The Commonwealth of Kentucky

Release 4

Business Connect

BusinessConnect.ky.gov

Quick Reference Guide

Managing Opportunities

Kentucky HEALTH Release 4 Business Connect Quick Reference Guide: Managing Opportunities

This Quick Reference Guide is designed to help the Business Partner create and host Opportunities for individuals through Business Connect and help them get HEALTH Benefits.

Table of Contents

Opportunity Management

Opportunities Overview

Opportunities are the community service events and other activities posted by State approved Business Partners in Business Connect for citizens. Business Partners may host these Opportunities within Kentucky, allowing Kentucky Citizens to volunteer for these Opportunities and assist in earning their required hours for benefits.

The Business Partners help the individuals in the following manner:

- Hosting multiple opportunities having multiple time slots
- Defining the organizations roles and their nature of work
- Earn CE hours to maintain their Kentucky HEALTH benefits

Opportunity Types

Opportunity Types Overview

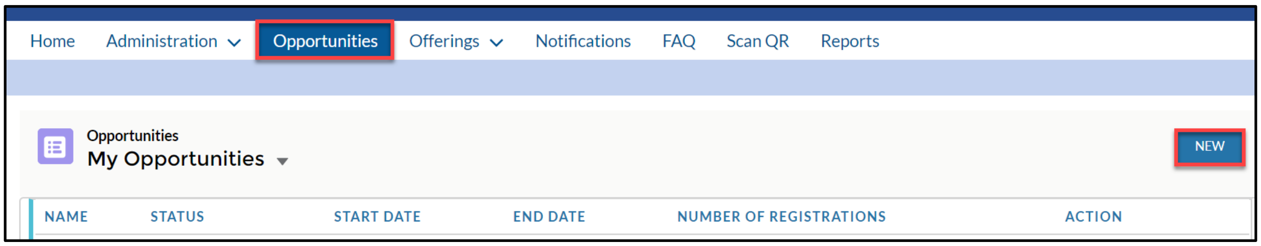
Business Partners create Opportunities that offer hours to individuals to maintain their Kentucky Health benefits. Business Partners create different types of Opportunities based on their organization type.

Creating an Opportunity: Opportunity Details

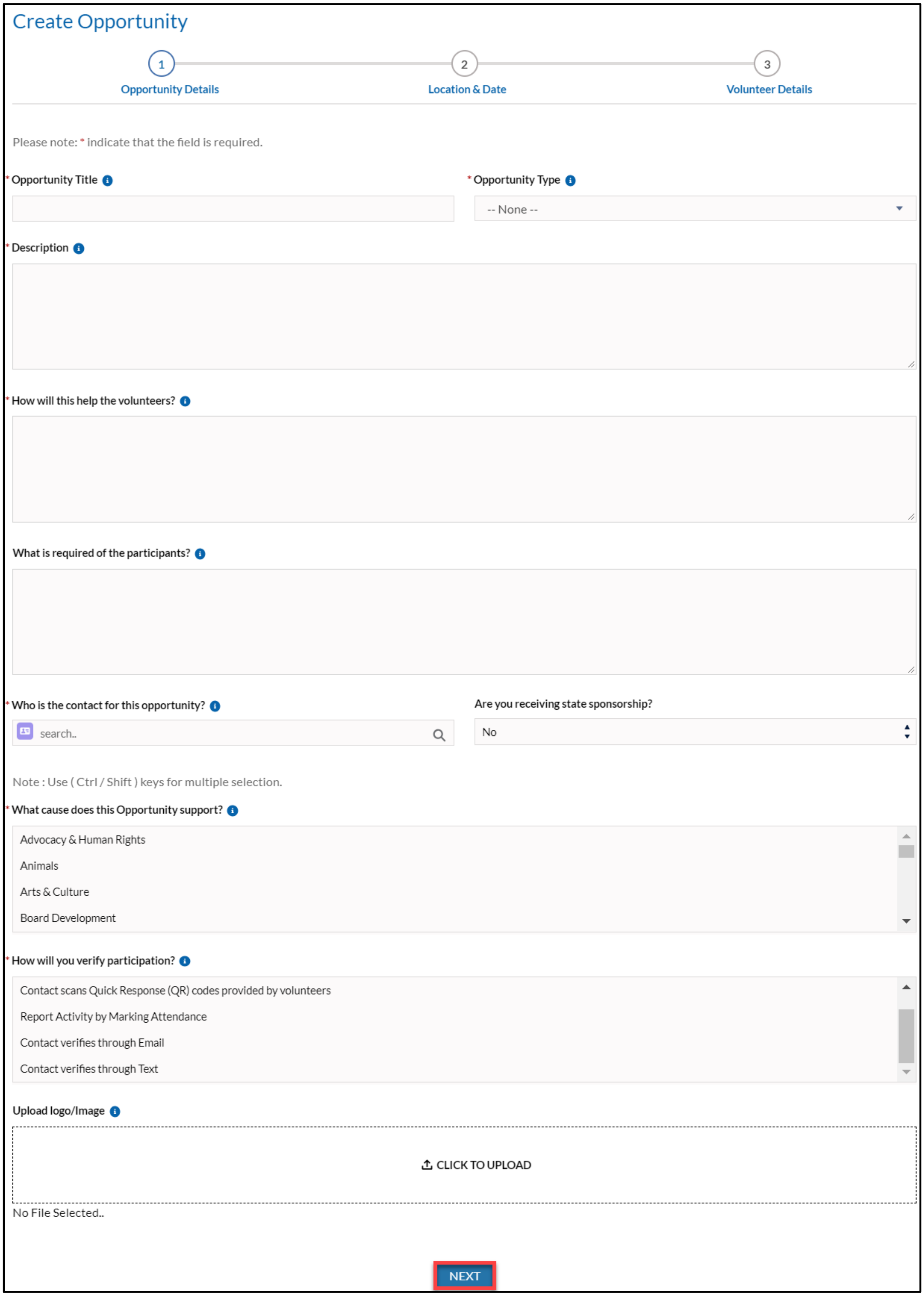
Opportunities are created in Business Connect by a contat or an admin. When creating an opportunity, the information entered may have a different format based on the type of Business Partner.

