OrangeSky

MyOS

TEAM LEADER GUIDE

YOUR MYOS GUIDE

This guide will help you manage your team and shifts in **MyOS**, Orange Sky's volunteer management system.

This Guide will go over the key features of MyOS for a Team Leader or Volunteer Leader, including:

YOUR MyOS GUIDE – LEADERS

Welcome to MyOS! This guide will give an overview of the functions of the Team Leader & Volunteer Leader profile in MyOS, Orange Sky's volunteer management system.

As a Team Leader, you have two different profiles within MyOS. You have a portal view as a volunteer and an administrator view.

You can also refresh yourself on Team Leader role requirements in this E-learning module.

PORTAL VIEW

For details on the portal view, please use the MyOS Volunteer User Manual. The guide includes information about:

- Logging in
- Navigating MyOS
- Completing your profile
- Viewing notifications
- Training
- Your activity history
- Reporting incidents
- Changing your availability
- Viewing your roster
- Browsing volunteer opportunities
- Accessing the Volunteer Resource Hub

You'll use the Portal view for most Team Leader responsibilities. The Administrator View is where you'll roster your team (see below).
As a Team Leader, MyOS will automatically open into the Admin view, however most tasks can be completed in the Portal View.
To switch to the portal view, please click on your profile in the top right corner and select "View Portal" (see below).

All Volunteers have access to a Portal view. As a Team Leader, this is where you'll find:

- Shift reports
- Upcoming shifts
- Checking your team in and out

As a Team Leader, you can view the shift impacts within the "My Shifts" tab on the Navigation Bar within the portal.

Checking your team in and out

We'd encourage you to ask your team to check in and out of a shift. You could remind them to do this during your start and end of shift huddles. Volunteers can retrospectively check in and out within 2 hours of the start or finish time.

If you need to check your team in and out of a shift yourself, navigate to your "**MyOS Dashboard**". Click on the shift name, under **"Shifts I'm Leading"**. From here you will be able to check the team in and out, or mark if they weren't able to attend.
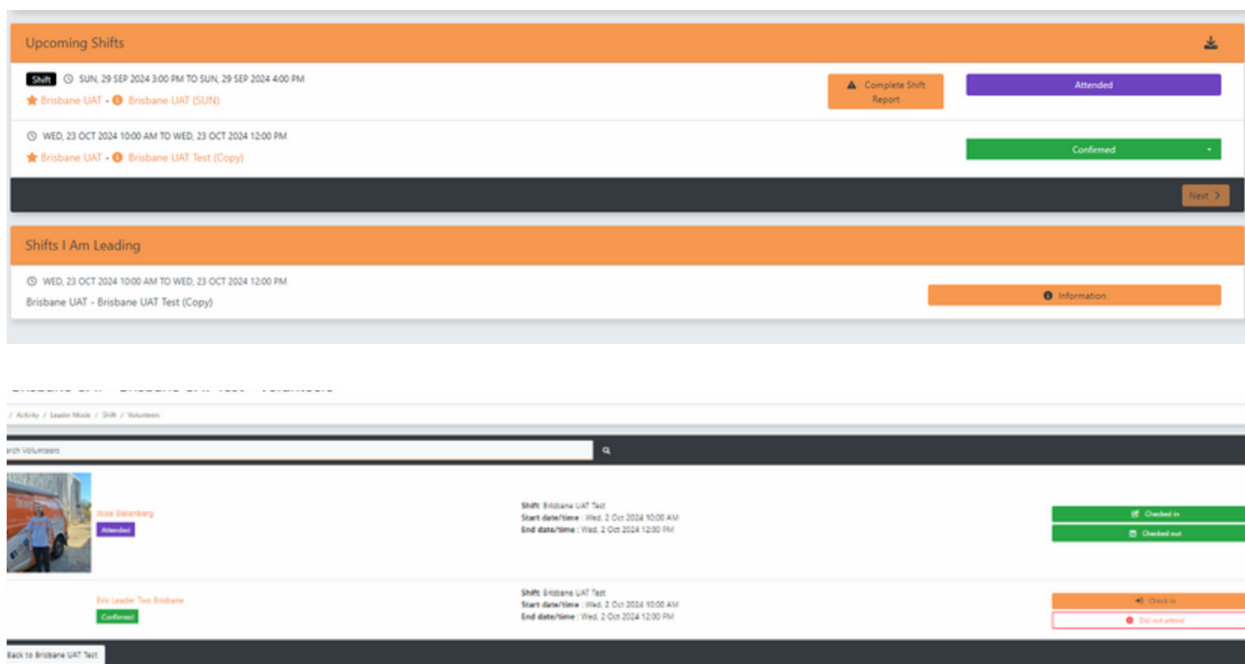
ADMINISTRATOR VIEW

