Contents

Get Connected for CERT Coordinators

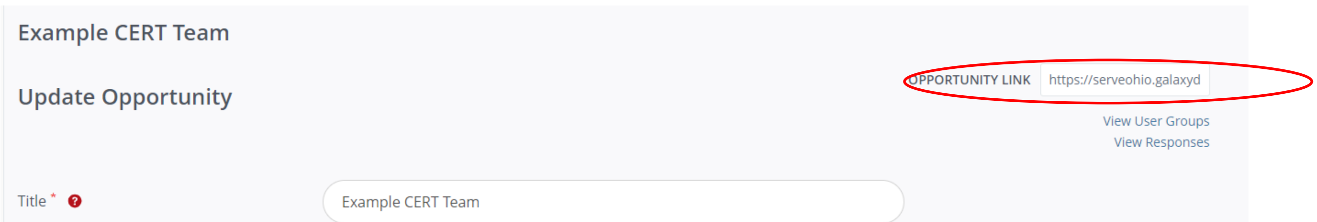
Step 1: Create Your Organizational Account

Step 2: Create an Ongoing Private Opportunity for Your Fully Trained Volunteers

Be sure to select "Private" for Privacy and "Ongoing" for the Duration. The respondents to this opportunity serve as the list of volunteers who are covered via limited liability.

Step 3: Send the Link to your Certified Volunteers

From your CERT Team opportunity, copy the opportunity link.



Send this link to your fully certified CERT volunteers with the following instructions and attach the Get Connected CERT Volunteer Guide:

Once you have created your Get Connected account using the attached instructions, follow this link: [INSERT LINK]. Click the RESPOND button then the SUBMIT OPPORTUNITY RESPONSE button to be added to the official CERT Team roster.

You also have to ability to manually add volunteers to an opportunity once they have an account on Get Connected.

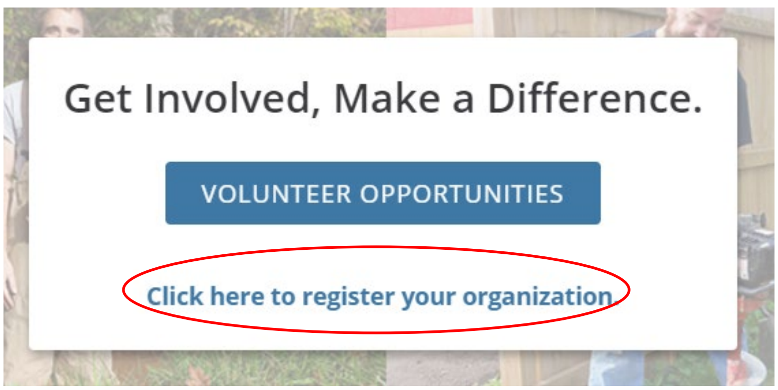
Creating Organizational Account

There are two ways to access the organization registration page of Get Connected. Both ways begin on the landing page.

Note: To register your organization on Get Connected, you will need to be logged out. If you are already logged in, go to your profile dropdown to log out and access the site's landing page. You'll be asked to log back in as part of your registration.

Method #1

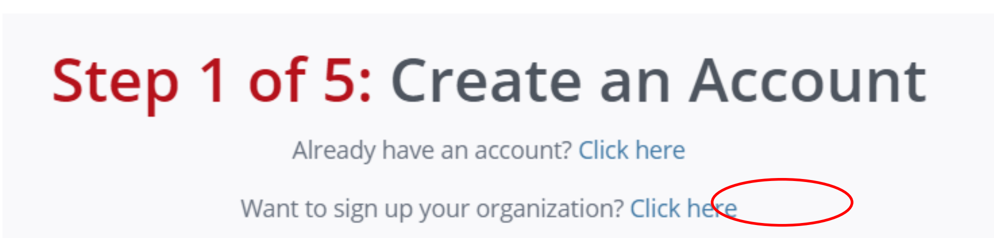
Go to Get Connected's landing page. Under the search bar, you'll see the **Click here to register your organization** link.



Click this link to access the registration form.

Method #2

1. Go to your Get Connected's landing page and click the red **Sign Up** button, located in the top right-hand corner of your screen.
2. Under the **Create an Account** heading, click the link for signing up an organization.



Either of these methods will take you to the fields needed for signing up an organization. Once you've completed these fields, click **Request Account**.

Note: The email address you provide will be associated with the primary organization manager unless otherwise specified.

Note: Hovering over the red question marks will provide an explanation of the question.

Note: Clicking **Request Account** indicates that you have read and agree to the site's terms and conditions. A link to these terms and conditions are provided at the bottom of the sign-up screen.

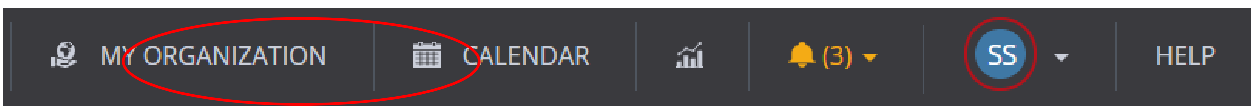
You should be taken directly to your organization manager page. If you aren't, just click the **Manage Organization** button at the top of your screen.

Accessing the Organization Management Area

This management area is where you can edit your organization's profile, add and edit opportunities, and approve volunteer hours that have been submitted.

To access your management area:

1. Log into your site.
2. Click the **My Organization** button at the top of the screen.



Note: If you manage two or more organizations, you'll need to click the button to view and select from a list of the organizations you manage.

Editing an Organization Profile

The profile is divided into eight main areas:

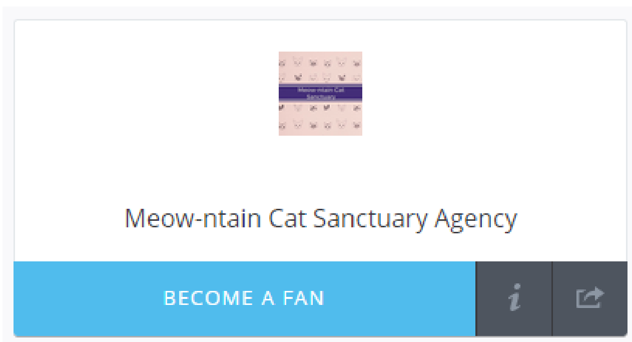
- Logo
- Managers
- Basic Information
- Contact Information
- Location
- Links
- Descriptions

- Photos

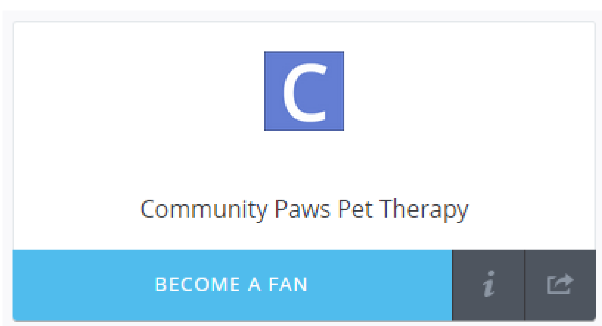
Most areas contain information fields, and all have an **Update** button. Clicking this button saves all of the information in your profile--regardless of what areas have been edited since the last update.

Logo

Your logo is an important part of your organization profile. It appears in organization searches by volunteers, as well as on the main page of every opportunity you post. Here's an example of an logo:



If you don't upload a logo, then the first letter of your organization name will be displayed in a colored box in place of a logo:

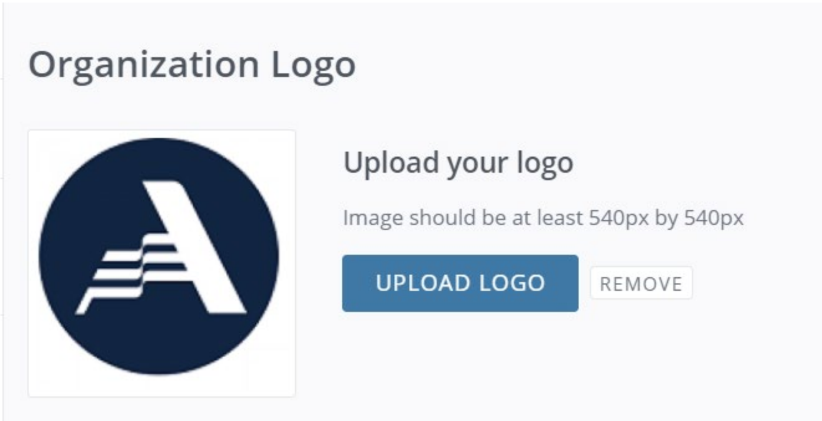


Note: The color of the box around the letter changes with each new view.

<u>Uploading Your Logo</u>

To upload your logo:

1. In your manager area, click **Upload Logo**.



2. Browse to the logo, select it, and click **Open**.

Note: The image should be at least 540 pixels by 540 pixels. You'll be able to resize it in the next step.

3. (as needed) Click and drag the borders to resize the image.

4. Click the applicable **Save** button.

Note: To remove a logo, click **Remove** under the **Upload your logo** heading. To replace an existing logo, first remove it and then upload a new one.

Making Your Logo Appear Larger

Some logos may appear larger than others. Here are a couple of tips for making your logo appear as large as possible in the space provided:

- Use a logo that is roughly as wide as it is tall. Perfect squares and circles are best.
- Use the cropping tool to crop out as much surrounding white space as you can or crop the image before uploading it.

Organization Managers

An *organization manager* is someone who can access the management area for an organization. This individual can edit the organization's profile, post opportunities, and approve hours on behalf of the organization.

Each organization must have at least one manager. If there is more than one manager, one person serves as the primary manager while all others are secondary.

Primary and Secondary Organization Managers

To register your organization, you must submit an email address. The system associates this email address with *primary organization manager*.

In addition to the capabilities mentioned above, a primary manager can add and delete secondary managers.