Follow the steps below to **create** an Opportunity:

1) Select **"Log In"** and enter credentials
2) Select **"Opportunities"** from the Business Connect *Home Dashboard*
3) Select **"New"** to arrive at the first section of the *Create Opportunity* screen



4) Enter a title in the *Opportunity Title* field
5) Select *an opportunity type from* drop-down
6) Enter the description in the *Description* field
7) Enter a response for *How will this help the volunteers?* field
8) Enter a contact for *Who will be the contact for this opportunity?* field
9) Select a response from the *Are you receiving sponsorship from the State for this Opportunity?* field *(Default to No)*
10) Select a response for *What causes does this Opportunity support?*
11) Select a response for *How do you want to verify volunteers participation?*
12) Select **"Next"** to navigate to the Location Details for the Opportunity Details



Create Opportunity

1 Opportunity Details
2 Location & Date
3 Volunteer Details

Please note: * indicate that the field is required.

* Opportunity Title
* Opportunity Type
-- None --

* Description

* How will this help the volunteers?

What is required of the participants?

* Who is the contact for this opportunity?
search..

Are you receiving state sponsorship?
No

Note : Use (Ctrl / Shift) keys for multiple selection.

* What cause does this Opportunity support?
Advocacy & Human Rights
Animals
Arts & Culture
Board Development

* How will you verify participation?
Contact scans Quick Response (QR) codes provided by volunteers
Report Activity by Marking Attendance
Contact verifies through Email
Contact verifies through Text

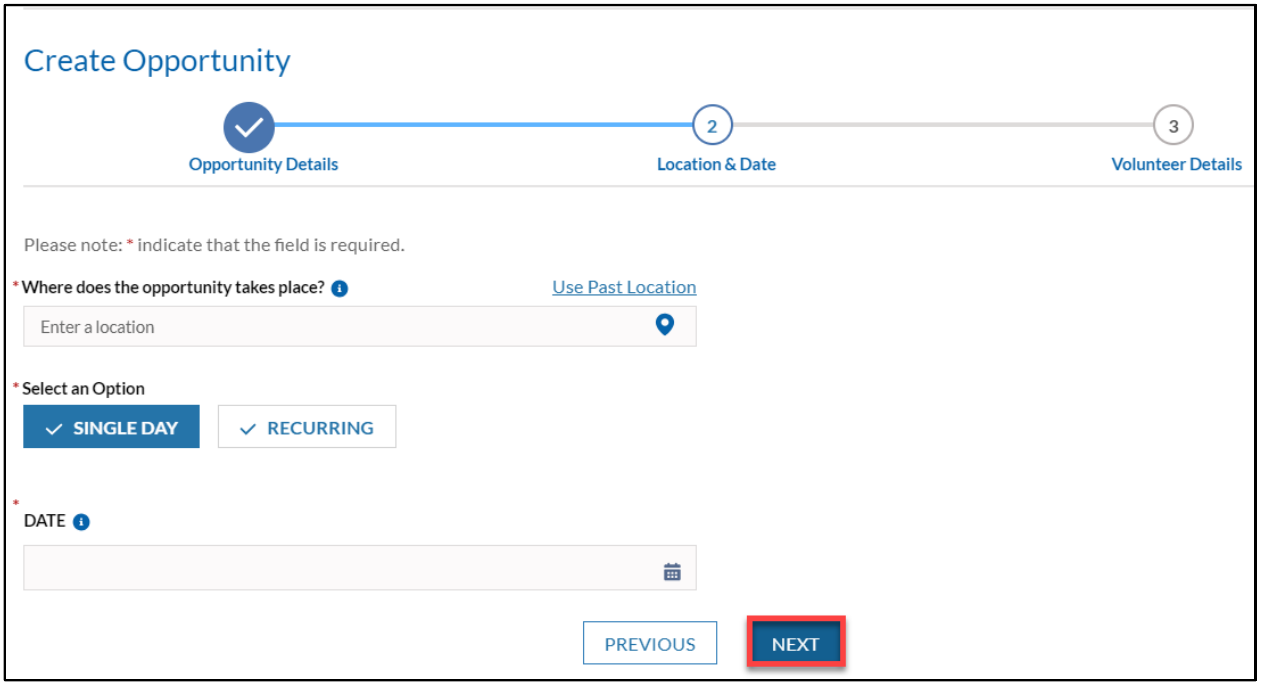
Upload logo/Image
CLICK TO UPLOAD
No File Selected..