When to use Administrator View

The only tasks to be completed in Admin view is rostering and accessing your team's contact details.

With your Team Leader login, your MyOS will automatically open into the Administrator view we showed above.

Viewing Volunteers

To view volunteers allocated to each shift, click on the clock icon next to the shift name. On the below, you can see this is on the far right side next to the shift name. From there, click on the people icon on the far right side.

You can also view volunteers from the **"Volunteers"** tab on the navigation bar. Click the person icon on the far right side to see their details, such us email, contact number and emergency contact details.
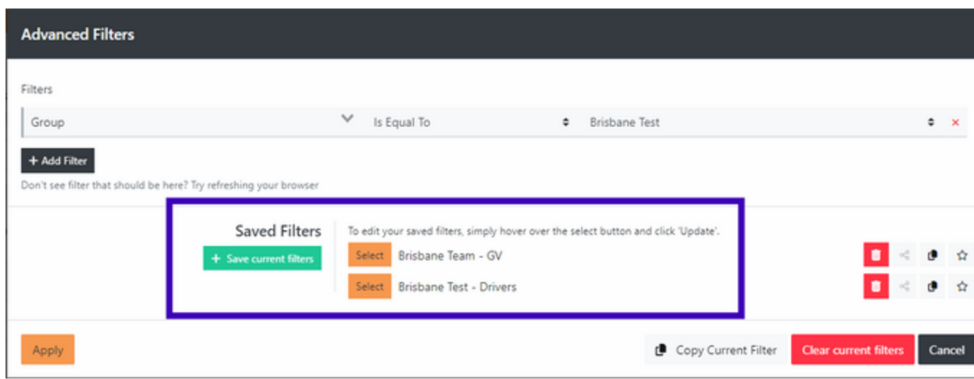
Rostering your team

Creating a Filter

Before rostering, we suggest you create filters to view the volunteers. You will only need to do this once, and can save the filter for all future rostering.

Under the "Volunteer" tab under "Volunteers" select the "Advanced filter" button. This will open the below "Advanced filter" pop up.

You'll then need to create a filter for both your general volunteers and drivers. To create the filter click the **"+Add Filter"** button and please select the below drop-down options for the fields:
- "Filters" select "Group"
- "Equal to"
- Shift name e.g. "Brisbane Test"
- Click "Save current filters" and name the filter e.g. "Brisbane Test - Drivers" and click "Save"

If you have a van shift, please save a filter for the General volunteer group and the Driver group. See examples below.

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Once you've set up your filter, you are ready to roster!

Rostering

There are two ways you can view your team's roster, through the schedule view which gives you a bulk calendar view or your list view, which shows a single shift.

They have slightly different functions, which we'll go through below. If you're working on a mobile phone or tablet, we recommend the list view.

In the navigation bar select **"Shift Rosters"** under the **"Shift Rosters"** tab.

