up a class you can choose this person as the instructor.



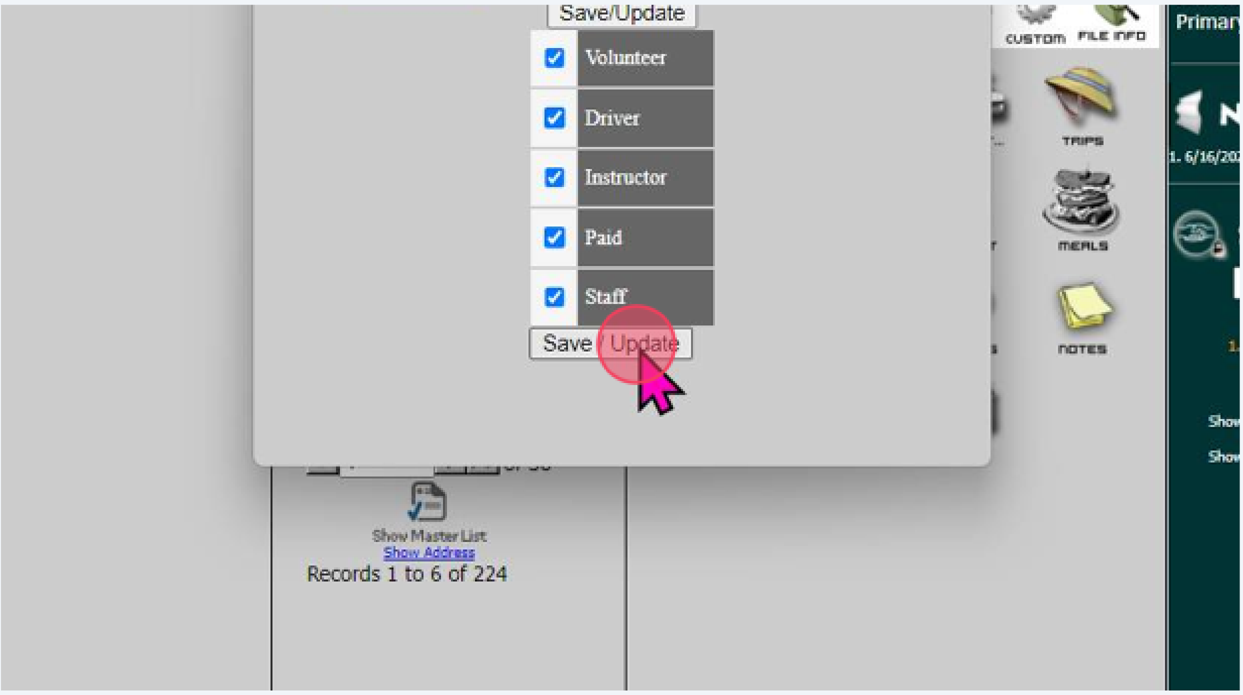
169 You can indicate that someone is paid.