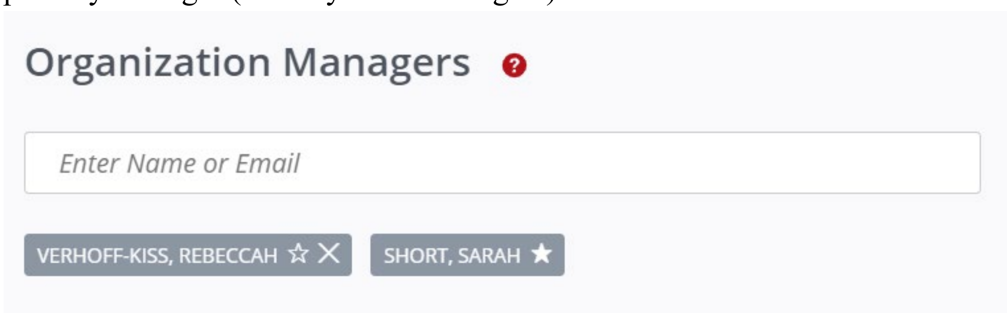
Secondary managers can be added to an organization once it's been created. Secondary managers have all of the capabilities mentioned above but cannot add or delete other managers.

Note: You can have up to 12 managers per organization.

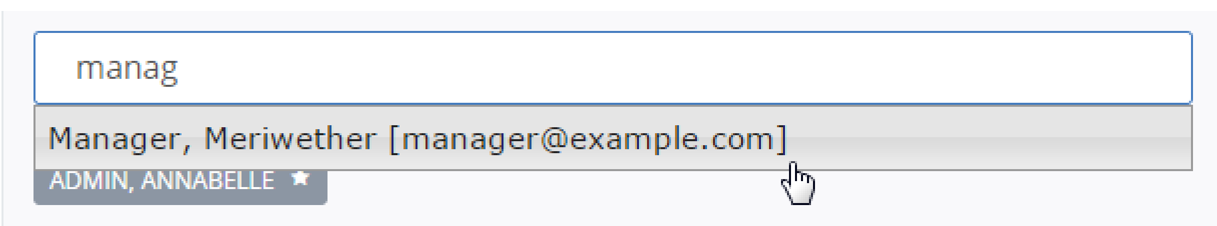
Adding a Secondary Manager

To add additional managers:

1. Go to your management area. Under the "Managers" heading, you'll see the name of the primary manager (and any other managers).



2. Begin typing the email of the individual to be added. If that email is registered on your site, it will show up and you can select it.



Note: If the person's email address is not displayed, the person is does not have a Get Connected account. If you're certain that they *do* have an account, check the spelling or consult your records to make sure you have the correct email address.

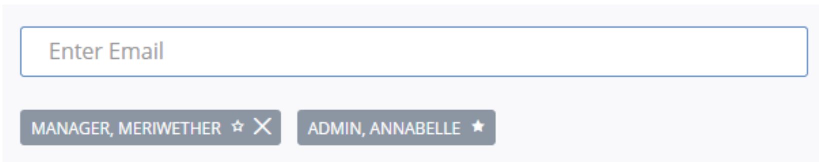
It is not necessary to click an **Update Info** button; the manager information is saved automatically.

Deleting a Secondary Manager

Only a primary organization manager (or a site manager) can delete a secondary manager from an organization. The instructions below pertain specifically to organization managers who are the primary managers.

To delete a secondary manager:

1. Go to your management area. Under the **Managers** heading, you'll see the name of the primary manager (and any other managers).

   In the image above, note that the Annabelle Admin has a solid star next to her name, indicating that she is the primary manager. Meriwether Manager has a clear star, indicating that he is the secondary manager.

2. Click the **X** next to the secondary manager's name to delete it, and then click **Yes** to confirm the deletion.

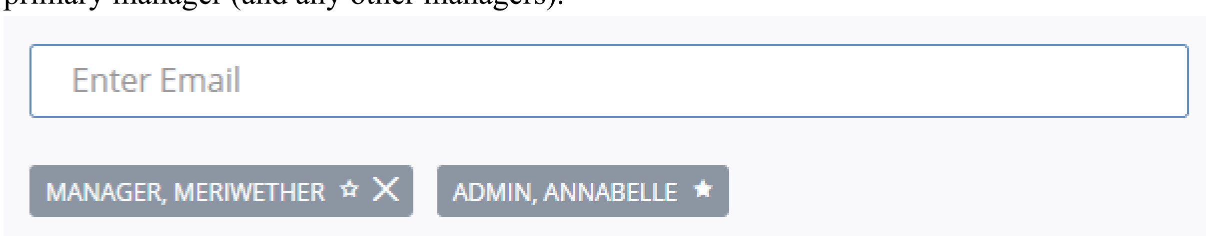
Making a Secondary Manager Primary

The primary manager has the ability to make someone else the primary manager for their organization.

Important: Each organization has only one primary manager. If, as the primary manager, you make someone else the primary manager, you will automatically become a secondary manager and will no longer be able to make changes to the other managers listed.

To change a secondary manager to a primary manager:

1. Go to your management area. Under the **Managers** heading, you'll see the name of the primary manager (and any other managers).

Note that the primary manager (Annabelle Admin) has a solid star next to her name. This solid star indicates primary manager status, while the outline of a star (such as the one next to Meriwether Manager's name) indicates secondary manager status.

2. Click on the secondary manager's star outline, and then click **Yes** to confirm that you want to make that individual the primary manager.

Once you have given someone else primary manager status, you will no longer see the **X** that allows you to delete another manager. You'll also see only the solid star that indicates the primary manager. In the example below, we are still logged into Annabelle Admin's account, but she is no longer the primary organization manager.

<u>Basic Information</u>

The "Basic Information" section of the profile contains the fields described below.

Organization Name	The name of your organization; completed automatically based on your entry when signing up your organization.
Customize Link	This field helps you create a direct link to the profile page. The link will consist of: (1) the site's web address (2) /agency/detail/ (3) the unique label that you enter in this field. For example, if Community Paws Pet Therapy's profile is located on the serveohio.galaxydigital.com site and the organization manager enters "cppt" as the customized link, their profile page will be located at serveohio.galaxydigital.com/agency/detail/cppt.
Hours of Operation	Because this is a free-text field, you do not have to use any special format to enter days and times.
Causes	Use this field to identify the causes your organization supports. Your selections will be used to match volunteers with agencies that interest them.
Video	Once you've uploaded your video to YouTube or Vimeo, enter your video's YouTube or Vimeo URL here.

Contact Information

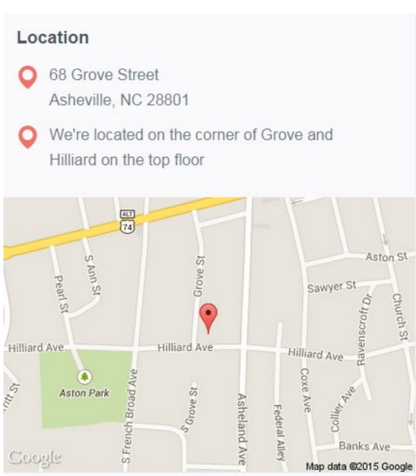
The "Contact Information" section of the profile consists of fields described below. The Email, Phone, Fax, Contact Person, and Contact Title information will be displayed publicly on your site.

Email	Enter the email address used for general inquiries.
Phone, Fax	Enter the phone and fax (if applicable) numbers.
Contact Person	Enter the name of the primary contact.
Contact Title	Enter the primary contact's title. **Note:** A person does *not* have to have a user account in order to be listed as a primary contact.
Additional Contact Email Addresses	Enter the emails you would like to have copied (cc'ed) on all opportunity responses and RSVPs sent to the organization managers. **Note:** A person does *not* have to have a user account in order to be listed as an additional contact.

Important: The email address entered here is for viewers who wish to contact your organization by email. It is *not* used for automated notifications. Only the organization managers and additional contacts receive automated notifications.

Location

The address you enter here will be shown on the map on your profile page. Here's an example:



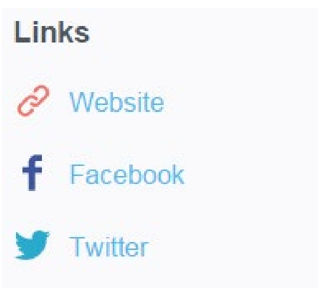
Note: If you don't want your address to be public or shown on a map, you can enter a P.O. Box instead of a street address.

The **Additional Location Information** field can be used for the following types of information:

- Parking instructions if needed
- Landmarks to help people find you
- Instructions for getting to a suite or other office within a larger building
- Information about multiple locations

Links

Use this section to provide your website URL, along with your Facebook and Twitter pages. These links will appear as *Website*, *Facebook* (with Facebook logo), and *Twitter* (with Twitter logo), respectively.

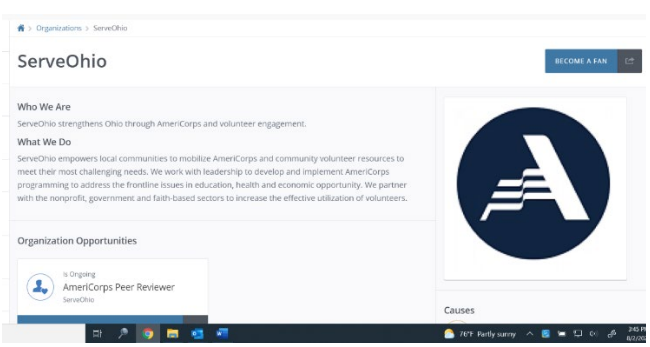


Descriptions

The "Descriptions" area of your profile consists of two sections:

- **Who We Are** - History, mission, and vision
- **What We Do** - Programs and services

Because the descriptions are so important, they appear at the top of your profile page, next to the logo.



Tip: For easier viewing, try to limit your descriptions to just a couple of paragraphs.

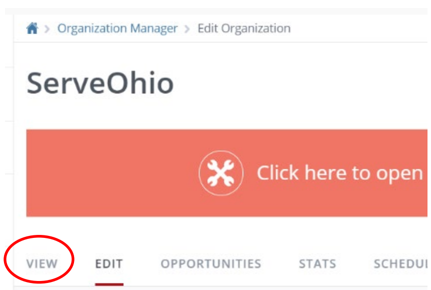
<u>Photos</u>

You can add up to 12 photos. Photos are displayed in slideshow format at the bottom of the profile page. Photos must be image files (jpg/jpeg, png, or gif) in order to load properly.

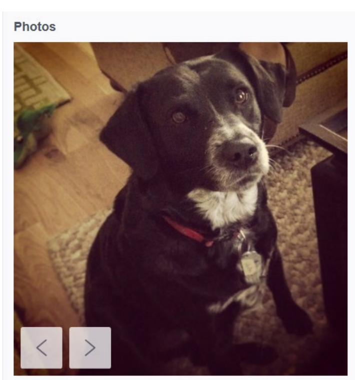
To add a photo:

1. In the "Photos" section of your profile editing page, click **Add New Photo**.
2. Browse to the photos you want to add and select them.
3. Either click **Open** or simply drag and drop the photos into the **Add New Photos** box. This action adds the pictures to your page.
4. Click **Okay** or click **Refresh Now** to view the pictures on your profile editing page.