List View

Top tip: Save this page as a Bookmark!
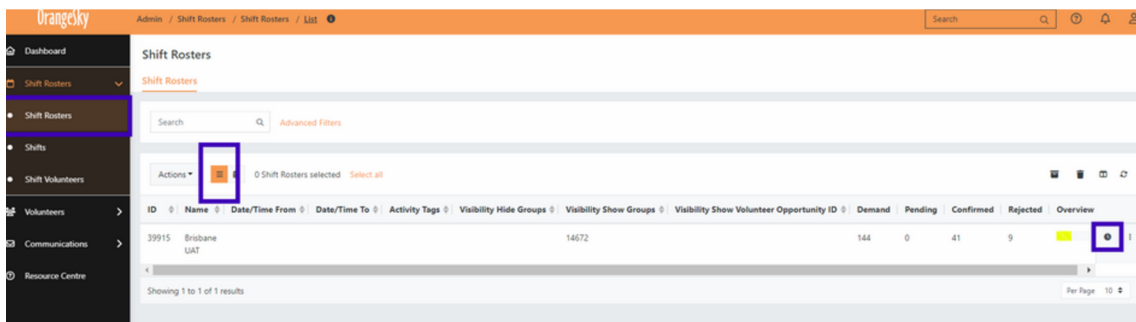
To roster in the list view, make sure the 'list icon' (*as pictured above*) is selected.
Click the 'clock icon' on the right hand side.
You will have a list of upcoming shifts by date. On the day you would like to roster for, click the 'view volunteers' icon on the right hand side.
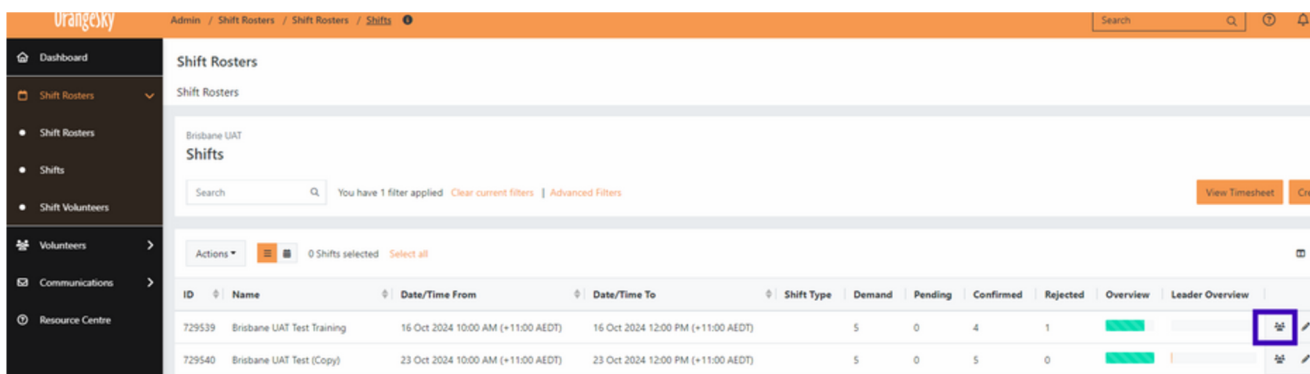
To add volunteers to a shift, select the orange "Add" button on the top right above the list of shifts.
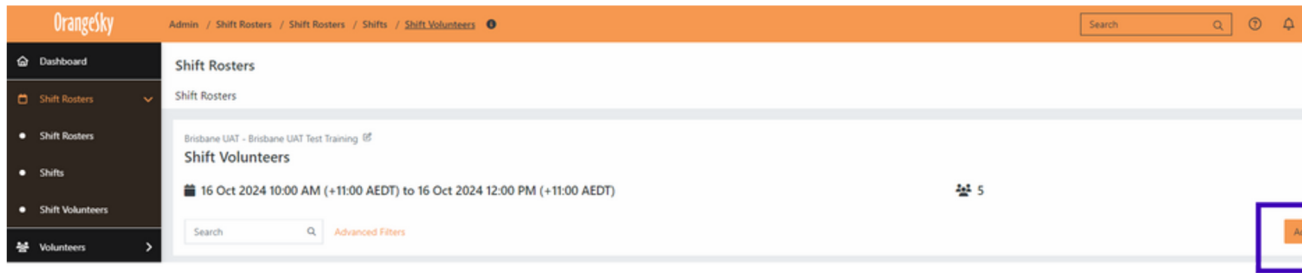
Rostering Drivers

To roster your driver, first click on your saved filter, e.g. "Brisbane Test - Drivers".

Click the tick box for "only show volunteers available at this time". This will remove any volunteers who have marked themselves as unavailable for this time period.