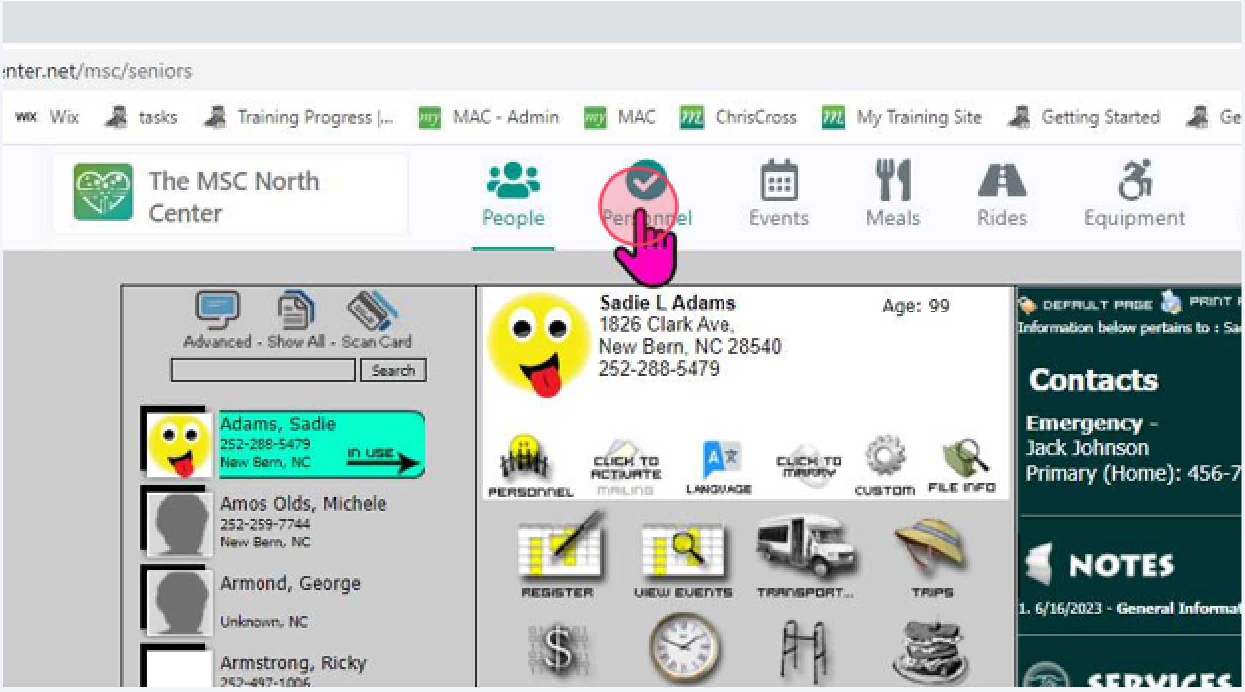
170 You can also indicate if someone is a member of staff.



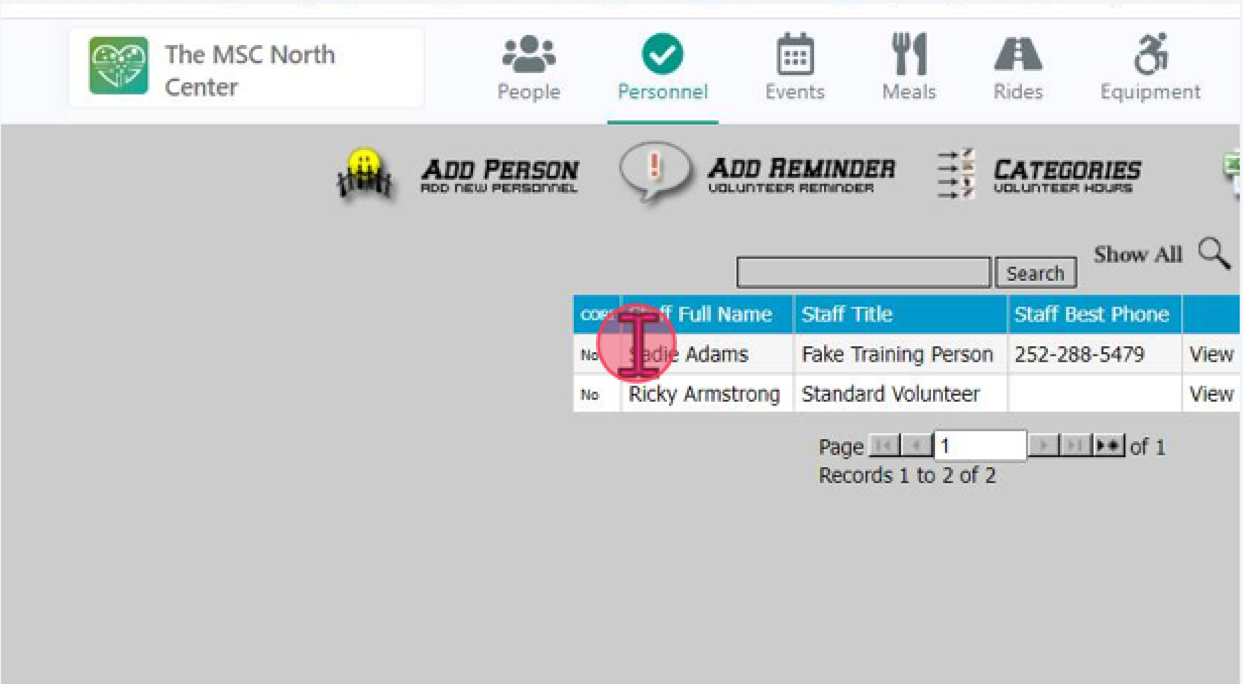
171 Click "Save / Update"



