



## Keeping Up with COVID Changes Webinar Notes

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### Contact Us

Your MSP license comes with unlimited support, and we're happy to help!

*From the Help menu:*

Send Data Files to Tech Support

[support@ministryschedulerpro.com](mailto:support@ministryschedulerpro.com)

(888) 622-0949

[View webinar recording](#)

[View COVID-related tips](#)

[COVID scheduling checklist](#)

[Adapting to COVID changes booklet](#)

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## Refresh your database

### Review inactive volunteers

Use the **Rosterizer** pane to export all inactive volunteers:

#### Included Volunteers:

1. Uncheck "Omit excluded volunteers" at the bottom
2. Choose "Include only volunteers that pass this filter"
3. In the Edit Filter window, set "Status" set to "Volunteer is inactive"
4. Click "OK"

**Included Fields:** uncheck "Show common fields only"

First name, Last name, Phone, Cell, Address, Email, Comments (if you use them to track why people were marked inactive), Ministry qualifications, Date created, Date modified, Last date used in a schedule

**Document Settings:** export as an Excel spreadsheet

Use an email **Announcement** to poll volunteers on their status

**Send to:**

- All volunteers
- “But only volunteers who pass this filter”: *Status* set to “Volunteer is inactive”
- Uncheck the “And only active volunteers” box

**Tokens:** Used to personalize emails to each volunteer

**Polls:** Used to gather volunteer feedback (click *View email* and then *Manage responses* to see individual replies

**Preview:** Click on the name of a volunteer in the preview to see exactly what they will see when they get the email

## Review contacts

**Ministry Leaders:** go to the *Web Terminal Settings* and click on *Ministry Leaders*

**Primary, Computer, and Billing contacts:** can be viewed and changed from the Licensing pane or the [License Login page](#)

**Installations:** can be viewed from “manage installations” in the [License Login page](#)

## Review Plus edition features

[Ministry Leaders](#)

[Sign-in Kiosk](#)

[Custom Fields](#)

Looking to upgrade? Email us for a quote.

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## Running your schedule (scheduling cycle)

### Review Service Times pane

1. Review yearly services
2. Review weekly services

How do I qualify volunteers for a new service?

- Volunteers can add it to their profile when you email for updates
- You can add it to all (or some) volunteers by selecting multiple volunteers in the **Volunteers** pane (holding the SHIFT or CTRL key on your keyboard) and then click “Edit Volunteer” to edit multiple volunteers at once

Different summer schedule? Edit the services you don't need and check “Make this service inactive for now (do not schedule)”

What if my service times change in the middle of a schedule?

1. Create two separate schedules - one for each scheduling model OR
2. Create a schedule with both services on every weekend and then delete those you do not need OR
3. Create a schedule for the service that is most used and manually add the others after the schedule is created

## **Request updates to availability**

From the **Announcements** pane:

1. Choose Use Template - Preconfigured
2. Choose “Request for updates to availability”
3. Edit to add any personalized text
4. Preview and send

## **Create and fill your schedule**

Patti's frustration free quarterly scheduling:

Feb-Apr: includes Ash Weds and Easter every year

May-July: provides a good transition into summer

Aug-Oct: start of new school/ministry year

Nov-Jan: covers all holidays and no need to create a new schedule mid-Dec

To delete a service, go to the **Schedule** menu and choose “Delete Service.”

To add a service:

1. Click on the date where the service is needed
2. Click “New Service”
3. Enter in the correct time, description, and number of volunteers needed

4. Use the “Treat As” field to choose which service preferences MSP should use for this service

You can also copy (CTRL+C) and paste (CTRL+V) a service from one date to another, but be sure to update the “Treat as”!

## Send “Schedule Finalized” email

First, we need to save the schedule from the **File** menu, make it Live and create our Live Schedule Post. Cloning Live Schedule Post settings means we apply the exact same formatting to the new schedule(s). This is great if you have customized one or more Live Schedule Posts previously.

Creating a new Live Schedule Post for only unfilled positions

1. From within the Live schedule, go to **File** and choose “Create additional Live Schedule Post”
2. Optional: choose the Live Schedule Post layout. We recommend List of services or Interactive Calendar for this situation
3. In the *Included Volunteers* section, choose “Include only these volunteers” and then choose “Select none”
4. Click “Save” and give it a name
5. To view: click on the **Web Terminal** pane, click on the *Full Schedules* tab, choose the Live Schedule Post, and click “View”

Emailing volunteers from the **Announcements** pane:

1. Choose Use Template - Preconfigured
2. Choose “Schedule finalized”
3. To add the token for the Live Schedule Post: click on the Token button on the right, go to Live Schedule Post links, and choose the unfilled positions post
4. Preview and send

## Reminders and subs

1. Go to the **Web Terminal** pane and click “Web Terminal Settings”
2. Click on **Auto Reminders** and check to make sure settings are correct
3. Click on *Available Positions* and check to make sure settings are correct