To see the slideshow of your photos, scroll to the top of the page and click **View**.



The photos are automatically displayed as a slide show, but a user can also manually scroll through them by clicking the arrows in the bottom left-hand corner of the picture.

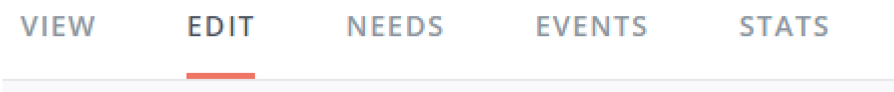


Adding and Managing Opportunities

How to Post an Opportunity

To post an opportunity on Get Connected:

1. Log in and go to your organization management area by clicking the **My Organization** button at the top of your screen. If you manage more than one organization, click **My Organizations,** and select from the list provided. By default, you will be taken to the **Edit** tab of your manager view.



2. Click **Opportunities**.

3. Click **Add New Opportunity** to open the **Create Opportunity** form.

4. Complete the fields in the form. Fields are described below.

Field	Description
Title	Enter an opportunity title.
Description	Enter an opportunity description. If training or a background check is required, you can include that information here.
Initiative	Select the initiative, if applicable, with which to associate the opportunity.
Privacy	Select whether to make the opportunity public (available to all site visitors) or private (available only to an assigned user group, or via a private link).
Duration	Select a duration. Options are **Ongoing**, **Runs Until**, **Happens On**, **Multi-date**, **Custom Shifts**, and **Recurring Shifts**.
Capacity	If applicable, enter the number of volunteer slots available for this opportunity.
Allow Team Registration?	Indicate whether you do not want to allow team registrations, you do want to allow team registrations, or you want to allow *only* team registrations. When searching opportunities, users can filter

	opportunities by which opportunities accept (or don't accept) team registrations.
Minimum Age	Select the minimum volunteer age accepted for this Opportunity. Once you've entered an age range (starting with this field), volunteers can search for the opportunities best suited to their age group.
Maximum Age	Select the maximum volunteer age accepted for this Opportunity. Once you've entered an age range (starting with the previous field), volunteers can search for the opportunities best suited to their age group. *Tip: if you put the maximum age as 120, the age range will show as min. age+*
Family Friendly?	Indicate whether the opportunity environment is family friendly. Volunteers can search specifically for family-friendly opportunities.
Outdoors?	If you select **Yes** to indicate an outdoor opportunity, you will have the opportunity to provide inclement weather plans. Volunteers viewing this opportunity will see this information in the **Details** area at the bottom of the opportunity-information page. They will also be able to search all opportunities on your site by which ones are (or are not) outdoors.
Wheelchair Accessible	Indicate whether the opportunity will be wheelchair accessible. Volunteers viewing this opportunity will see this information in the **Details** area at the bottom of the opportunity-information page. They will also be able to search all opportunities on your site by which ones are (or are not) wheelchair accessible.
Attributes	If you want additional details to stand out from the description above, include them here. Each detail (attribute) must be 200 characters or fewer. Attributes appear in the **Details** section at the bottom of the opportunity-information page.
Virtual Opportunity	Indicate “yes” if the opportunity can be done at home or at another off-site location.

Address	Enter the address of the opportunity.
Zip Code	(required) Enter the zip code associated with the opportunity. Users can search opportunities by ZIP codes.
Skills & Abilities	Select skills related to the opportunity. Your selections will help the site to match up this opportunity with potential volunteers. Users can also search opportunities by interest.
Additional Notification Recipients	To have certain people copied on all responses to this opportunity, turn this option **On** and type each recipient's email address on a separate line. Recipients will also be notified when volunteers unregister from the opportunity. An additional notification recipient is not required to have a Get Connected account.
Designate a Site Supervisor	This field allows you to add a site supervisor's name and email. This information will eb visible to all users.
Waiver	If a waiver is added, a volunteer must indicate that he or she agrees to it before they can complete their opportunity response. Click **Choose File** to select the waiver to upload. Acceptable file formats are .doc, .docx, and .pdf.

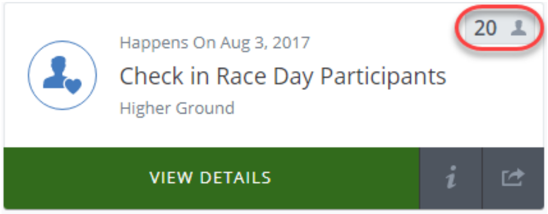
5. Click **Create Opportunity**.

<u>A Note on Runs Until, Happens On, Multi-date, and Shift Opportunities</u>

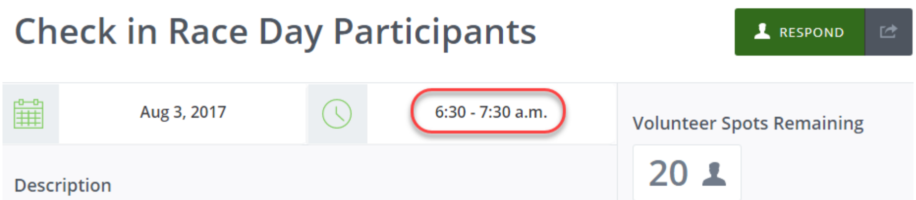
If you indicate that an opportunity will be something other than **Ongoing**, you'll be shown fields for entering more information.

The additional fields (**Capacity**, **Hours**, and **Registration Closed Date**) are optional.

- If you are accepting a limited number of volunteers, enter the number of volunteers needed in the **Capacity** field. The number of available volunteers will be displayed on the public site; as each volunteer responds, the number of available volunteers displayed will decrease. In this example, there are 20 volunteer spots remaining.



- Once the capacity has been met, the opportunity will be displayed as "full," and volunteers will no longer be able to see or respond to it. Those who have responded to the opportunity will still be able to access it via their profile or a saved link.
- If the opportunity is going to take place at a certain time of day, you can enter the time(s) in the **Hours** field. This information is shown on the opportunity information page.

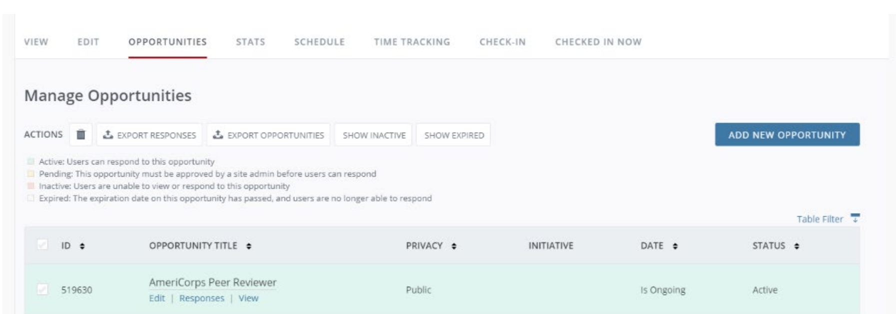


- If you want to indicate a cut-off date for registration (after which volunteers can no longer respond), indicate that date in the **Registration Closed Date** field. Users will still be able to access the opportunity information, but they will not be able to respond after 12:00 a.m. on the date registration closes. The opportunity itself will be displayed as "Closed."

<u>How to Edit an Opportunity</u>

<u>To edit an existing opportunity:</u>

1. In your manager view, click **Opportunities**. All of your organization's existing opportunities are displayed in a table under **Manage Opportunities**.

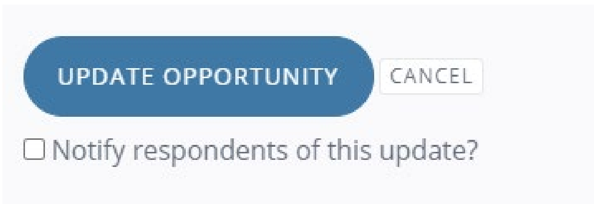


Note: Expired opportunities are shown in faded text. To show or hide expired opportunities, click the applicable **Expired Opportunities** button above the table. To sort opportunities by ID, title, date, date type, date added, date updated, or status, click on a column heading. Click **Table Filter** to add or remove columns.

2. Click on an opportunity to edit it (or click the **Edit** link beneath the opportunity title).

3. Make any changes needed.

4. Optional: If you changed the opportunity description, date, time, or address/city/state/ZIP and wish to notify registered volunteers of the change, mark the **Notify respondents of this update** check box.

This notification is not sent for changes to fields other than the ones listed in Step 4 above.

5. Click **Update Opportunity**.

How to Clone an Opportunity

Create the Base Opportunity

To create an opportunity:

1. Go to your organization manager view and click the **Opportunities** tab.

2. Click **Add New Opportunity** on the right-hand side of the screen to open the **Add Opportunity** form.

3. In the title of your opportunity, indicate how the opportunity is unique. (For example, if you'll be creating multiple "Reading Buddies" opportunities for different library branches, you might title the first opportunity, "Reading Buddies - Downtown Branch."

4. Enter an opportunity description.
   Tip: Since you will be cloning the opportunity, make sure the description is generic enough that you don't have to change it each time you clone the opportunity.

5. Complete the other fields as needed, including the **Duration**, **Opportunity Date**, **Capacity** (if applicable), and **Hours** fields.

6. Click **Create Opportunity** to save the opportunity.

Clone the Base Opportunity

Once you've created the base opportunity, you can clone it as many times as necessary, once for each version you wish to post.

To clone an opportunity:

1. From your organization management area, click on the opportunity you wish to clone.
2. Scroll to the bottom of the page and click **Clone Opportunity**. Click **Yes** to confirm. Your site will display the cloned opportunity, which will be identical to the base opportunity, with two differences: The title will include the word "copy" in parentheses, and the duration will be blank.
3. Update the **Title** by (1) removing the word "copy" and (2) indicating how the opportunity is unique. Going with the above example, you might title this one, "Reading Buddies - Uptown Branch."
4. Complete the **Duration** field and any duration details as needed. The duration does not have to be the same as it was in the base opportunity.
5. Update the **Description** and any other fields as needed.
6. Click **Update Opportunity** to save the cloned opportunity.

To clone another opportunity, simply click **Clone Opportunity** again and repeat the process described above.

How to Deactivate an Opportunity

When an opportunity is deactivated, it is no longer displayed on your site, and volunteers can no longer respond to it.