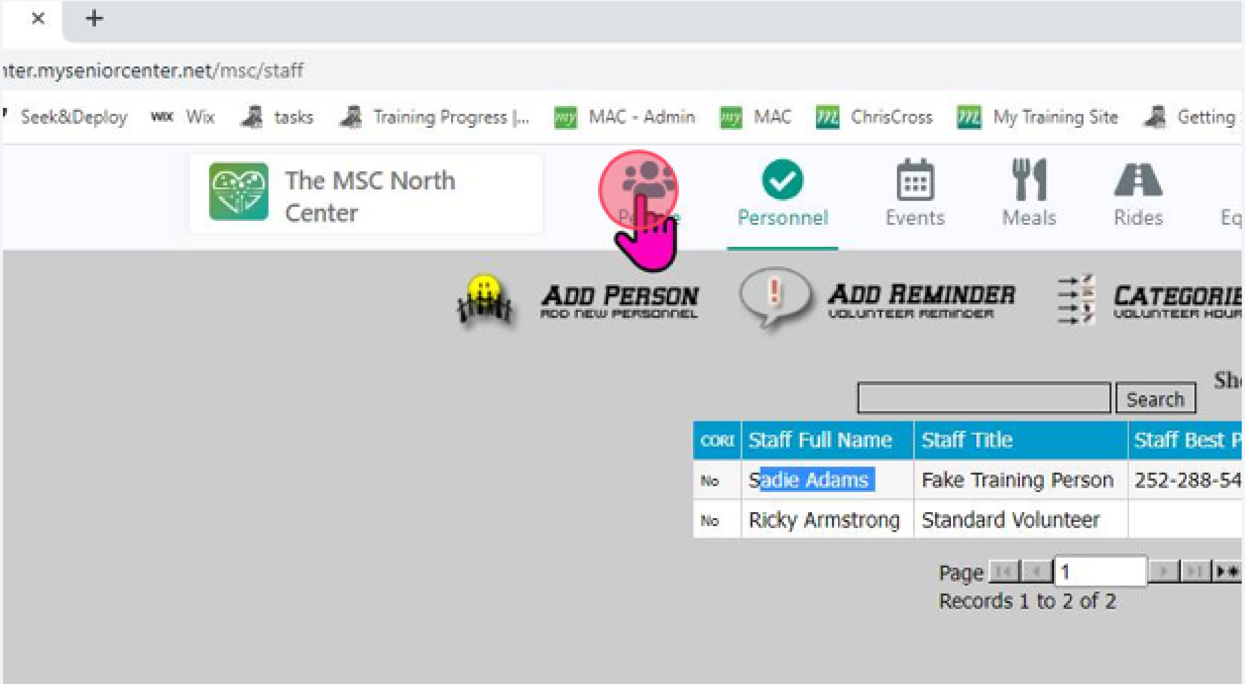
172 This person is still always going to have all of their information under the people tab. Now that you've made them a member of personnel they're also going to have their information under the personnel tab. Click the personnel tab.