All available volunteers will appear below. Next, click the driver volunteer you would like to roster for this shift, and drag & drop them onto the rostered shift.
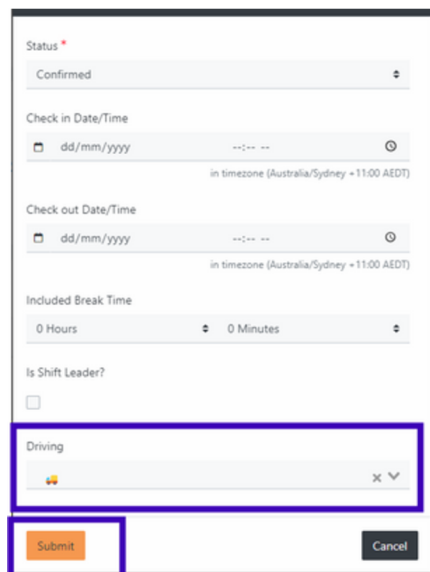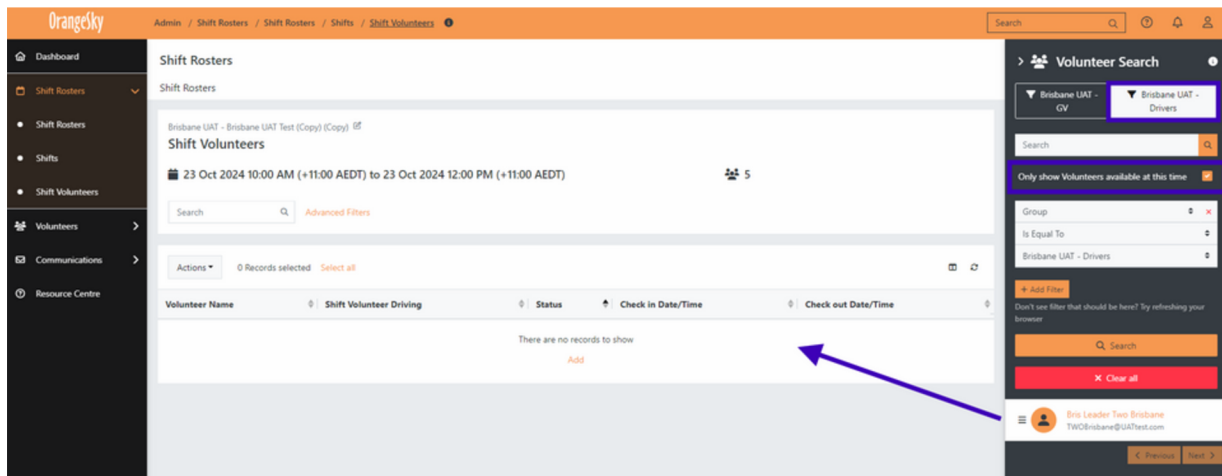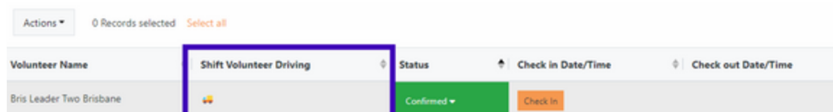

Once you drop & drag the volunteer on to the shift keep the "Status" as "Confirmed".

You do not need to adjust the check in and check out times here.

Using the "Driving" drop down, select the car icon. Click "Submit".

On the roster, you will see the car icon against the driver.

Rostering a Shift Leader

Each shift must have an assigned Shift Leader. The Shift Leader will be assigned the shift report to complete, and can check volunteers in and out if needed. If you're not able to attend, please select another volunteer as the Shift Leader.

Once you drop & drag the volunteer on to the shift keep the "Status" as "Confirmed".

You do not need to adjust the check in and check out times here.

Tick the "Is Shift Leader?" box. Click "Submit".

On the roster, you will see a star icon against the Shift Leader.

Rostering General Volunteers - List View

To roster the volunteer team, first click on your saved filter, e.g. "Brisbane Test - GVs".