To deactivate an opportunity:

1. In your manager view, click **Opportunities**. All of your organization's existing opportunities are displayed in a table under **Manage Opportunities**. (See image above)
2. Check the box to the left of each opportunity(s) you want to delete.
3. Click on the "trash can" icon in the **Actions** row above the table.
4. Click **Yes** to confirm that you are deactivating the opportunity.

To view an inactive opportunity, click the **Show Inactive** button (shown in the image above).

Notification of Opportunity Response

When a volunteer responds to one of your opportunities, an automated notification goes out to your organization managers and to anyone listed as an additional notification recipient. This notification shows the opportunity title, volunteer name and email address, and any details and additional notes that the volunteer provided on the opportunity response form.

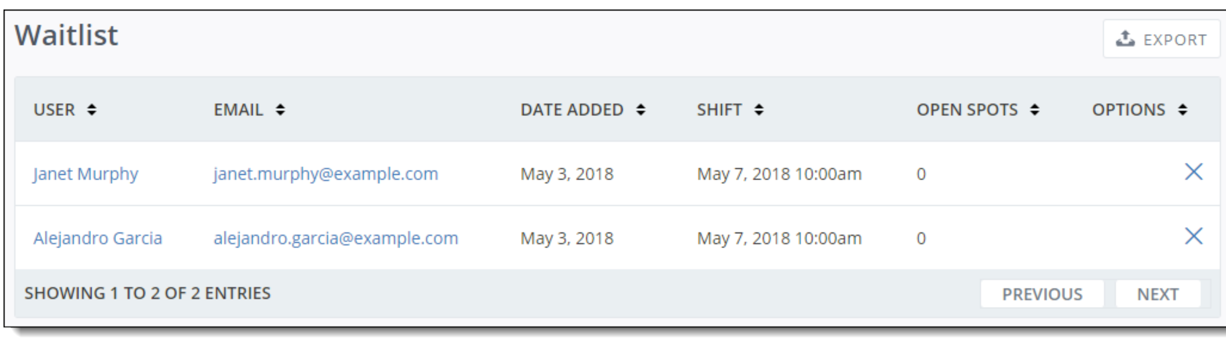
The volunteer also receives a notification confirming their opportunity response.

Using Volunteer Waitlists

Viewing the Volunteer Waitlist

To view the volunteer waitlist for an opportunity:

1. Go to the **Opportunities** area of your site manager panel.
2. Click on the applicable **Edit** link for an opportunity.
3. When the posting page for that opportunity opens, scroll down to the **Waitlist** table at the bottom of the page. The table displays a waitlisted volunteer's name and email address, the date the volunteer was added to the waitlist, the shift they're waitlisted for, and the number of open spots. Note that you can export the waitlist to a spreadsheet as needed.



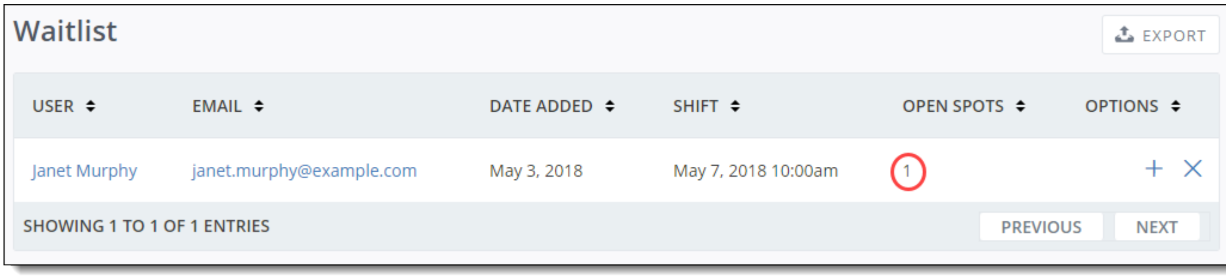
Note: If the opportunity is a non-shift opportunity (i.e., it has a duration of Happens On, Runs Until, or Multi-Date), the shift time may not reflect the actual time of the shift.

Moving a Volunteer from "Waitlisted" to "Registered"

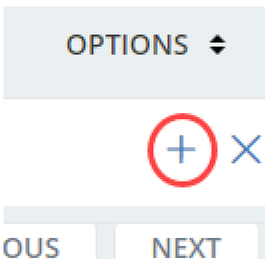
When a spot opens up for an opportunity, the waitlisted volunteers will automatically be notified five minutes after the spot opens. The spot is available on a first-come, first-served basis.

Note: A spot may open up if a volunteer unregisters from an opportunity, or if an organization or program manager or site manager manually removes a response. Any primary or secondary manager will receive an email if a volunteer unregisters.

Once a spot is available, you have the option to convert someone's waitlist status to a registered response. In the image below, note that there is an open spot for the opportunity displayed:



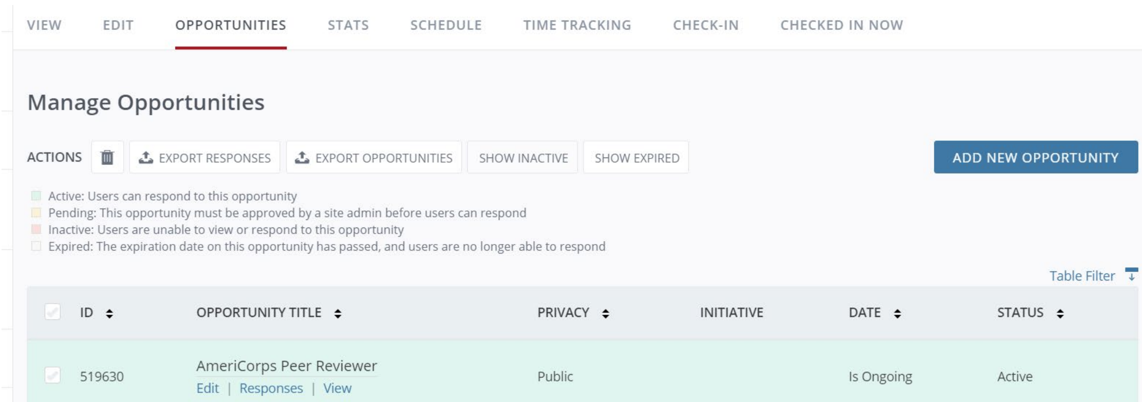
If a spot is available, the **Options** column includes a "plus" icon.



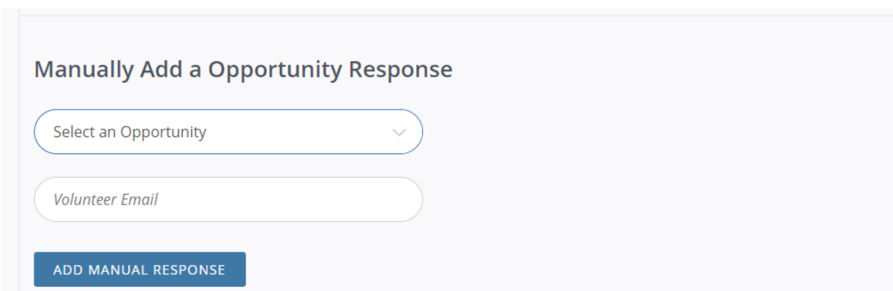
To convert the waitlisted item to a response, click the plus sign, and then click **Yes** to confirm. The volunteer will immediately be notified that they are now registered for the shift, and they will be expected to show up at the scheduled date and time.

Manually Adding a Volunteer to an Opportunity

The **Opportunities** section of your organization management area lists all your organization's active, current opportunities. You can add a volunteer to an opportunity manually here **<u>if they already have any account on Get Connected.</u>**



To manually add a volunteer to an opportunity, scroll down to the "Manually Add a Opportunity Response".



Select the opportunity you want to add to using the "Select an Opportunity" dropdown.

Type in the volunteer's email.

Click "Add Manual Response"

The volunteer will receive and email notifying they have been added to the opportunity and it will now show up in their account.

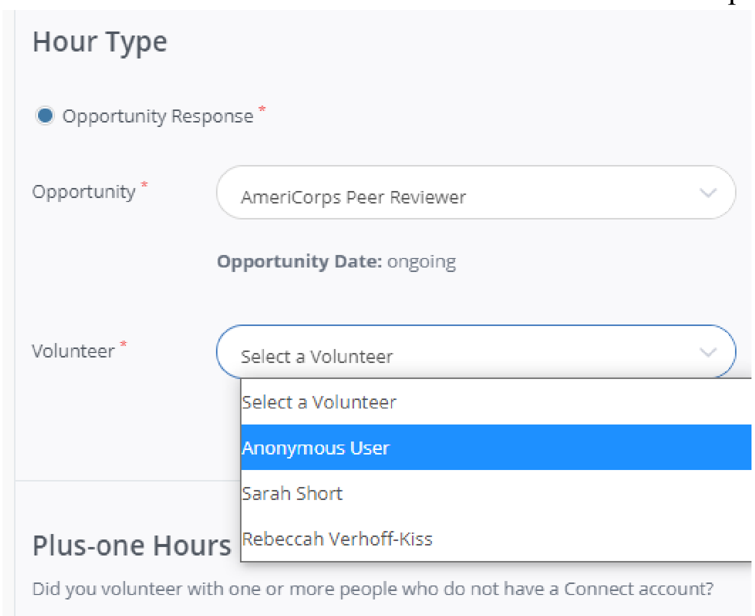
The volunteer will also be included in the opportunity responses.

Managing Volunteer Hours

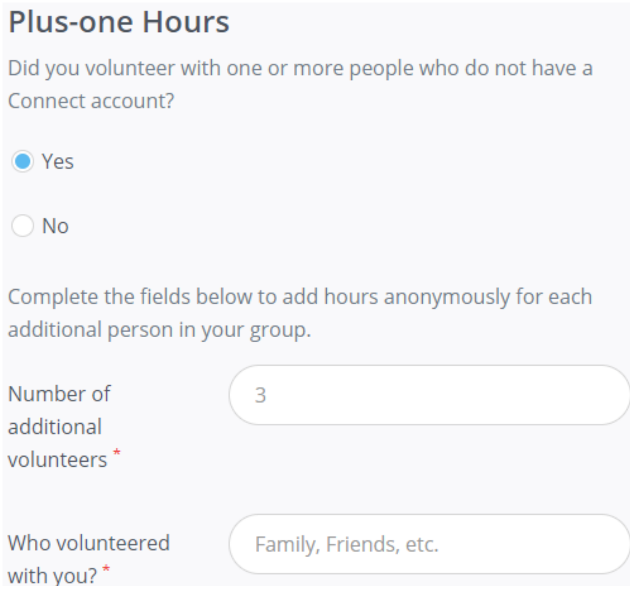
Volunteer hours are managed under the **Time Tracking** tab, which you can access by clicking **My Organization** at the top of your screen.