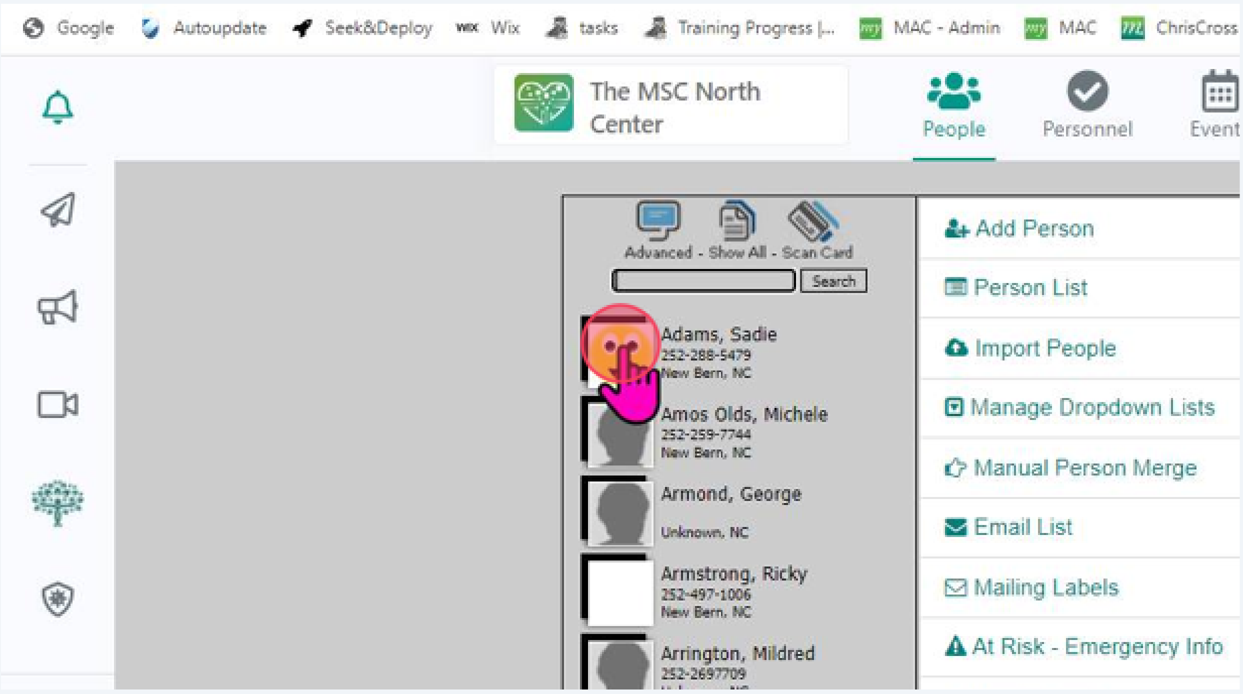
173 Here you'll see a list of anybody that has any one of those checkboxes checked.



