

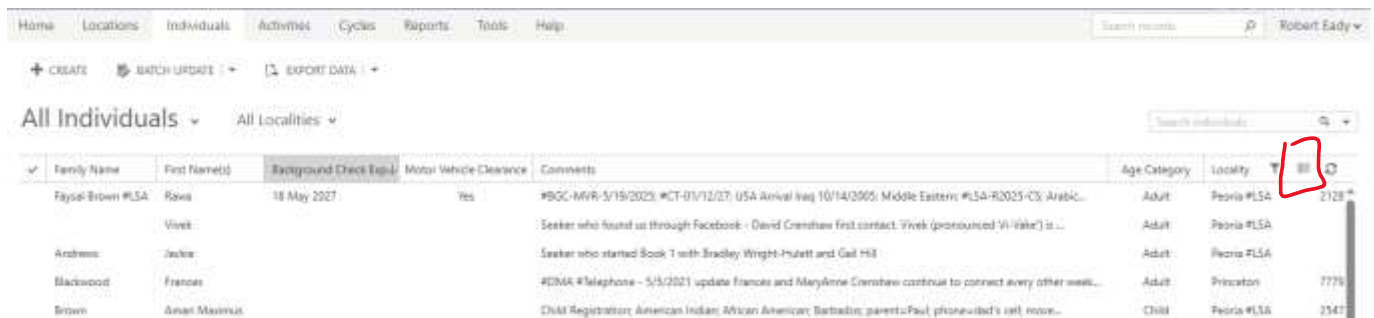
Finding Cleared Volunteers in SRP (Version 10/25/2025)

[Hashtag format link](#)

[Create a custom list link](#)

The Background Check and Motor Vehicle Clearance information are stored in separate fields in an individual's record. The Background Check shows the expiration date. Go to an individual record to see this information.

To see these two fields on the displayed screen without scrolling to the right, the field display order may need to be changed. To change the fields displayed, click on the 'table' key, circled in red, to make this change.



Family Name	First Name(s)	Background Check Exp.	Motor Vehicle Clearance	Comments	Age Category	Locality	Table Icon
Fayal Brown #LSA	Rana	18 May 2027	Yes	#BGC-MVR-5/19/2025; #CT-01/12/27; USA Arrival bag 10/14/2005; Middle Eastern; #LSA-R2025-C3; Arabic...	Adult	Peoria #LSA	2128*
	Vivek			Seeker who found us through Facebook - David Crenshaw first contact. Vivek (pronounced Vi Vite) is...	Adult	Peoria #LSA	
Andrew	Jacira			Seeker who started Book 1 with Bradley Wright-Pulatt and Gail Hill	Adult	Peoria #LSA	
Blackwood	Frances			#CDAR #Telephone - 5/5/2021 update Frances and Marylinne Crenshaw continue to connect every other week...	Adult	Princeton	7779
Brown	Arant Maximus			Child Registration; American Indian; African American; Barbadian; parent=Paul (phone=dad's cell) room...	Child	Peoria #LSA	2547

Other Clearance information is stored as the first entry in the Comment field for an individual. In the example given above, note that the first individual in the list has Clearance Training but no Mandated Reporter training.

This clearance information should always be kept as the beginning entry of the Comment field, and these entries are only updated by the Training Institute.

A custom list is needed in order to find an individual's information in the comment field. How to create a custom list follows the Hashtag format information below.

Hashtag format:

The format for the clearance entry includes these hashtags: #CT-08/12/27; #MRIL-08/17/27; Previously, the basic clearance information was also stored in the comment field as: #BGC MVR-08/17/26; The basic clearance hashtag may still be present in the comment field and will be removed when the clearance for the individual is updated or renewed.

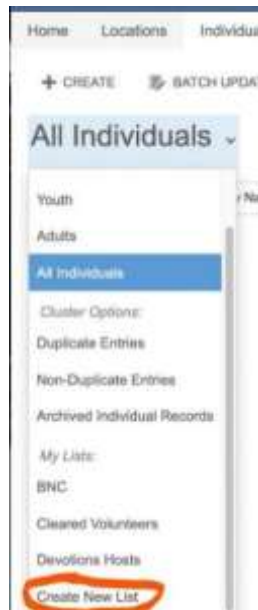
- #BGC-mm/dd/yy, which is basic clearance without motor vehicle clearance or,
- #BGC MVR-mm/dd/yy, which is both basic and motor vehicle clearance;
- **Expiration Date of the clearance is the date recorded.**

- #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.

Note that the clearance list can also be exported from SRP to an Excel workbook.

How to create a custom list

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.

New Custom List

Display Information Sort Order Data Filters

The selected columns represent the data that will be displayed in the list.

List Name*

Cleared Volunteers

Available columns

- Sex
- Age Category
- Estimated Age
- Date of Birth
- Registered Bahá'í
- Date Registered
- Archived
- Archive Date
- Focus Neighbourhood
- Locality

Selected columns

- First Name(s)*
- Family Name*

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.

New Custom List

Display Information Sort Order Data Filters

Select the columns to sort and their order.

Sort By*

Family Name

Ascending

+

× Then By

First Name(s)

Ascending

+

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.

New Custom List

Display Information Sort Order **Data Filters**

Select the data filters for the list. And/OR operations will be applied to all rows beneath the operation.

X And +

X Archived is equal to NO +

X Comments Contains #BGC +

OK Cancel

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.

Home Locations Individuals Activities Cycles Reports Tools Help Search records Cindy Groetzinger

+ CREATE BATCH UPDATE EXPORT DATA DELETE LIST

Cleared Volunteers All Localities Search individuals

✓	First Name(s)	Family Name	Cluster	Registered Bahá'í	Estimated Age	Comments

Above the title of the List, you can see that you can export the data to an excel spreadsheet. Below the title, 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.