Adding Volunteer Hours

1. From the organization manager view, click **Time Tracking**.
2. Under the **Hour Type** heading, select the applicable opportunity.
3. Select the name of the volunteer from the **Volunteer** dropdown.



4. Enter the **Date** the hours were earned.
5. Complete the applicable **Hours Details** and **Description** information.
6. Scroll down to select if you want to add Plus-one Hours. This option is used when the volunteer you are entering hours for brought family or friends to help with the opportunity who do not have a registered account. If you select **Yes**, you will be asked to complete additional fields.



7. Click **Submit Hour Entry** to save your work.

Adding Anonymous Hours

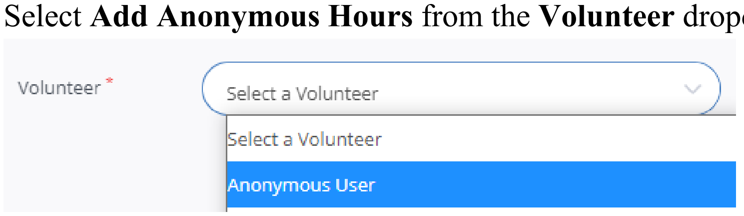
Anonymous hours are volunteer hours submitted on behalf of volunteers who are not associated with a particular user account in Get Connected. An organization manager can submit hours for:

- Groups of volunteers who may or may not have Get Connected accounts
- Volunteers who do not have a Get Connected account

Of course, you should encourage your volunteers to open a Get Connected account so that they can log their own hours. If a user doesn't have an email address or otherwise does not want to open an account, you can still log their hours. Anonymous hours show up in administrative reports but cannot be applied to individual volunteer résumés.

To log anonymous hours as an organization manager:

1. From your organization manager view, click **Time Tracking**.
2. Under the **Hour Type** heading, select the applicable opportunity.
3. Select **Add Anonymous Hours** from the **Volunteer** dropdown.



4. Complete the applicable fields. Use the **Description** field to provide any relevant information about the names of the volunteers, the number of volunteers, etc.

5. Click **Submit Hour Entry** to save your work.

Note: Anonymous hours show up in administrative reports but cannot be applied to individual volunteer résumés.

Approving and Declining Volunteer Hours

Before you can approve a volunteer's hours, the volunteer must respond to an opportunity and submit his or her hours related to that opportunity (via the user's **My Profile** page). As the organization manager, you will receive an email notifying you that hours need to be approved.

To approve (or decline) volunteer hours:

1. Go to the gray **Time Tracking** tab in edit mode. You will see a list of opportunity responses, along with **Pending** statuses in the table shown.

Volunteer Hours

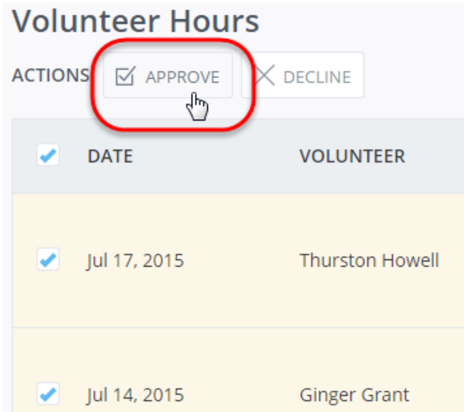
ACTIONS APPROVE DECLINE

DATE	VOLUNTEER	DETAILS	HOURS	MILES	STATUS
Jul 17, 2015	Thurston Howell	Tour Guide of Facility	1.50	5	Pending
Jul 14, 2015	Ginger Grant	Tour Guide of Facility	1.50	1	Pending
Jul 16, 2015	Mary Ann Summers	Tour Guide of Facility	1.50	4	Pending

Note: The table can show the following columns in addition to the ones shown above: Team, Description, and User Group. To view those columns, click **Table Filter** (right above the table, right-hand side) and mark the columns to view. You can also use the Table Filter to hide columns you don't want to see.

2. Approve or decline the hours as applicable. To approve or decline hours for one person, select **Approved** (or **Declined**) from the **Status** dropdown. To approve or decline hours from more than one volunteer, check the boxes for the volunteers and then click

the **Approve** button above the table.



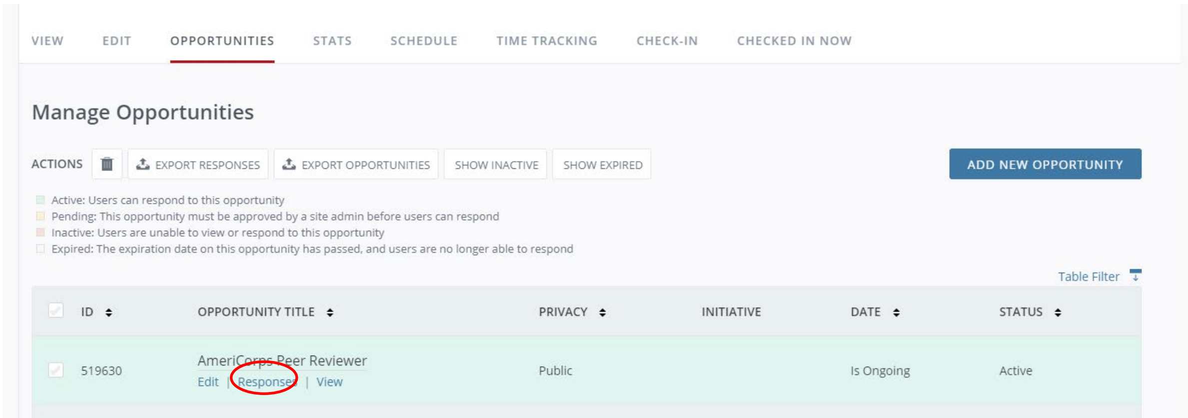
3. Click **Yes** to confirm.

All approved opportunities are available for viewing under the gray **Stats** tab.

Removing Volunteers

1. In your manager view, click **Opportunities**. All of your organization's existing opportunities are displayed in a table under **Manage Opportunities**.

2. Click Responses below the opportunity you'd like to remove a volunteer from.



3. Click the X on the row of the volunteer you'd like to remove from the opportunity.

4. Click Yes to confirm.

Reports

How to Pull a List of Respondents

There are two ways to pull a list of respondents.

Method 1: Go to the Opportunities tab of your organizational profile. To export, first click on the check boxes next to the desired opportunities, and then click the Export Responses button.

Because opportunity-response exports are often large and take more time to generate, you'll be prompted to provide an email address where you'd like the export to be sent, once you've provided your email address, the export should arrive in your inbox within the next minute or two. The export will include the following data:

- Response ID and date
- Opportunity title, shift ID, shift start date and time, and shift duration
- Volunteer first and last name, email address, phone number (if provided), company (if provided), address (if provided), and notes (if provided in the opportunity-response form)
- Team name and team leader (team responses only)

Method 2: click the Responses link under the opportunity title (your CERT Team opportunity for example) on the Opportunities page. The window listing all the responses to the opportunity includes an Export Responses button, and the resulting export will list responses for that opportunity only.

How to Pull Reports of Hours

To view and export approved volunteer hours within a date range:

1. From your organization management area, click Stats to open your Stats page.
2. Select a date range and click Submit Date Range. The default date range is the past month.
3. Select the opportunities that you would like to export and click Export Hours.

The .csv file will be generated automatically, and it will contain the following information:

- Response ID Number
- Number of Hours
- User first and Last Name
- User email

- Opportunity Name
- User Group (if applicable)
- Date Worked
- Check In and Out Times
- Hour Status (i.e., Pending, approved, denied)
- Source (i.e., how the hours were entered, and by whom)
- Miles Traveled (if entered)
- Description (as entered on the hour-submission form)

Volunteer Check-In Kiosk

How to Use the Check In Kiosk

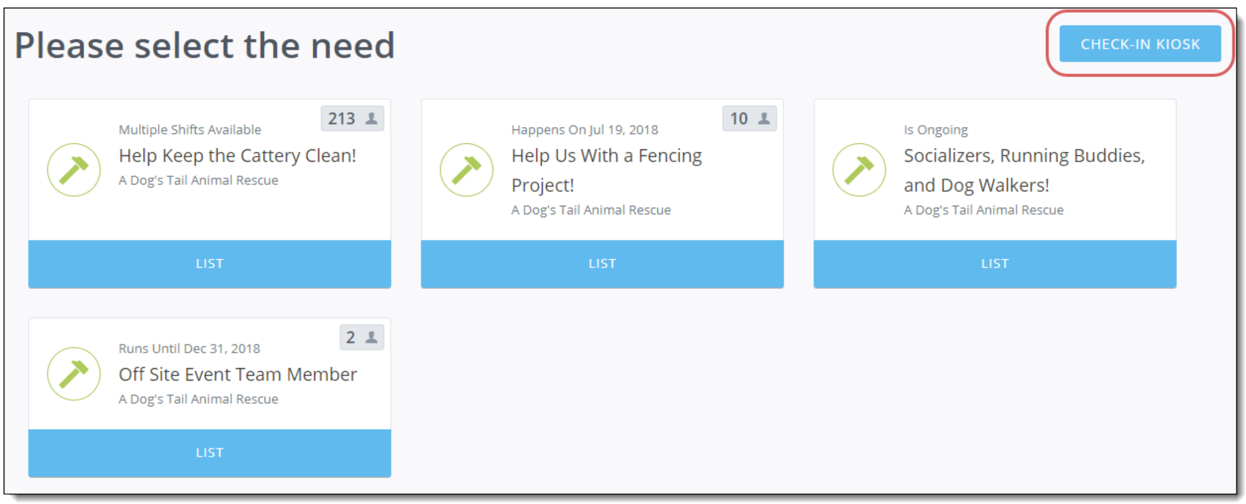
To launch the Kiosk:

1. Log in to your Connect site and click **My Agency** to access your agency management area. (If you manage multiple agencies, select the applicable one.)