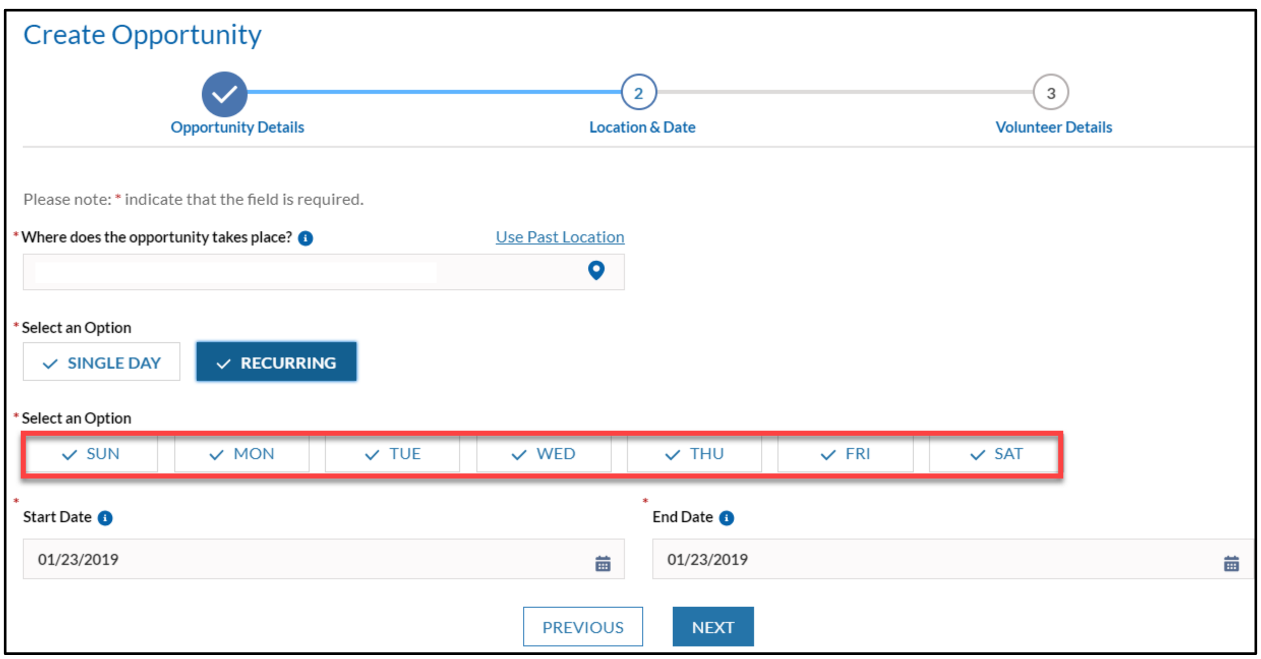
NEXT

Creating an Opportunity: Location & Date

The Location & Date details are on the second screen of the Opportunity Details page. ETPL providers are able to create opportunities for more than one day, so their page would look different from the organizations that are soley Community Engagement or SNAP 50/50, which have just single day opportunities.

The Opportunity can be either “Single Day” or “Recurring.”





These *Organization Types* allow the Opportunities to exist for **more** than one day. Thus, the start and end dates are different.
Any other *Organization Type* wouldn't let the start and end dates be different. They get over on the same day.

Use the steps below to enter the *Location & Date* details for the Opportunity Details*:*