174 Click "People"

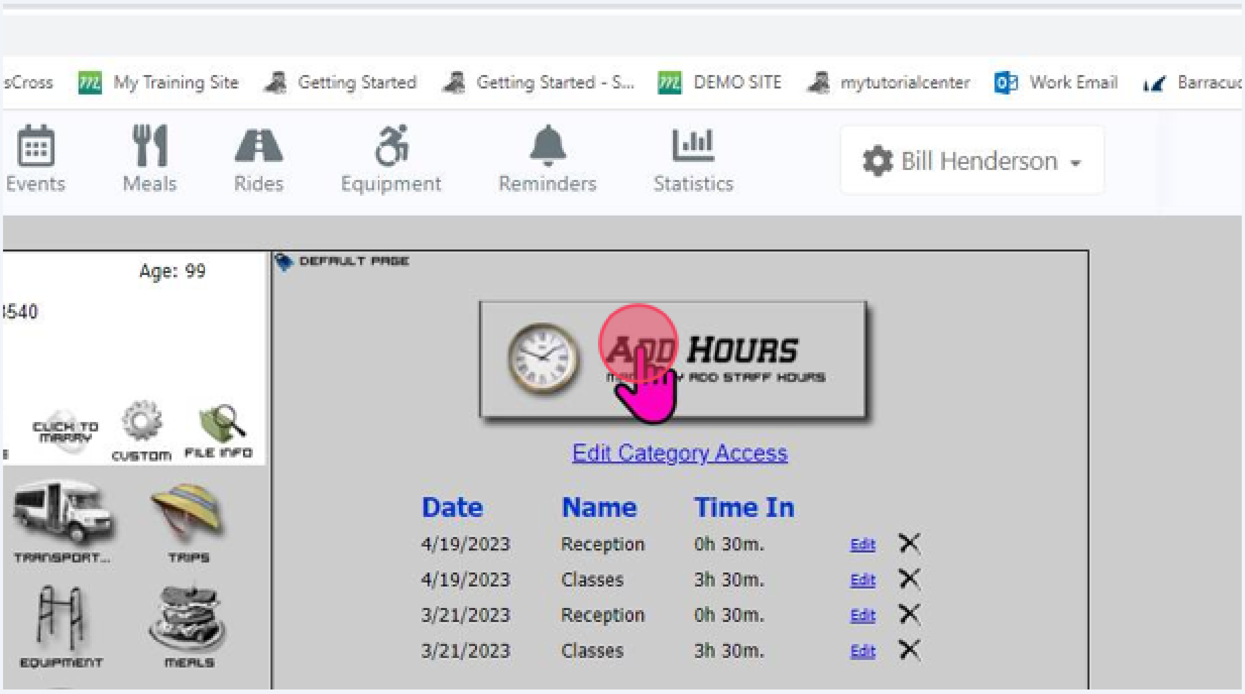


175 Click the same person

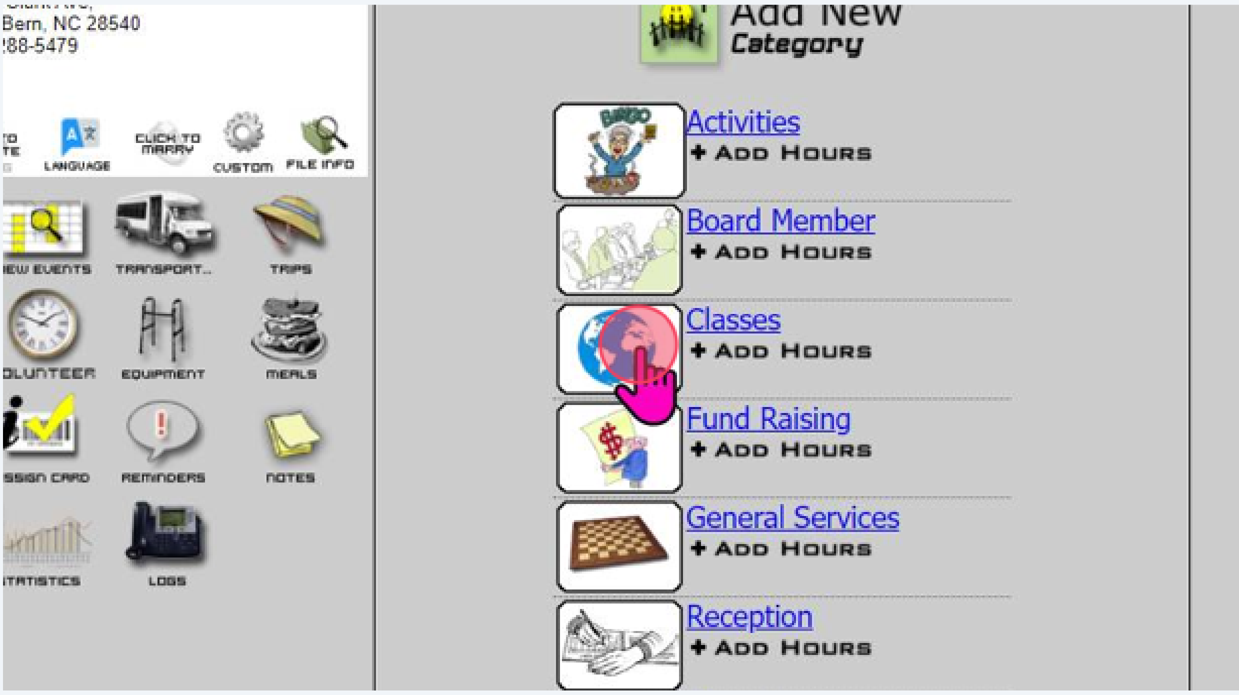