2. From your agency management area, click **Check-in** to view the list of needs available for check-in.

Note: Depending on your site's settings you may see just the needs for your agency or program, or you may see needs from all agencies or programs on your site.

3. Click the **Check-in Kiosk** button on the right-hand side of your screen.



4. Click Continue to log out and launch the Kiosk. It is now ready for volunteer use.

Please reference the Get Connected CERT Volunteer Guide for instructions on the volunteer side of the Kiosk.

Checking Volunteers in Without the Kiosk

To access Volunteer Check-In:

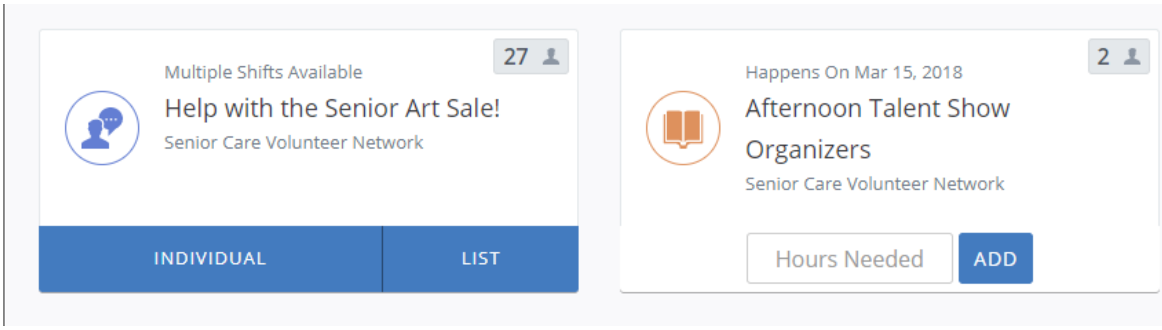
1. Log in and click **My Organization** to open your organization management area.

2. Click **Check-in** from the organization management toolbar.

You will now see all of the active opportunities posted by your organization.

Selecting An Opportunity for Check-in

Opportunities appear in two formats, depending on whether a duration (the number of hours) has been specified for the opportunity.



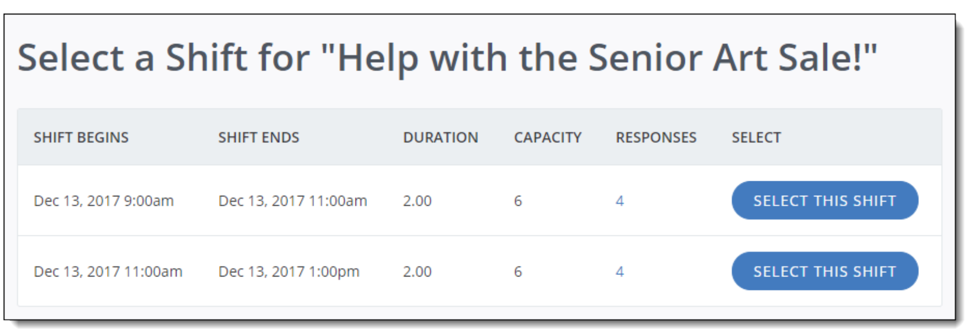
- **Opportunities with a duration** - If the posted opportunity has a specified duration, the opportunity is ready for check-in. You can click **Individual** to check volunteers in one at a time, or **List** to check them in in bulk.
- **Opportunities with no duration** - If no hours have been specified for an opportunity, you must provide the number of hours in order to activate check-in. Type a number into the **Hours Needed** text box and click **Add**. The screen will update to display the **Individual** and **List** options for the opportunity.

Note: If you will be using Volunteer Check-in for multiple opportunities at the same time, you can right-click the **Individual** or **List** button as applicable to open the sign-in pages in new tabs.

Individual View

Individual view is ideal for signing volunteers in one at a time. You should use this view if you expect to check in volunteers who have not yet signed up for the opportunity.

To access this view, click **Individual**. For shift opportunities, you'll need to select the shift first.


Select a Shift for "Help with the Senior Art Sale!"

SHIFT BEGINS	SHIFT ENDS	DURATION	CAPACITY	RESPONSES	SELECT
Dec 13, 2017 9:00am	Dec 13, 2017 11:00am	2.00	6	4	SELECT THIS SHIFT
Dec 13, 2017 11:00am	Dec 13, 2017 1:00pm	2.00	6	4	SELECT THIS SHIFT

Note: Because this setup is ideal for volunteers to check themselves in, your utility bar, navigation menu, and other Connect features available for agency managers are not visible on this page.

Once on the individual check-in page, you (or the volunteer) should type the volunteer's email address and then click **Find My Account**. When your system pulls up the account, you may see options, as applicable, to answer questions or select a user group prior to clicking to check in.

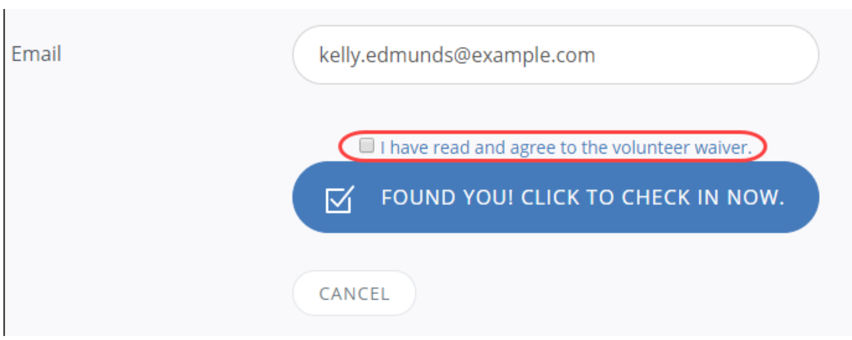
Once the volunteer has checked in, you'll see a confirmation and can proceed to check in the next volunteer.

Checking In Volunteers without an Opportunity Response

A volunteer does not need to have an existing response to the opportunity in order to check in to the opportunities.

If the system does not recognize the email - If an email address is not associated with a registered account, the volunteer will be taken to a screen where they can enter their first and last name to open an account. Once they've registered, they'll be able to check in. They'll also receive an email welcoming them to the site.

If the opportunity includes a waiver - If volunteers were required to agree to a waiver when signing up for the opportunity, the waiver check will be displayed at check-in for those volunteers who haven't yet responded to the opportunity.



List View

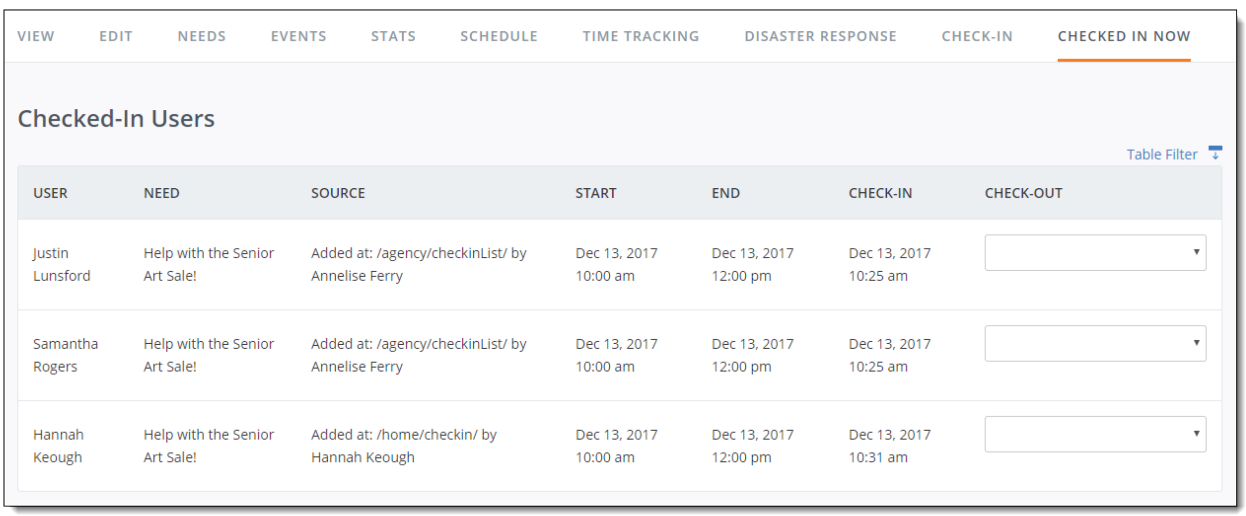
Click **List** to view a list of volunteers who have responded to the selected opportunity.

Note: For shift opportunities, you'll need to select the shift first.

When you're ready to check the volunteers in, mark the check box next to each name (or mark the top check box to select all) and click **Check In Users**. Once the volunteers are checked in, the **Checked In** column entries change from **No** to **Yes**.

Viewing Currently Checked in Volunteers

While the **List** view shows who is checked in, the **Checked In Now** section of your agency management area provides that information and more.



Not only does the table show when the volunteer checked in, but it also shows:

- Whether they checked in using the agency check-in tool (/agency/check in above) or the self-check-in tool (/home/check in above).
- Whose account was used to check them in. In the first two rows above, the agency check-in tool was opened from organization manager Annelise Ferry's account. In the third row, Hannah Keough logged into her own account and checked in from there.

In addition, you can easily access the **Check-Out** option when the volunteer is ready to check out.

Checking Volunteers Out

Using the Individual View to Check Out

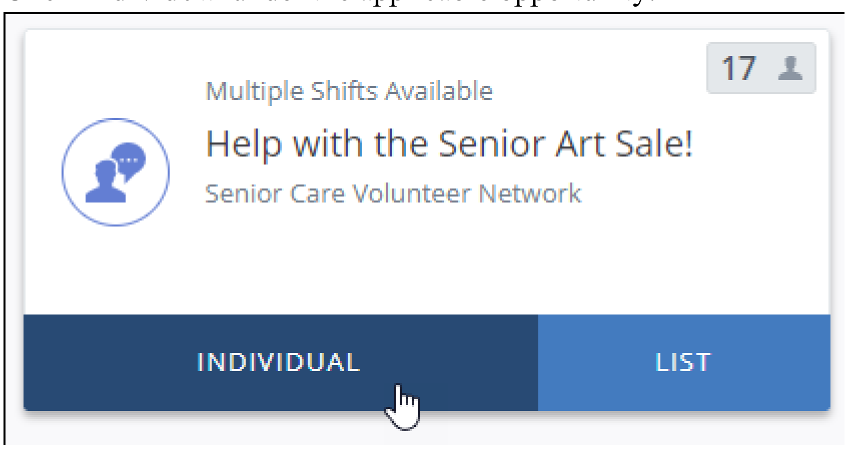
If you used the individual view to check volunteers in, you may still have that view displayed when it's time to check people out. If that's the case, go to Step 2 of the following procedure.

