

Master Volunteer Processing Guide

A comprehensive operational reference for Volunteer Coordinators & Office Managers

1. Volunteer Basics & Classifications

All volunteers must receive explicit approval from the school site administrator before they are permitted to engage in any activities on campus. Requirements differ strictly by category classification:

- **Category A (One-Time/Supervised):** Requires individual site approval but does not require a formal application submission.
- **Categories B & C (Ongoing/Unsupervised):** Must submit a formal District Volunteer Application every school year for each individual campus they intend to support.

Volunteer Category Comparison Matrix

Category	Description	Typical Examples	Screening Requirements
Category A	Visitor or guest for a one-time event with no unsupervised interaction with students.	• Guest/Resource Speaker • Senior Exhibition Panelist • One-time classroom event help • Grandparent's Day events	• Administrator approval • Present valid ID at site • Sign in upon arrival • Wear name badge on-site
Category B	On-going, supervised classroom or office assistance.	• General classroom help • Office staff assistance • School Site Council • PTA/PTO (during school day)	• Submit District App • Megan's Law screening • Obtain TB clearance • Administrator approval • Present ID, sign in, & wear badge
Category C	Unsupervised student support or off-campus activities.	• Reading Pals program • Non-CUSD drivers (athletics/trips) • Off-site tutoring/mentoring • Overnight chaperones	• Submit District App • DOJ & FBI LiveScan • Obtain TB clearance • Mandated Reporter Training • Present ID, sign in, & wear badge

2. Basic Flow of the Application Approval Process:

1. Applicant fills out form
2. Office Staff reviews and approves (VC will ask volunteer for insurance page or driver's license if they didn't attach them)
 - a) ***Site adds TB results to application if you have previous records. ***
3. Principal reviews and approves
4. Site checks Megan's Law
5. System automatically sends email to volunteers to information on completing TB, LiveScan, and Mandated Reporter
6. DO confirms TB clearance, adds the form to the application and sends hard copies to site
7. DO confirms live scan clearance and adds to Volunteer Clearance spreadsheet.
8. DO confirms Mandated Reporter Completion and adds completion date to Volunteer Clearance spreadsheet.
9. System sends final review task to site where you can review it, add any additional drivers documentation to the form and hit submit so the application is archived into the Laserfiche storage system. At the moment you should be keeping a digital copy of application but I am working on changing that so you would not be required to if you do not want to.
10. Someone at site notifies parent/volunteer that they are cleared to be on campus for volunteer event/activity.

3. Laserfiche Processing Workflow

When a volunteer completes their online application, an email notification is automatically dispatched to the site's Volunteer Coordinator (VC), and Office Manager (OM). The VC/OM serves as the primary reviewer; the Principal acts as secondary approval.

1. **Step 1: Application Assignment:** Click the link in the notification email to launch Laserfiche. Locate the application in 'Unassigned Tasks' and select 'Assign to me' in the upper right corner.
2. **Initial Site Audit:** Review the form for accuracy and ensure the applicant filled out the correct category.
 - a. For Category B, ensure info is correct and complete the Megan's Law Check.
 - b. For Category C, check for accuracy, complete the Megan's Law Check and the attached driving verification documents if applicable.
 - c. If they indicate they are returning from a prior year, verify their previous TB and LiveScan clearances so you can log them in the 'Office Staff' tab.
 - i. Please ensure you are attaching the TB form if you have them in your office!

3. **Initial Approval:** In the Comments section, write a note such as: "Approval contingent on TB and Live Scan results" if necessary. Click Approve. This immediately routes the application to the Principal for secondary sign-off.
4. **Automated Clearance Dispatch:** Once the Principal approves, the system automatically emails the applicant custom instruction links for TB screening, Live Scan booking, and Mandated Reporter Training if applicable.
5. **Rejection:** If either you or the Principal reject the application please add notes in the "Notes/Reason for Rejection." Just be mindful that the information is included in the email to the volunteer letting them know that their application was rejected.
 - a. Please make sure that you are checking the new box "Volunteer Event/Purpose" in the "Volunteer Info" tab as some people are indicating that they would like to do fieldtrips/ off-campus events but have only filled out a Category B application. This would be the best time to reject the application and when you type the reason you can tell the volunteer why and request they re-submit the application.

4. Specific Clearance Protocols & Verification Steps

Megan's Law Screening (Categories B & C)

You must manually search the applicant's name and home address on the official registry:
<https://www.meganslaw.ca.gov/Disclaimer> This check is mandatory prior to final approval.

Tuberculosis (TB) Clearance (Categories B & C)

TB results are valid for 4 years from the completion date. Handle TB verification based on the applicant's status:

- **If TB is already on file from previous years:** **Attach the documentation under the "TB Clearance"** tab and toggle 'Yes' under 'TB Test Cleared?' in the "Office Staff" tab.
- **If they attach a valid external TB clearance:** Input the expiration date (4 years from completion) into the shared 'Volunteer Clearance' spreadsheet.
- **If they require testing:** The applicant will receive the scheduling link after the Principal approves. They will schedule a Risk Assessment Phone Call with a school nurse. Once completed, the District Office (DO) will inter-district mail you the hard-copy results.
 - I am hoping to do away with the hard-copies soon but for now please keep the hard copies that we are sending you.
- **To upload final TB results:** In Laserfiche, go to Completed Tasks, search for the application under 'Confirm/Upload Cleared TB Form', assign it to yourself, upload the PDF, and confirm 'Yes' in the form. File the paper copy in the site's physical Volunteer Binder.
 - I gave myself this task as it was the best place to also verify the Mandated Reporter Training.
 - *****I do still need you to upload previous TB records if they are still current.*****
 - I have been uploading all of the TBs that the school nurses complete and adding the expiration date to the Volunteer Clearance spreadsheet.

DOJ & FBI Live Scan Fingerprinting (Category C Only)

We only accept fingerprint results processed directly through the Chico Unified District Office. Once an applicant schedules and completes their appointment, monitor their clearance status on the shared 'Volunteer Clearance' Google Sheet.

Mandated Reporter Training (Category C Only)

Volunteers must complete Mandated Reporter Training each school year via the Keenan portal.

- **Tracking Note:** We had hoped to be able to give the sites access to view the certificates in Keenan to help streamline the process but ran into some tech problems with Keenan. The District Office is currently verifying the completion of the Mandated Reporter Training. Hopefully we can get you guys access next year!

- I am currently adding the completion date to the spreadsheet and attaching the document in the new "File Upload" area on the "Office Staff" tab.
- It is most helpful if the volunteer emails me when they have completed the training as I am prioritizing their clearance above the other applications.

Driving Verification (Category C - Staff/Select Volunteers)

- **Insurance Limits:** Confirm they uploaded a current declarations page meeting district requirements.
- **License Check:** Ensure the driver's license is fully valid, current, and unrestricted.
- **Compliance:** Verify that all submitted driving history answers align with District policy.
- **File Upload:** The high schools made me aware that often times you guys are receiving additional documentation later in the approval process as sometimes the Driver's License or Insurance coverage is close to expiring so I added a "File Upload" area where you can attach miscellaneous documents if you receive them after you did your initial approvals.

CRITICAL SYSTEM RULE: FINALIZING DECISIONS

- **Approve:** Submit final site approval in Laserfiche ONLY once all items (TB, Megan's Law, Live Scan, and Mandated Reporter Training) are verified. Once submitted, the system routes a final copy to the site, and you may contact the volunteer to welcome them to campus.
- **Reject (Warning):** A rejection cannot be reversed in the system. If you reject an application, the applicant will be forced to resubmit the form from scratch. Always confirm the necessity of a rejection before executing.