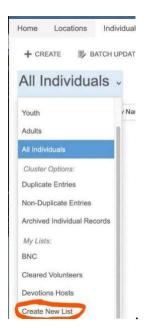# Creating a Cleared Volunteers List in SRP

Clearance information is stored as the first entry in the Comment field for individuals who have been cleared. This clearance information should always be kept as the beginning entry of the Comment field, and these entries are updated by the Training Institute.

The format for the clearance entry includes these hashtags:
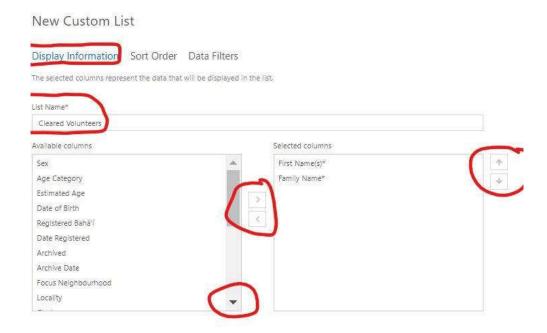For example: #BGC MVR-08/17/26; #CT-08/12/27; #MRIL-08/17/27;

- #BGC-mm/dd/yy, which is basic clearance without motor vehicle clearance or,
- #BGC MVR-mm/dd/yy, which is both basic and motor vehicle clearance;
- the date being the **expiration date of the clearance**.
- #CT-mm/dd/yy, Clearance Training followed by the expiration date.
- #MRIL-mm/dd/yy, Mandated Reporting training for a particular state, in this instance IL, followed by the expiration date. The Mandated Reporting hashtags for WI and MN would be #MRWI and #MRMN respectively.

In order to see your list of Cleared Volunteers, you will need to create a Cleared Volunteers List in SRP. Look at the Tab Bar across the top and click on **Individuals**. Click the drop down menu beside **All Individuals** and you will see:

You will also notice that any lists you have previously created are available above **Create New List** and below **My Lists**.
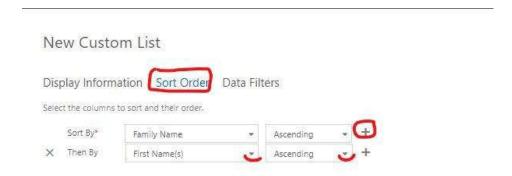
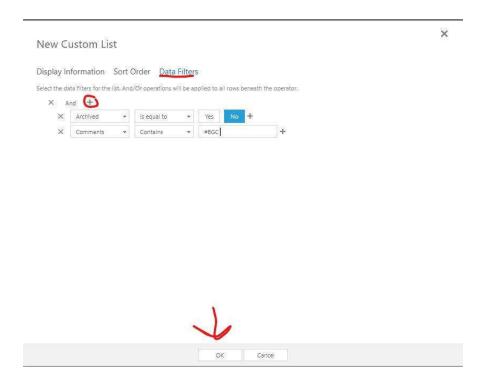Click on **Create New List**, you will be shown the following screen.

Under **New Custom List**, it shows 3 tabs that you will use: Display Information, Sort Order and Data Filters. It starts in **Display Information**. You would write the name of the List in the Rectangle under **List Name**. Please title this list as Cleared Volunteers. There is a list under **Available columns**. The list is much longer than what can be seen initially. Just scroll down to see what other items are available. You can change the order of the columns by selecting an item under the **Selected columns** and using the up and down arrows to change its position.

We only used first name and family name, which is the default. You can add whatever you want from the left column to the right column to appear in your List. This can easily be changed at any time.
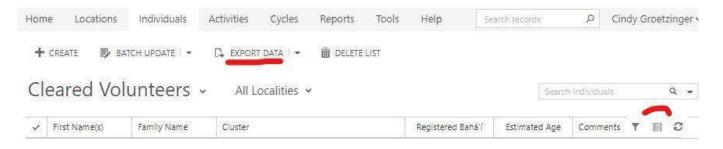
Under the **Sort Order** Tab, the default is just First Name, but you can add whatever other Columns you may want. The options are Ascending or Descending.

Under the **Data Filters** tab, click on the + circled to add as many data filters as you want. For the Cleared Volunteers List, use **Archived** is equal to NO and **Comments** Contains #BGC. This will generate a List with all of your cleared volunteers. When you have finished making your choices, hit OK at the bottom.

After you create the List, it can be seen listed under Individuals, Drop Down Menu. Just click on the Name of the List to open it. If you ever want to add or delete items or change the List in any way, look to the far right of the screen and you will see a square (under the red curved line) that can be clicked to show you the options you have chosen and allow you to make changes.

Above the title of the List, you can see that you can export the data to an excel spreadsheet. Below the tile, it shows the Available Columns chosen and below that, it shows your data. We use First Name, Family Name, Cluster, Registered Bahá'í, Estimated Age and Comments. The order of the fields on the page can be changed in the 'Display Information' of your custom list.