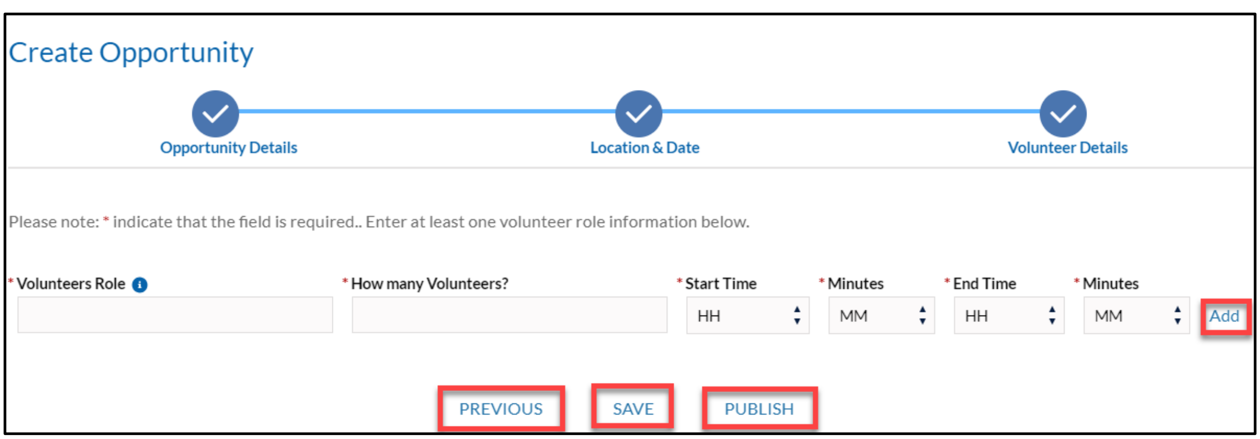
1) Select **"New"** on the opportunity home screen
2) Enter an address for *where the opportunity takes place*
3) Enter a *start date* and *end date*
4) Select **"Next"** to be navigated to the Volunteer Details

Creating an Opportunity: Volunteer Details

The third portion of creating an Opportunity is the Volunteer details. The User mayo enter the Volunteer details and publish the Opportunity directly from this page.

Use the steps below to enter the *Volunteer Details:*

1) Enter a role in the *Volunteer Role* field
2) Enter the number of volunteers in the *How many Volunteers?* field
3) Select the *Start Time* from the minutes and hours fields
4) Select the *End Time* from the minutes and hours fields
5) Select **"Add"** to *Add* a time slot
6) Select **"Delete"** to *Delete* a time slot
7) Select **"Save"**
8) Select **"Publish"** when it is enabled. The user is navigated to the *Opportunity Detail View* screen
    - By selecting **"Publish"** one time slot for an opportunity has been created and saved

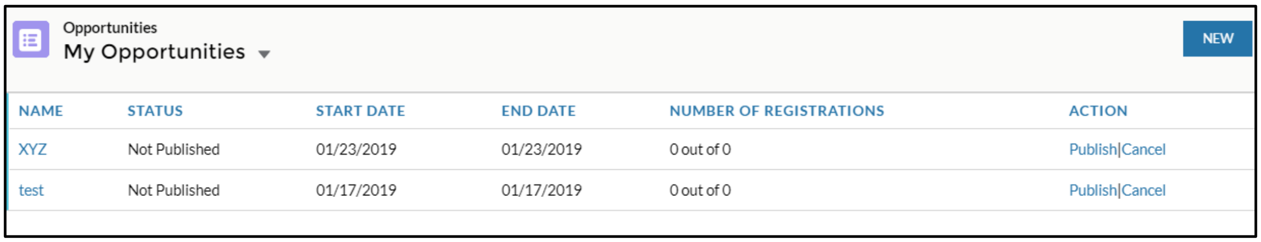


View Opportunity Details

This screen displays all the *Opportunity Details* for the Business Partners in Business Connect.

