

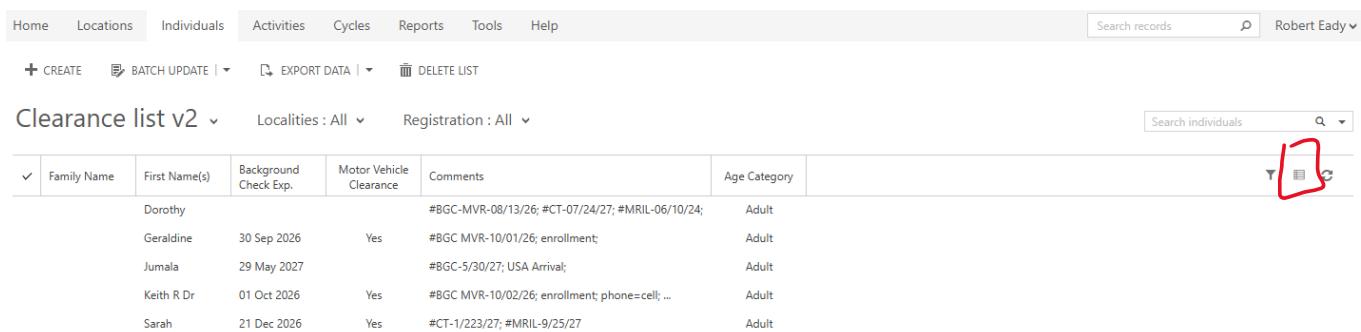
Finding Cleared Volunteers in SRP (Version 12/5/2025)

[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's 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 to mirror the fields in the screenshot of the report below, click on the 'table' key, circled in red, to make this change.



The screenshot shows a software interface for managing individuals. At the top, there are tabs for Home, Locations, Individuals (which is selected), Activities, Cycles, Reports, Tools, and Help. Below the tabs are buttons for CREATE, BATCH UPDATE, EXPORT DATA, and DELETE LIST. The main area is titled 'Clearance list v2' with dropdowns for Localities: All and Registration: All. A search bar for individuals is at the top right. The table below lists individuals with columns for Family Name, First Name(s), Background Check Exp., Motor Vehicle Clearance, Comments, and Age Category. The 'Comments' column for Dorothy contains the text '#BGC-MVR-08/13/26; #CT-07/24/27; #MRIL-06/10/24;'. The 'table' key icon, represented by a red circle with a white 'T', is located in the top right corner of the table header.

✓	Family Name	First Name(s)	Background Check Exp.	Motor Vehicle Clearance	Comments	Age Category	
	Dorothy				#BGC-MVR-08/13/26; #CT-07/24/27; #MRIL-06/10/24;	Adult	
	Geraldine	30 Sep 2026	Yes		#BGC MVR-10/01/26; enrollment;	Adult	
	Jumala	29 May 2027			#BGC-5/30/27; USA Arrival;	Adult	
	Keith R Dr	01 Oct 2026	Yes		#BGC MVR-10/02/26; enrollment; phone=cell; ...	Adult	
	Sarah	21 Dec 2026	Yes		#CT-1/223/27; #MRIL-9/25/27	Adult	

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 no entry in the Background Check Exp. Date field, but does have background clearance information in the comment field. As background checks are renewed, the #BGC hashtags in the comment field will be moved to the dedicated field. Clearance training and Mandated reporting training hashtags will continue to only be found in the comment field.

The clearance hashtags in the comment field should always be kept as the beginning entry of the Comment field, and these entries are only updated by the Training Institute.

An individual is properly cleared if the dates for the Background Check, Clearance Training (#CT), and Mandated Reporter Training (#MRIL or #MRWI or #MRMN) are all current. Not all cleared volunteers will also have motor vehicle clearance.

A custom list is needed to create a list of cleared individuals. How to create this custom list follows the Hashtag format information below.

Hashtag format

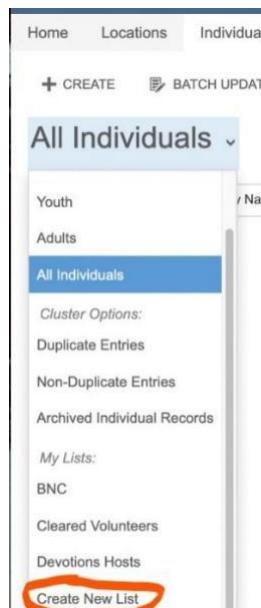
The format for the clearance entry includes these hashtags: #CT-08/12/27; #MRIL-08/17/27; Previously, the basic clearance information was also stored in the comment field as: #BGC MVR-08/17/26; The basic clearance hashtag may still be present in the comment field and will be removed when the clearance 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. This list is a Custom List. Look at the Tab Bar across the top and click on **Individuals**. Click the drop down menu beside **All Individuals** and you will see:



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.