To check out a volunteer (or to have volunteers check themselves out) using the individual view:

1. Go to the **Check-in** section of your organization management area, where you'll see your agency's active opportunities displayed.

Note: Because this setup is ideal for volunteers to check themselves in, your utility bar, navigation menu, and other Connect features are not visible on this page.

2. Click **Individual** under the applicable opportunity.

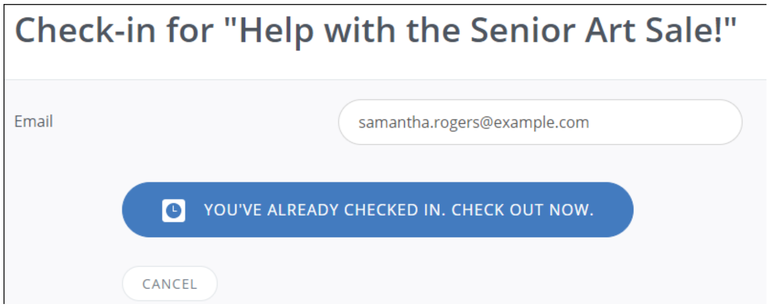


You will be taken to the check-in/check-out page for individuals.

Note: For shift opportunities, you'll need to select the shift first.

3. In the **Email** field that is displayed, type the email address of the volunteer you are checking out.

4. Click **Find My Account**. If the person is already checked in, you'll see a button indicating that.

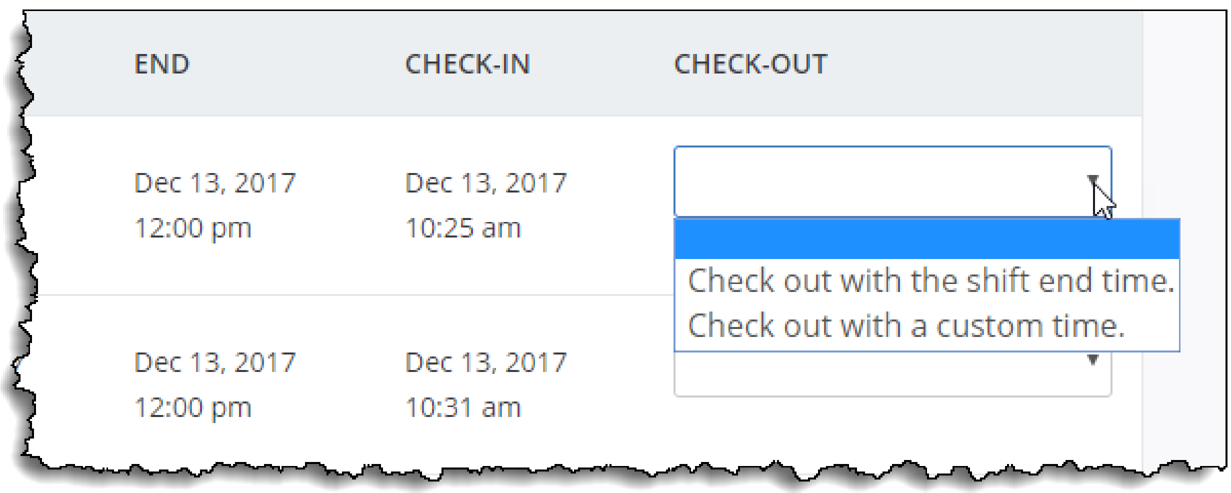


5. Click the **You've Already Checked In** button.

Once the volunteer has been checked out, you'll see a confirmation message on that page.

Using the "Checked In Now" Area to Check Volunteers Out

The **Checked In Now** section of your organization management area includes a **Check-Out** column with options for checking volunteers out.



Options are as follows:

- **Check out with the shift end time -** (Available for shift opportunities only) If you select this option, the system will automatically check the volunteer out at the time specified in the **End** column shown above.
- **Check out with a custom time** - Select this option to specify the time that the volunteer should be checked out. This is the option to use if you want to check the volunteer out at the current time.

Get Connected for CERT Volunteers

Step 1: Create Your Account

Step 2: Register for the CERT Team Opportunity

Once you have an account on Get Connected, you can follow the link to join the team from your CERT coordinator.

Once on the posting, click respond.

By responding to this opportunity, you are listed as a fully certified CERT volunteer with that county.

Step 3: Register for Events/Meetings/Opportunities

Getting Started and Responding as a Volunteer

<u>Creating Your Account</u>

Begin by going to Get Connected and clicking the **Sign Up** button, located at the top of your screen.

You are then taken to the first step, **Create Account**.

1. Enter your name, email address, and any other requested or required personal information. If you want to sign up using your Facebook account, you can do so if your site has that option.

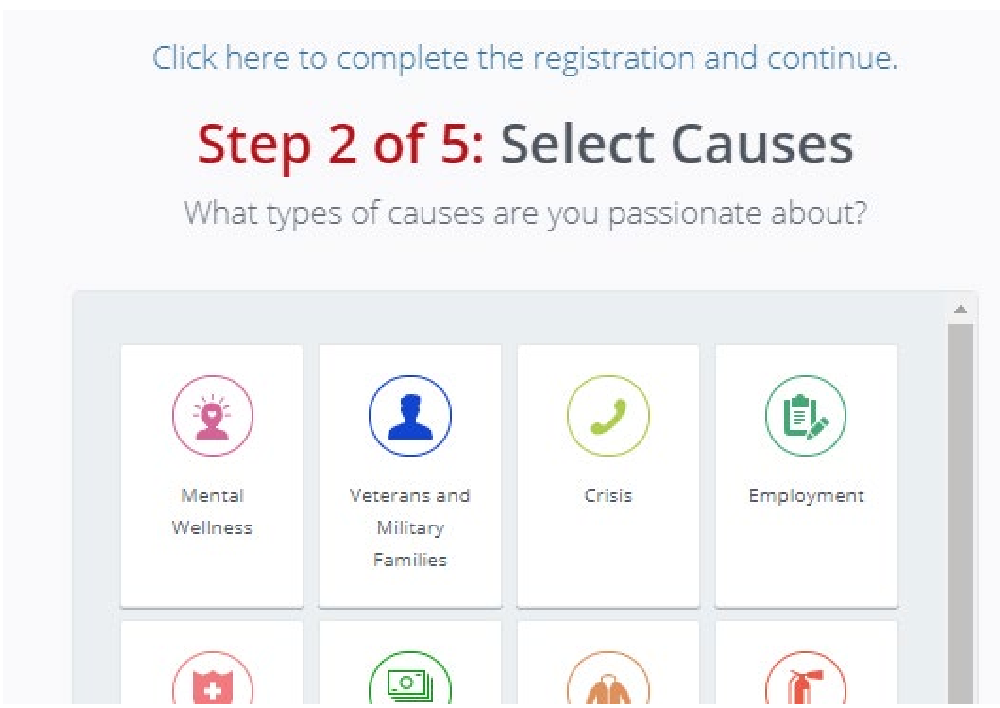
2. Type a password in both the **Password** and **Confirm Password** fields.

Note: Passwords must be at least eight characters long and are not case-sensitive.

3. Click **Create Your Account.**

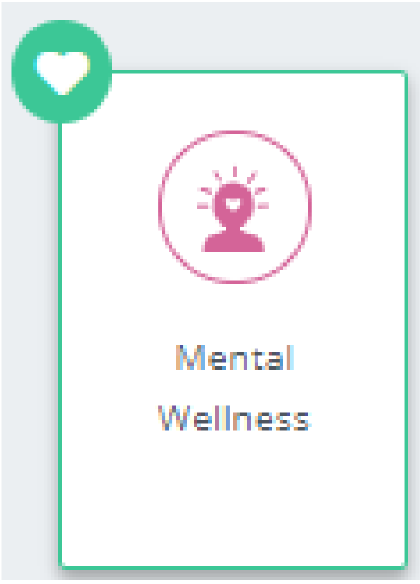
<u>Select the Causes You Want to Support</u>

For this next step, you're asked to indicate the causes you're passionate about. This information will help Get Connected inform you of the organizations in your community that support the same causes.



Note: You have the option to skip this step by clicking to complete the registration and continue, as shown above.

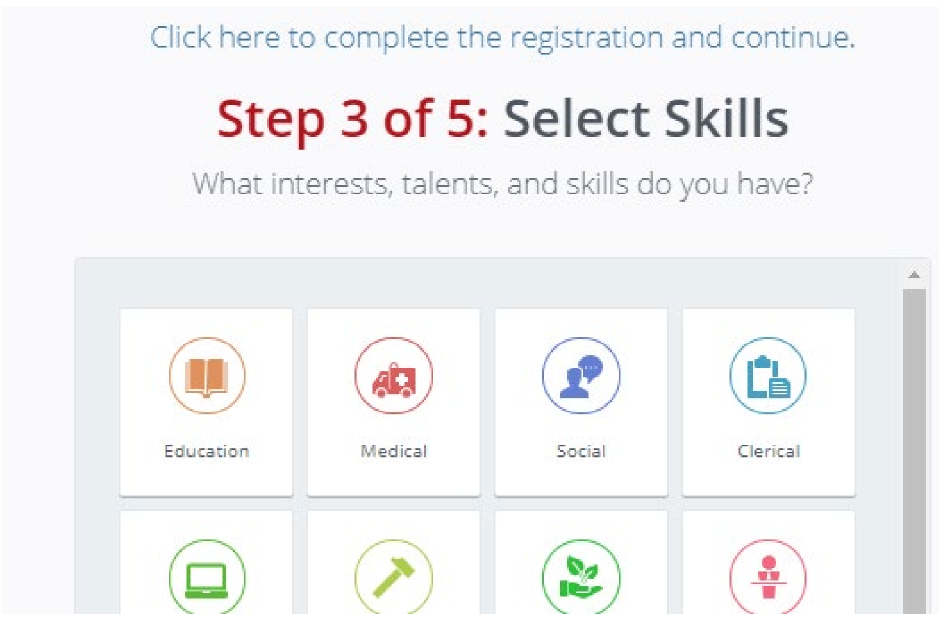
When you select a cause, it will be highlighted with a heart.



Click the "CONTINUE TO NEXT STEP" to **Continue**.