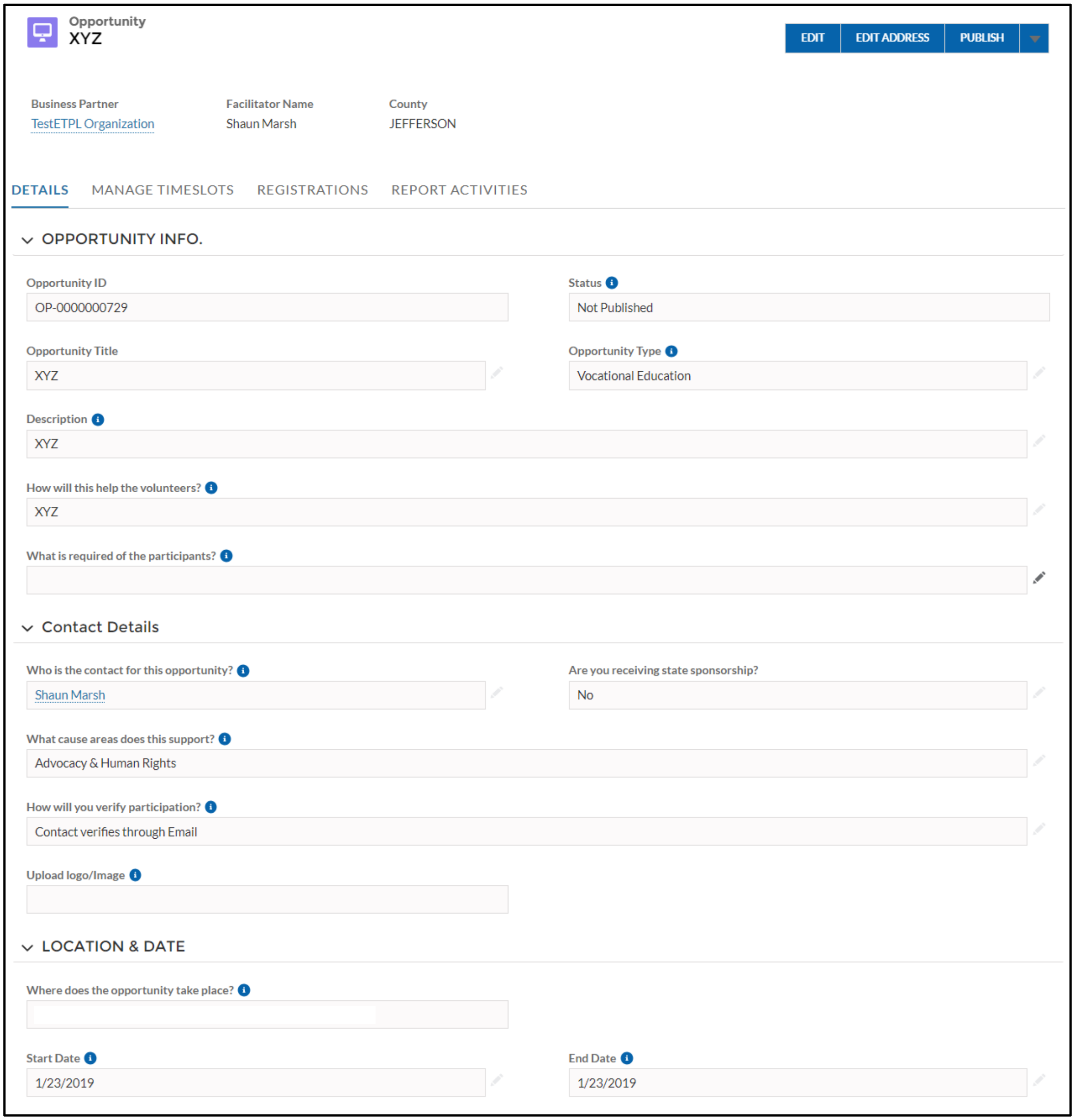
Use the steps below to *View the Opportunity Details:*

1) The Business Partner is able to view a list of all opporunities at the *Opportunity Detail View* screen



NAME	STATUS	START DATE	END DATE	NUMBER OF REGISTRATIONS	ACTION
XYZ	Not Published	01/23/2019	01/23/2019	0 out of 0	Publish|Cancel
test	Not Published	01/17/2019	01/17/2019	0 out of 0	Publish|Cancel

2) Select on a specified opportunity's hyperlink to view its **"Details"**
3) This screen allows users to view details of an existing Opportunity. The above screenshot shows the example of an Opportunity that has not been published. The User has following options:
   - Edit
   - Edit Address
   - Cancel Opportunity
   - Clone
4) The *View Opportunity* screen displays the tabs to *Manage Time Slots* and *Registrations* for the Opportunity


Opportunity
XYZ
EDIT
EDIT ADDRESS
PUBLISH
Business Partner
TestETPL Organization
Facilitator Name
Shaun Marsh
County
JEFFERSON
DETAILS
MANAGE TIMESLOTS
REGISTRATIONS
REPORT ACTIVITIES
OPPORTUNITY INFO.
Opportunity ID
OP-0000000729
Status
Not Published
Opportunity Title
XYZ
Opportunity Type
Vocational Education
Description
XYZ
How will this help the volunteers?
XYZ
What is required of the participants?
Contact Details
Who is the contact for this opportunity?
Shaun Marsh
Are you receiving state sponsorship?
No
What cause areas does this support?
Advocacy & Human Rights
How will you verify participation?
Contact verifies through Email
Upload logo/Image
LOCATION & DATE
Where does the opportunity take place?
Start Date
1/23/2019
End Date
1/23/2019

Opportunity Details: Managing Time Slots

Timeslots define the volunteer role, start time, end time and number of volunteers required for each specific role in an opportunity. Individuals can register for timeslots to participate in Citizen Connect once the timeslot is published in Business Connect.

