Canvass Manager: Adding Assignments

1. Step 1: In order for you to be able to add assignments, you must first send me a list of approved lost-timers and their Local. If a volunteer is collecting cards, send their name and local to csims@cwa-union.org.

2. Step 2: Once you’ve logged in, you will select the Canvass Manager tab.

3. Step 3: Click the assignments link for the state you wish to enter data for.

4. Step 4: Click New Assignment Tab (Top Right Corner)
   ** If you have already created an assignment for a lost-timer, you will select the pencil next to the name that you would like to add additional data for.

5. Step 5: Fill in all fields.
   ***Best Practices: If you know a lost-timer will be working for an extended period of time, select a greater date range for the Assignment Start date to the Assignment End date. These fields can always be changed.

* You will need to get the lost-timers pay rate from your state coordinator. If it is a volunteer, the pay rate would be $0.00
Step 6: Select the day(s) that you will be entering in the data.

Step 7: Click Save

Step 8: Once you have entered in the information and selected the reporting day and have pressed save, you will be redirected to the assignment profile. You must select the CREATE/UPDATE ASSIGNMENT DAYS (left) in

Step 9: Once you've clicked the Create/Update Assignment days, a list of the days between the assignment start and end date will be populated. To edit, simply click the pencil next to the appropriate day to enter in the information.

Step 10: After clicking the pencil to edit, you will be prompted to enter in the information for the assignment. Hours Worked PAF Cards Collected Total Revenue Collected (If a card is filled out for $5.00 and they are paid bi-weekly, it would be $10 dollars. Revenue collected is monthly total.

Step 11: Click Save.

Once you have saved it, the state and local data information will automatically update.
Current Revenue Goal: Revenue goals for the state are determined by 3% of Active members in the state at $10 per PAF card collected.

Current PAF Contributors Goals: Contributor goals are determined by 3% of Active members in the state and broken up by 3% of Active members for the Local breakdown.

Current Volunteer Pledge Card Goal: Volunteer pledge card goals are determined by 5% of active membership in the state.

Current YTD Benchmark: Revenue/PAF/Pledge Cards: The benchmarks are determined by spreading out the goals for the 12 month total and is computed by the current date and where a state or Local should be if they were collecting cards on a rolling basis.

Current PAF Revenue/To Date/Pledge Cards: This is what has been entered into PoliOps to date for your state.

On Track/Off Track Indicators: The on track/off track color-coded bars are to represent whether or not a state or Local is on track if they were collecting cards on a rolling basis. The system takes current cards/revenue collected and compares it to the benchmark goal and determines whether or not a state or Local is On Track/Slightly Off Track/ or Off Track based upon the distributed goals.

Below is state broken down by Local. The Goals, Benchmarks, and Current Totals are calculated the same way as the state summary.