Click the tick box for "only show volunteers available at this time". This will remove any volunteers who have marked themselves as unavailable for this time period.

All available volunteers will appear below. Next, click the driver volunteer you would like to roster for this shift, and drag & drop them onto the rostered shift.

Switching views

We'll now show you how to roster in the calendar view. The easiest way to navigate to the calendar view, is to go back to the shift option from the top of the screen.

To switch to the bulk view of rosters, please select the calendar icon, called "Schedule View".
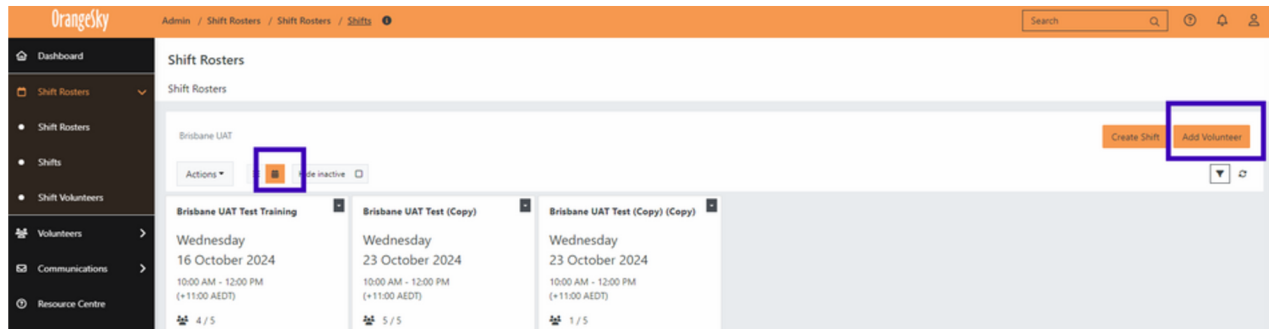
Rostering - Schedule View

Click the "Add Volunteer" button and follow the same instructions as above for the list view.

Note: when rostering in 'schedule view' there are a few differences.

- There is no "only show volunteers available at this time". This is because the system does not know which specific date an unavailability aligns to. If you roster a volunteer on a shift on a date they are unavailable the below pop-up will appear.

- You can drop & drag volunteers from one shift to another. This works like copy & paste.

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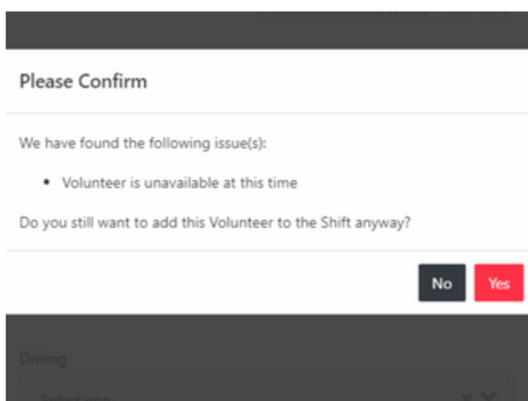
Roster Without a Filter

If you haven't saved a filter, you can set a filter directly from the shift roster. Click the "+Add Filter" button and select the below drop-down options for the fields:
- "Filters" select "Group"
- "Equal to"
- Shift name e.g. "Brisbane Test - Drivers".
- Click "Search".
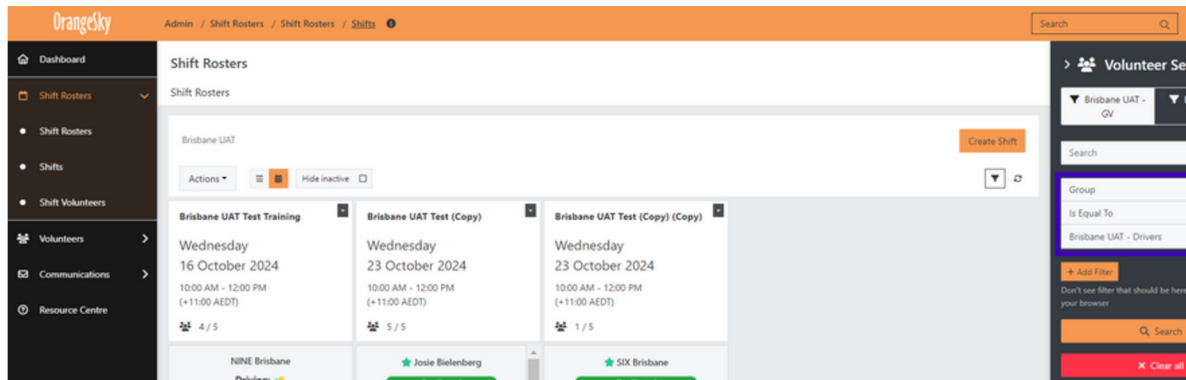