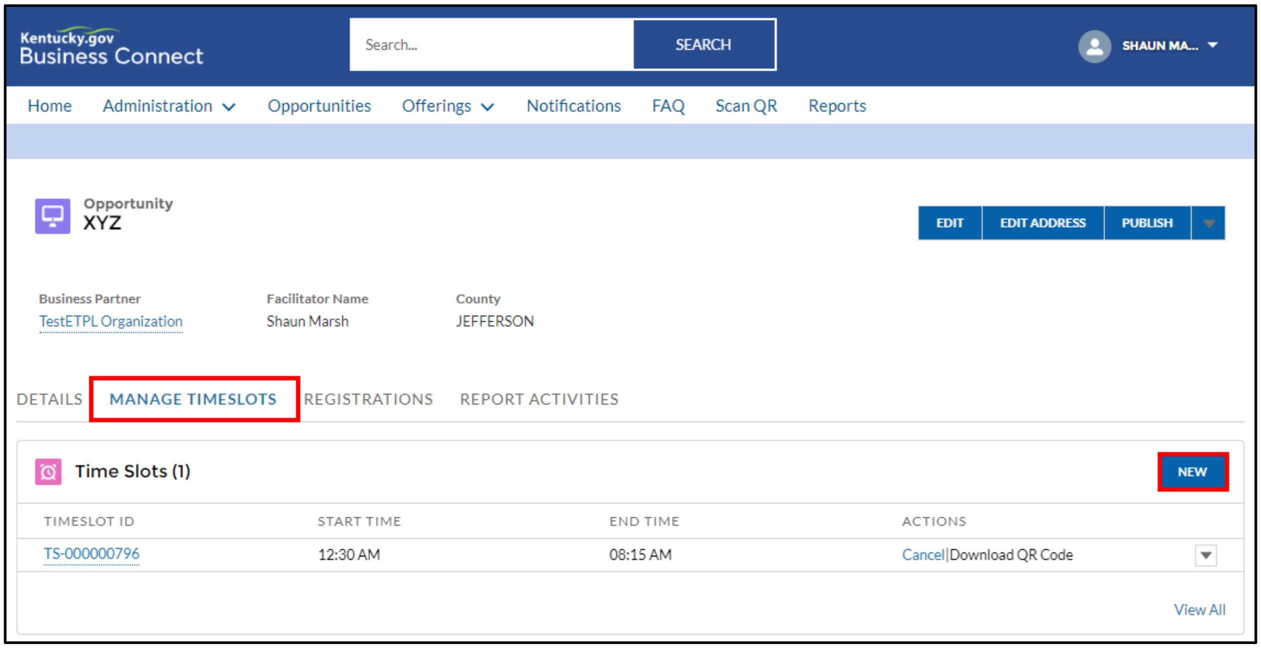
- Each opportunity can have multiple timeslots.
- The Volunteer Role defines the nature of the work the individual is required to perform for a specific opportunity timeslot.

Example: A local non-profit has created an opportunity every Saturday that provides free meals to the local homeless population. The opportunity has several different volunteer roles such as Cooking, Serving, and Cleaning. A separate timeslot must be created for each of these specific roles in the opportunity.

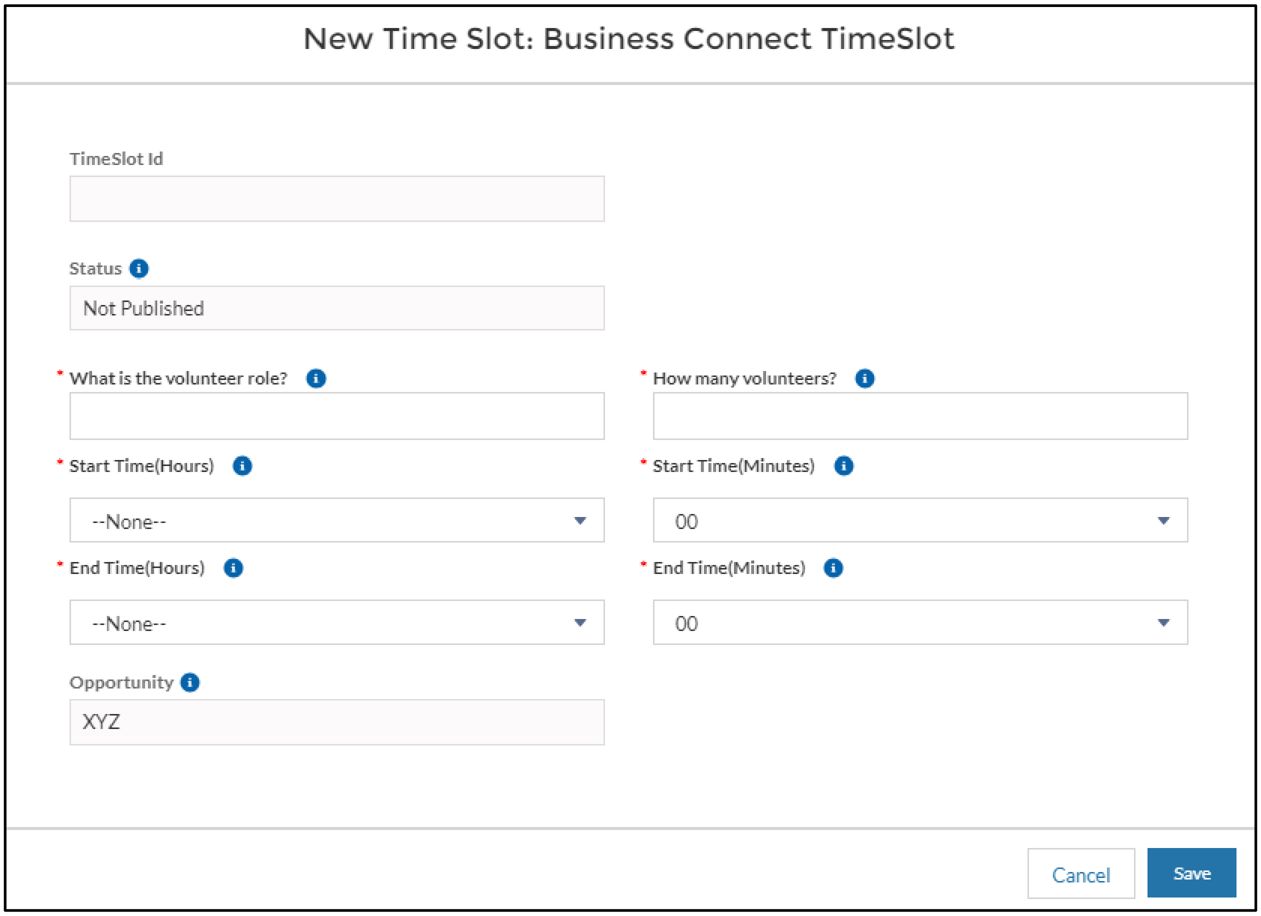
The *Managing Time Slots* screen allows Contacts to view the list of existing time slots related to an Opportunity.