176 Click That person's volunteer clock.

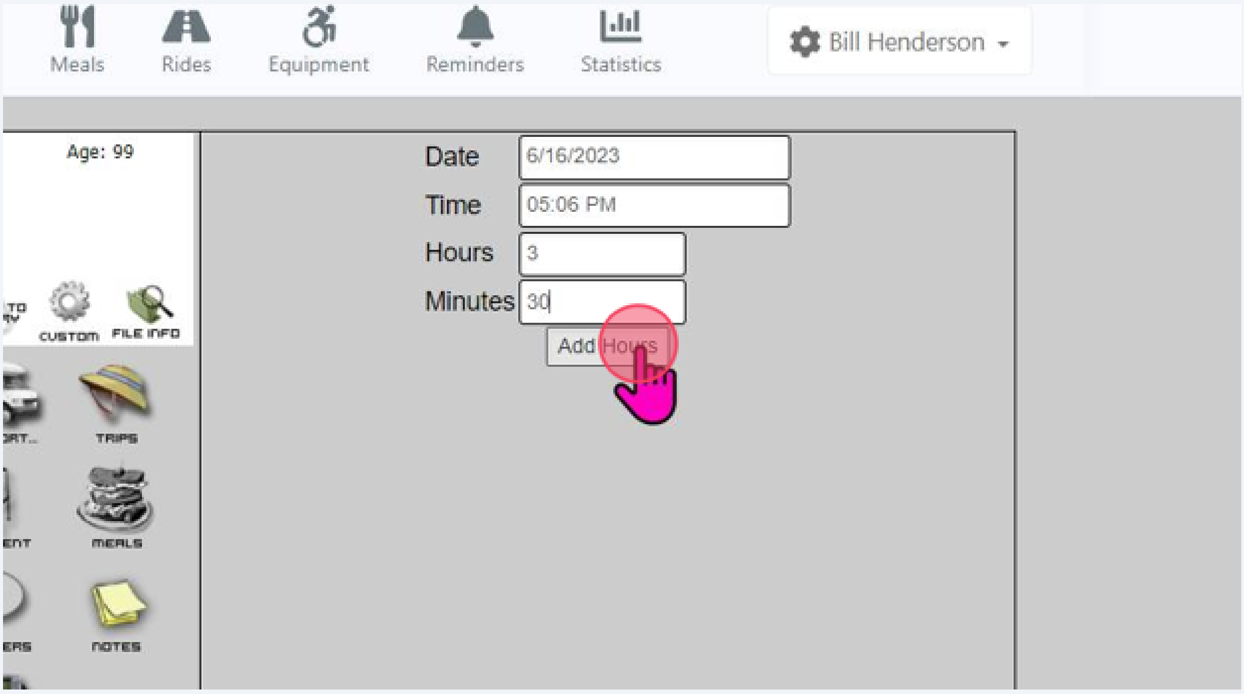
177 Click Add hours.