Roster Alerts

Rosters are automatically published in MyOS, however, volunteers are not alerted immediately when added to a roster. This allows you to freely edit and adjust your roster without worrying about sending multiple notifications.

Rostered volunteers will receive a shift reminder 1 month, 14 days and 48 hours before their rostered shift. They do not need to confirm shift acceptance, but they can withdraw.

When you complete a roster, we suggest that you let your team know (on WhatsApp) to jump in to MyOS and view their 'Upcoming Shifts'.

Cancelling a Shift

You may need to cancel a shift, for reasons such as lack of volunteers or inclement weather.

To cancel a shift in MyOS, please navigate to the Admin View. Go to "Shift Rosters" under "Shift Rosters" and click on the 'clock icon'. Click the ellipses next to the shift you're looking to cancel. From the drop down menu, please select "cancel". A pop up will open to confirm if you'd like to cancel the shift. The volunteers for that shift will be notified.
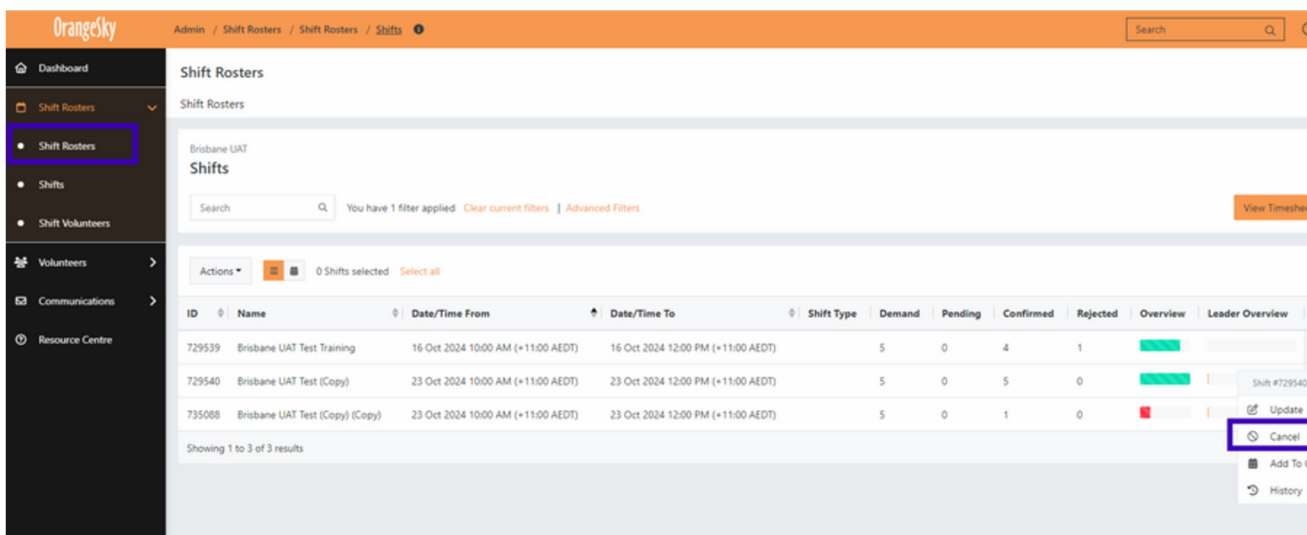
Shift Withdrawal

Volunteers can withdraw from a shift anytime up until 47hrs prior to the shift start time. You will not receive an alert when a volunteer withdraws, however, you can see via the roster in MyOS.

