

# 4 – Placing a Prospective Volunteer in an On Hold Status



## Overview

The designated volunteer leader in your split-state is responsible for converting prospective volunteers to volunteers once they have passed their tests. However, if prospective volunteers find themselves in a position where they cannot volunteer during the upcoming tax season, then the appropriate volunteer leaders should update the prospective **volunteer assignment status** to *On Hold*.

## Topics:

- Update Volunteer Assignment Status
- Volunteer Assignment Status and Program Volunteer Status Relationship

## Update Volunteer Assignment Status

When volunteer leaders update a prospect's **Volunteer Assignment status** to *On Hold* the **Program Volunteer status** will automatically update to *Assignment Ended* with an **Assignment Ended Reason** of *On Hold*.

1. Scroll down to the **Volunteer Assignments** section on the volunteer's contact record, and click **Edit** next to the Tax-Aide prospective volunteer assignment.
2. Update the **Status** to *On Hold*.

| Volunteer Assignment Edit |                          | Save                     | Save & New   | Cancel |
|---------------------------|--------------------------|--------------------------|--------------|--------|
| <b>Information</b>        |                          | I = Required Information |              |        |
| Volunteer                 | Sophie Varn              | Status                   | On Hold      |        |
| Position                  | Prospective Volunteer    | Candidate Duration       |              |        |
| Assignment ID             | AS00490287               | No Match Reason          | -None-       |        |
| Interim Assignment        | <input type="checkbox"/> | Start Date               | [ 6/5/2017 ] |        |
| Local Title               |                          | End Date                 | [ 6/5/2017 ] |        |

3. Click the **Save** button.

Note: The **Active** checkbox – located in the **Volunteer Assignment** section - is automatically unchecked when the volunteer assignment status is *On Hold*.

### ***Volunteer Assignment Status and Program Volunteer Status Relationship***

The chart below shows the automatic update of the **Program Volunteer** status when the **Volunteer Assignment** status is updated to *On Hold*.

| When the Volunteer Assignment Status is... | The Program Volunteer Status will automatically update to... | The Assignment Ended Reason will automatically update to... |
|--|--|---|
| On Hold                                    | Assignment Ended   | On Hold   |