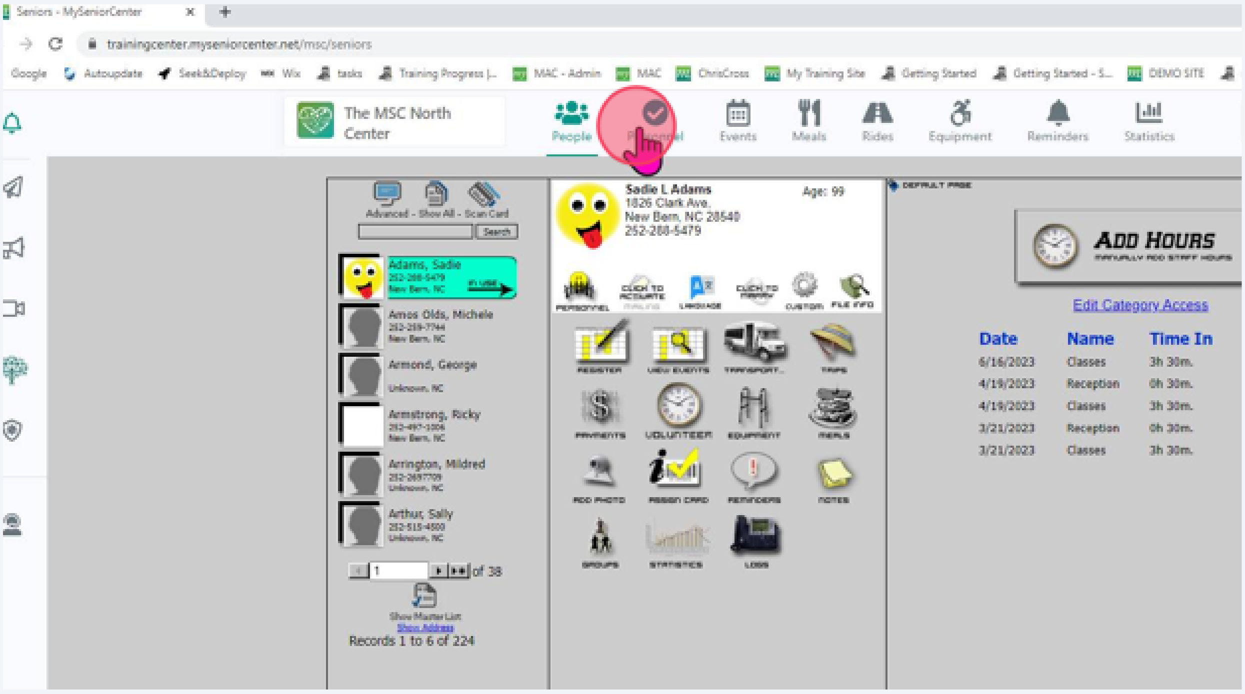
178 Select a category



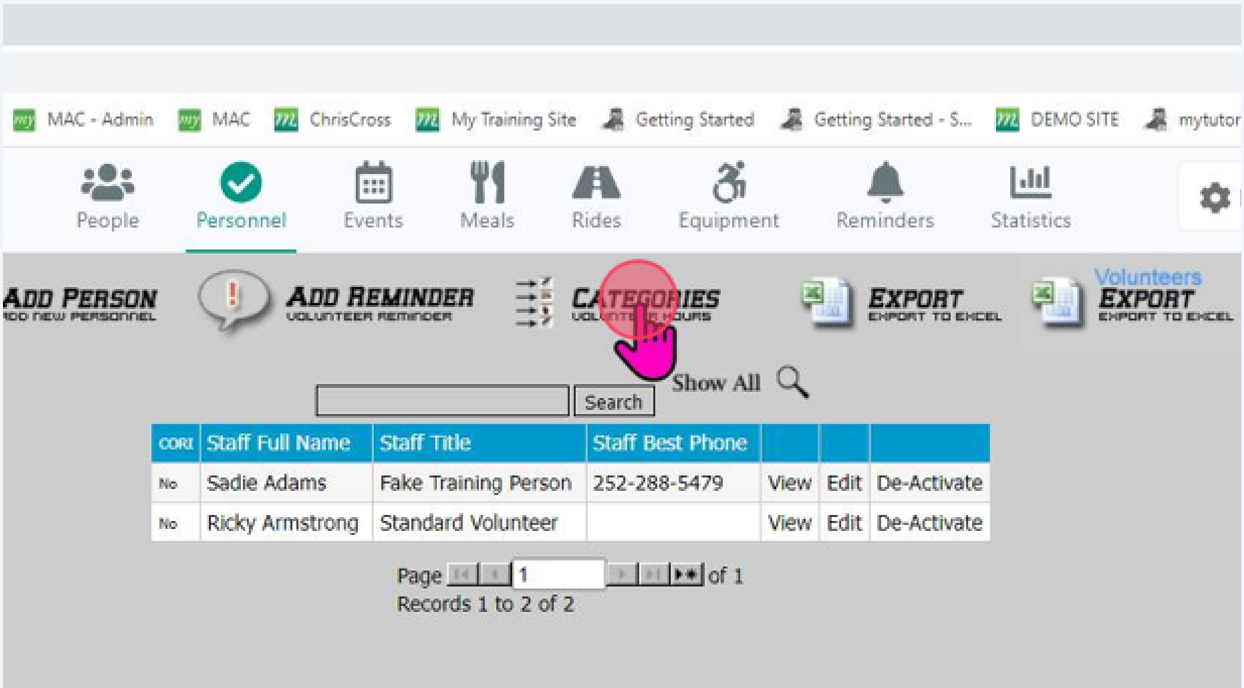
179 The date and time will default to the current date and time but you can change those. You can put in past dates, future dates, and anytime you like. Then enter in hours and minutes and click add hours.