A volunteer cannot withdraw 47hrs prior to shift and will instead be prompted to contact their Team Leader to advise they cannot attend. This ensures that last minute changes aren't made without you being made aware and gives you time to update your roster.

Communicating with your team

MyOS does not replace WhatsApp as a communication tool. You can also refresh yourself on communicating with the team in this E-learning module.

New volunteer alerts

When a new volunteer joins your team, you will receive an automatic email to let you know. The email will contain the shift they will be joining, along with their contact information and a little bit about them.

Please get in touch to introduce yourself and to organise their first shift.

Shift Reports - Shift Leaders Only

Shift reports have been consolidated, so there will only be one shift report to complete. Shift reports will be completed by the Shift Leader, and accessed via their **MyOS** **Dashboard.**

Drivers will no longer need to complete a Shift Report; they'll only need to **check in** and **check out** of each shift.

As a shift leader, you'll be able to see an orange **Complete Shift Report** button next to the shift, as shown below.
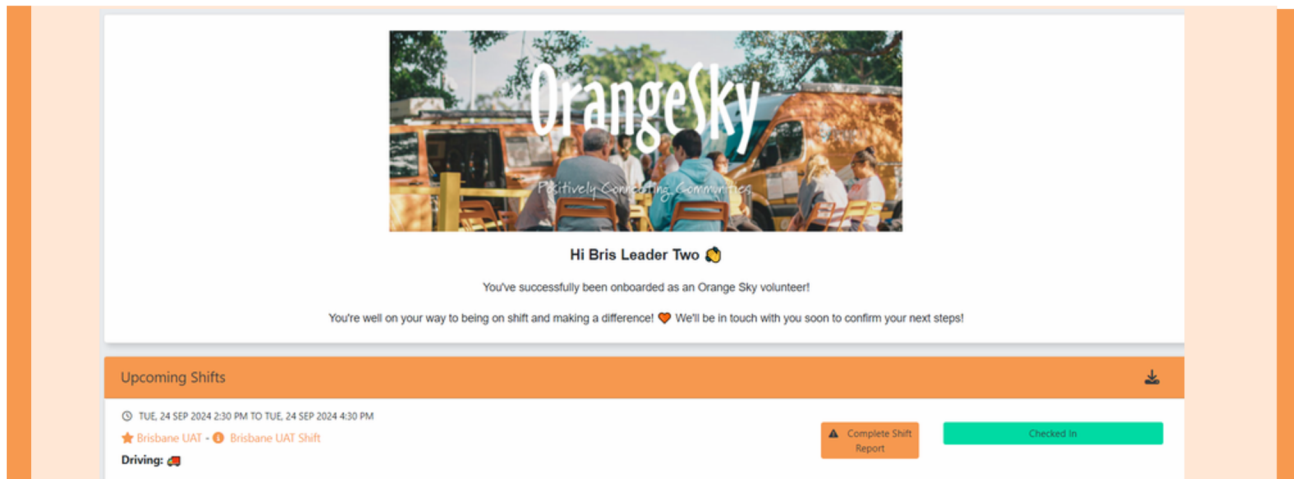
There are also resources on the **Resource Hub** for finding more details on completing a Shift Report.

MyOS SUPPORT

For further support on **MyOS**, you can access the Volunteer Resource Hub <u>here</u> to view **MyOS** Hub Resources.

MyOS Hub Resources are specially designed to support your transition, with a range of resources and support opportunities including:

- Learning Modules
- Training videos
- Submit a question
- Book in 1:1 support
- Log an issue
- Share an improvement

We encourage all volunteers to seek support from the resources in the **MyOS** Hub, and to reach out/book in 1:1 support if you're still struggling to access the resources you need.

MyOS is designed to simplify shift experience and streamline systems so you can focus on the important stuff - positively connecting communities.

Thank you for your continued commitment to friends doing it tough.

Need further support?

AU - 07 3067 5800
NZ - 9 801 6455

AU - volunteer@orangesky.org.au
NZ - volunteer@orangesky.org.nz