Use the steps below to *Manage the Time Slots*:

1) Select **"Manage Time Slots"** from the Opportunity details screen
2) Fields that are displayed on the *list view* include:
    - Time Slot ID
    - Title
    - Role
    - Openings
    - Hours
    - Start Time
    - End Time
    - Status
    - Number of available Time Slots and actions
3) The system provides following actions that are performed on a selected Time Slot:
    - Edit
    - Edit Address
    - Cancel
    - Publish
    - Download QR code
4) The user can select "New" to begin the process of creating a new timeslot



5) Enter the following information on the "New Time Slot" pop up:
   a. What is the volunteer role?
   b. How many volunteers?
   c. Start Time (Hours)
   d. Start Time (Minutes)
   e. End Time (Hours)
   f. End Time (Minutes)
   g. Opportunity Name



6) Select "Save" to save the new opportunity time slot

Opportunity Details: Registrations

Registration occurs when Individuals register for opportunity timeslots in Citizen Connect, or when the Business Partner Contact creates a new registration for an individual to participate in an opportunity timeslot in Business Connect. Business Partner Contacts are able to view the registrations in Business Connect and verify individual participation.

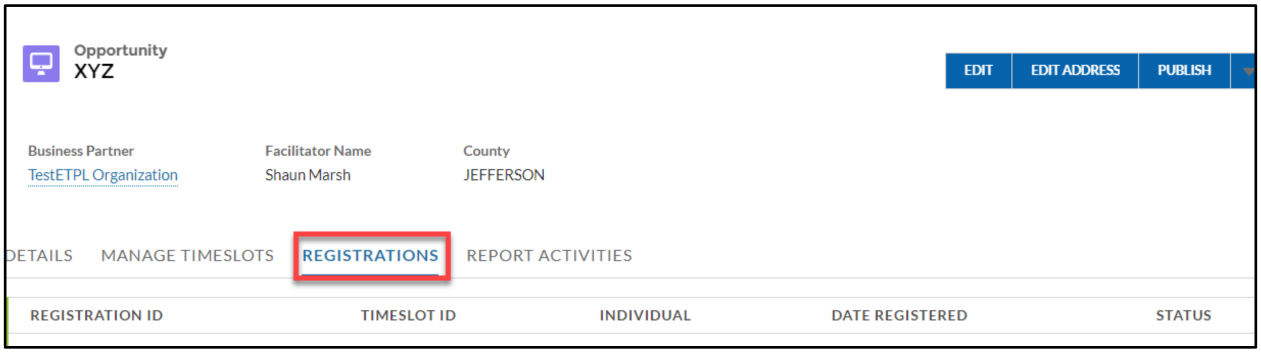
- Business Partner Contacts can only create registrations for published timeslots

The Opportunity Registration details screen is displayed on the *Opportunity Details* screen under the *Registrations* subtab. All registrations associated to an Opportunity are to view in the registrations list.

Use the steps below to create a *Registerion within an Opportunity:*

1) Select the **"Registrations"** subtab
2) The following fields are available for each *Single Day Opportunities* registration:

- Time Slot Name
- Individual Name
- Date Registered
- Reported Hours
- Status



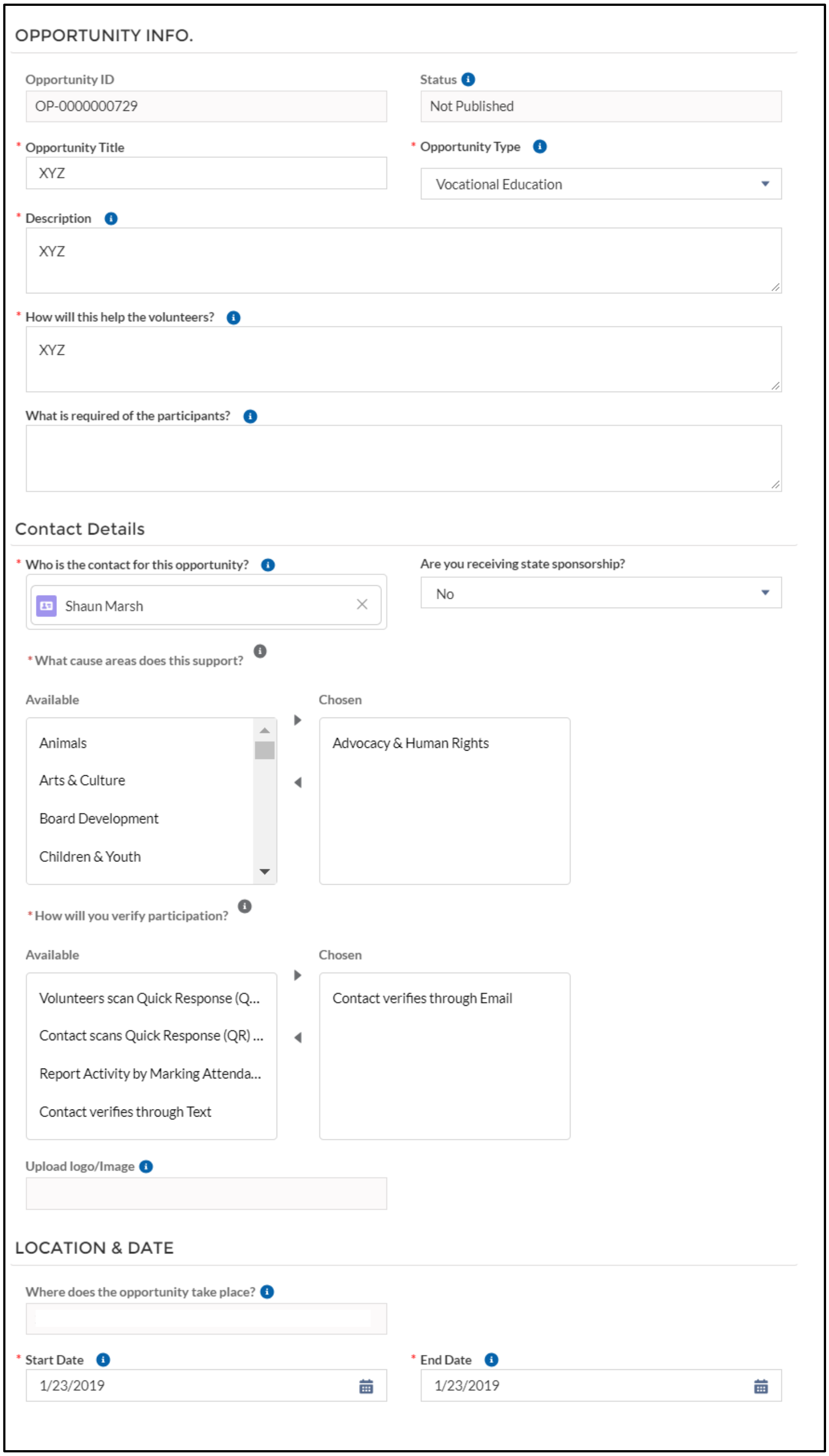
3) The following fields are available for each *Multiple Day Opportunities* registration:
    - Time Slot Name
    - Individual Name
    - Date Registered
    - Reported Hours
    - Status
    - Start Date
    - End Date

Editing Opportunity Details

The editing Opportunity details screen is displayed when the User selects **"Edit"** on the Opportunity Registration homescreen. This screen allows Contacts to make updates to an existing Opportunity.

Use the steps below to **edit** an Opportunity*:*

1) Select **"Edit"** on the Opportunity details screen
2) Edit the Opportunity title in the *Opportunity Title* field
3) Edit the Opportunity type from the *Opportunity Type* drop-down
4) Edit the description in the *Description* field
5) Edit a reason for *How will this help the volunteers?* field
6) Enter a contact name for *Who will be the contact for this opportunity?* field
7) Edit the reason for *How do you want to verify volunteers participation?*
8) Edit the *Location & Date* fields
9) Select **"Save"**
10) The User will be navigated to the Opportunity details screen



OPPORTUNITY INFO.

Opportunity ID
OP-0000000729

Status
Not Published

* Opportunity Title
XYZ

* Opportunity Type
Vocational Education

* Description
XYZ

* How will this help the volunteers?
XYZ

What is required of the participants?

Contact Details

* Who is the contact for this opportunity?
Shaun Marsh

Are you receiving state sponsorship?
No

* What cause areas does this support?

Available	Chosen
Animals	Advocacy & Human Rights
Arts & Culture	
Board Development	
Children & Youth	

* How will you verify participation?

Available	Chosen
Volunteers scan Quick Response (Q...	Contact verifies through Email
Contact scans Quick Response (QR) ...	
Report Activity by Marking Attenda...	
Contact verifies through Text	

Upload logo/Image

LOCATION & DATE

Where does the opportunity take place?

* Start Date
1/23/2019

* End Date
1/23/2019