180 Now we can see those hours listed there. In training two you will learn how volunteers can enter their own hours at the touchscreen. Click the personnel tab.



181 Click categories



CORI	Staff Full Name	Staff Title	Staff Best Phone			
No	Sadie Adams	Fake Training Person	252-288-5479	View	Edit	De-Activate
No	Ricky Armstrong	Standard Volunteer		View	Edit	De-Activate

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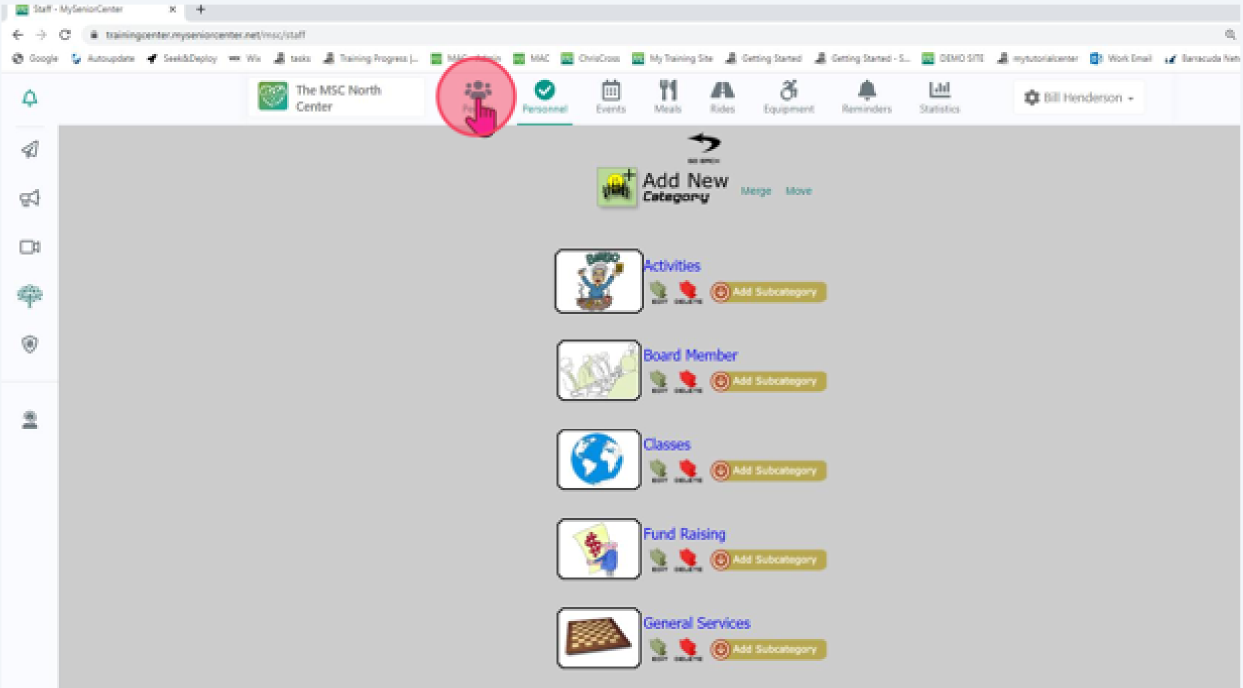
182 Here you can customize that list of volunteer categories. You're able to add categories, edit categories, delete categories and you can add subcategories if you'd like to get more specific. Click back to the people tab.



183 You have completed MSC Training 01, People and their data. In MSC Training 02 you will learn all about keeping track of attendance.