Display Information Sort Order Data Filters

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

List Name*

Available columns

- Sex
- Estimated Age
- Date of Birth
- Registered Bahá'í
- Date Registered
- Bahá'í ID
- Devotional Host
- Archived
- Archive Date
- Focus Neighbourhood

Selected columns

- Family Name*
- First Name(s)*
- Background Check Expiration Date
- Motor Vehicle Clearance
- Comments
- Age Category

Under **New Custom List**, it shows 3 tabs that you will use: Display Information, Sort Order and Data Filters. Begin with **Display Information**. Write the name of the List in the Rectangle under **List Name**. Please title this list as **Cleared Volunteers**.

There is a list of fields under **Available columns**. The recommended fields to select are shown in the example. The order of the columns listed on the right can be changed by selecting an item under the **Selected columns** and using the up and down arrows to change its position.

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*	Then By	Order	+
Family Name		Ascending	+
First Name(s)		Ascending	+

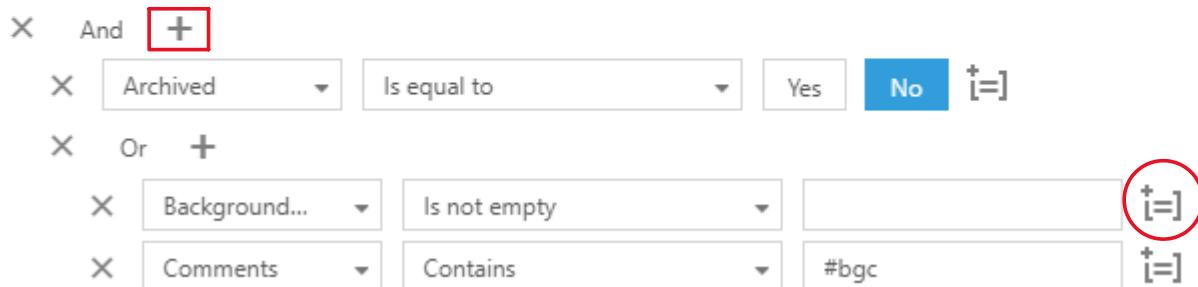
The next example shows what the Data Filter should look like.

First click on the + next to And to add the first line of the filter. Second, click on the + next to the And again to add another line. Third, click on the += symbol to the right of the second line to add two more lines. For these two lines change the And to Or as shown in the example by clicking on the And. Then add the criteria as given in the example. When the filter is set up, click OK at the bottom of the page.

Clearance list v2

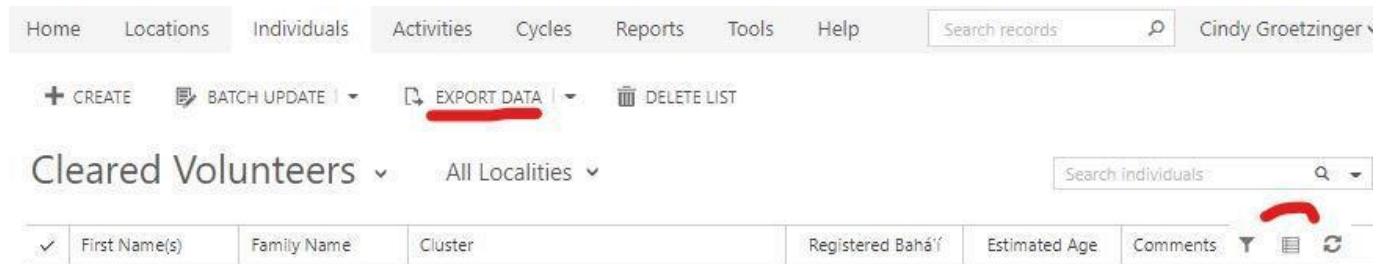
Display Information Sort Order **Data Filters**

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



The screenshot shows a 'Data Filters' configuration. It starts with an 'And' operator, followed by a condition 'Archived Is equal to Yes'. Below this is another 'And' operator, followed by two conditions: 'Background... Is not empty' and 'Comments Contains #bgc'. The 'Comments' condition is highlighted with a red box. The '+=]' symbol to the right of the 'Comments' condition is circled in red.

After you create the List, it can be seen listed under the 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.



The screenshot shows a list titled 'Cleared Volunteers'. The top navigation bar includes 'Home', 'Locations', 'Individuals', 'Activities', 'Cycles', 'Reports', 'Tools', 'Help', a search bar, and a user name 'Cindy Groetzing'. Below the navigation are buttons for '+ CREATE', 'BATCH UPDATE', 'EXPORT DATA' (highlighted with a red box), and 'DELETE LIST'. The main list table has columns for 'First Name(s)', 'Family Name', 'Cluster', 'Registered Bahá'í', 'Estimated Age', 'Comments' (highlighted with a red box), and a few other columns. A 'Search individuals' bar is at the top of the list table.

And there you have it. Anytime you want to see the current cleared volunteers, go to the Individuals tab, and under custom lists select the Clearance List.