<u>Select Skills</u>

For this next step, you're asked to indicate your skills that you can use in volunteering. This will help Get Connected inform you of the volunteer opportunities in your community that could use your skills.



Once you have selected at your interests, click the **Continue button**.

Fan an Agency

You're not required to fan an organization as part of sign up, but you'll want to fan any organizations that you're interested in supporting through volunteerism. Once you've fanned an organization, you'll receive emails whenever that organization posts new opportunities.

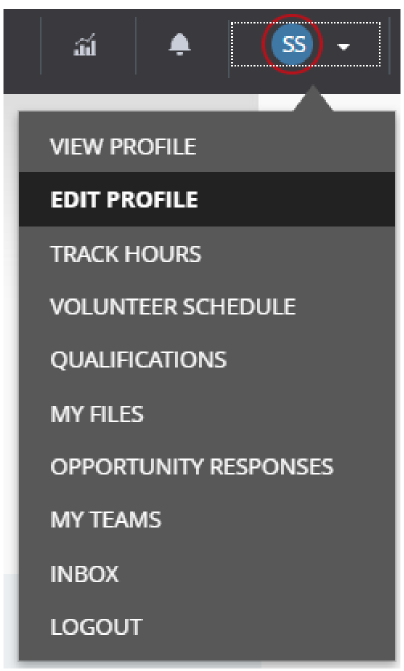
To fan an organization, click on it. Once you've selected it, the organization box is highlighted and shows a heart.

Once you have fanned one or more organizations, click the button to **Continue**.

... And You're Done!

Click the **Continue** button to go to your Dashboard.

To update your profile at any time, including your password, click on your initials at the top, then select "Edit Profile"



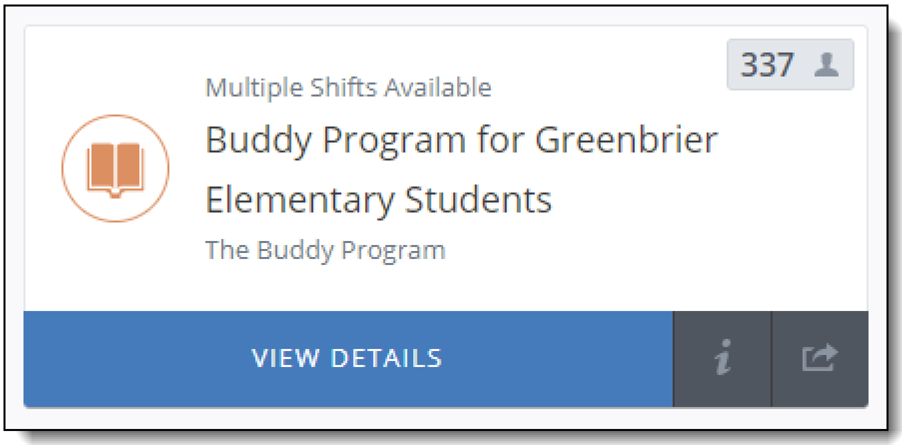
From this page you can add or edit any facet of your profile.

Once updated be sure to click the update button below sections you edit.

Responding to Opportunities

Once you've found the right volunteer opportunity, it's easy to respond to it and let the agency know that you'd like to volunteer.

To access the opportunity-information page, click the **View Details** button for the need (shown below).



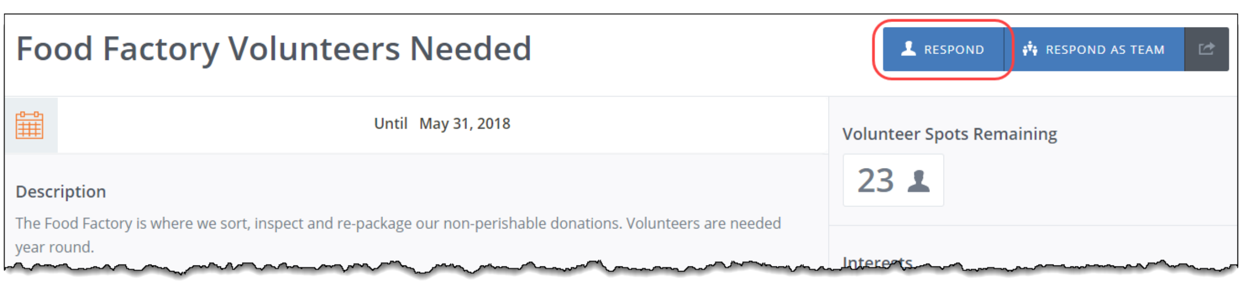
The opportunity-information page provides additional details about the volunteer opportunity.

All opportunities include the option to respond individually (provided that registration for the opportunity has not been closed and the opportunity isn't full). Some needs may also include the option to respond as a team.

Responding Individually to a Non-shift Opportunity

To respond individually (not as a team) to a opportunity that does not have multiple shifts:

1. Click the **Respond** button, located in the top right-hand corner of the opportunity-information page.

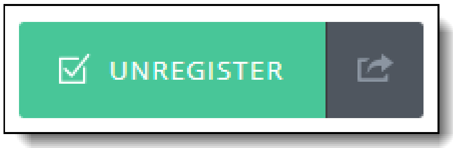


Note: If you do not see a **Respond** button, check out the end of this document for other potential buttons and their meanings.

2. On the response page that is displayed, you can type any additional notes for the organization manager. If other questions have been added for this opportunity, you may be required to answer them.

3. Click **Submit Opportunity Response**.

You are returned to the opportunity-information page, and the **Respond** button is replaced by an **Unregister** button.



You'll also receive an email confirmation your opportunity response, and the organization manager for the opportunity will be notified that you have signed up.

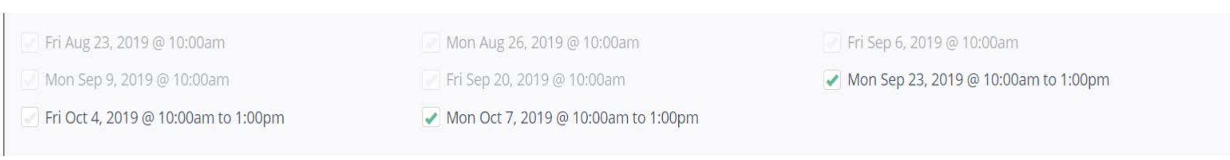
<u>Responding Individually to a Shift Opportunity</u>

If a volunteer opportunity has multiple shifts available, you'll need to select one or more shifts before completing your need response. When you click on the opportunity-information page, you'll see a list of shifts, along with the option to **Respond Individually**.

To respond individually (not as a team) to one or more shifts of a need:

1. Click **Respond** button described previously.

2. Select the shift(s) you want to volunteer for. Note that past shifts are shown in faded text and cannot be selected. Also note that you can see the day of the week for shifts, making it easier for you to select the days you want.

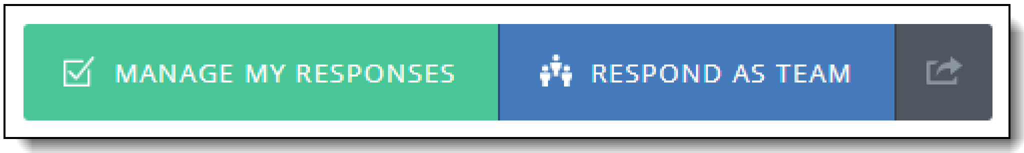


3. You can also choose to "Respond to All Shifts" by moving that toggle to YES. Be careful when using this option when many shifts are available, so that you do not overextend yourself.

4. Below the shift-selection area, you can type any additional notes for the organization manager. If other questions have been added for this opportunity, you may be required to answer them.

5. Click **Submit Opportunity Response**.

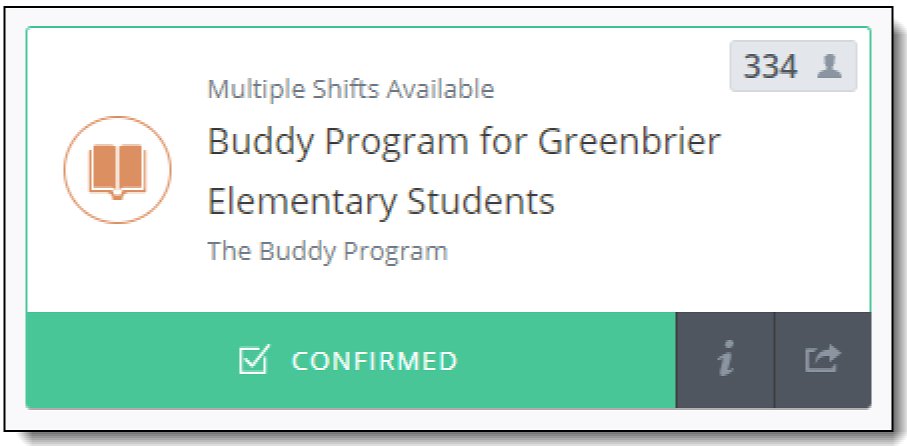
You are returned to the opportunity-information page, and the **Respond** button is replaced by a **Manage My Responses** button, which you can click to update a response or unregister from a shift.



You will also receive an email confirming your opportunity response, and the Organization manager for the opportunity will be notified that you have signed up.

Note: You can unregister for an opportunity or shift at any time, as long as the need is in the future.

Back in the opportunity listing, the **View Details** button is replaced with a **Confirmed** button.



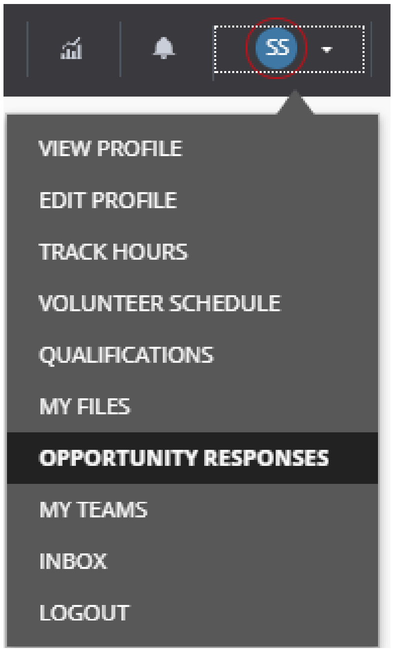
Unregistering from a Need

You can unregister from a volunteer opportunity as long as the opportunity is in the future.

Unregistering as an Individual

To unregister from a need or shift:

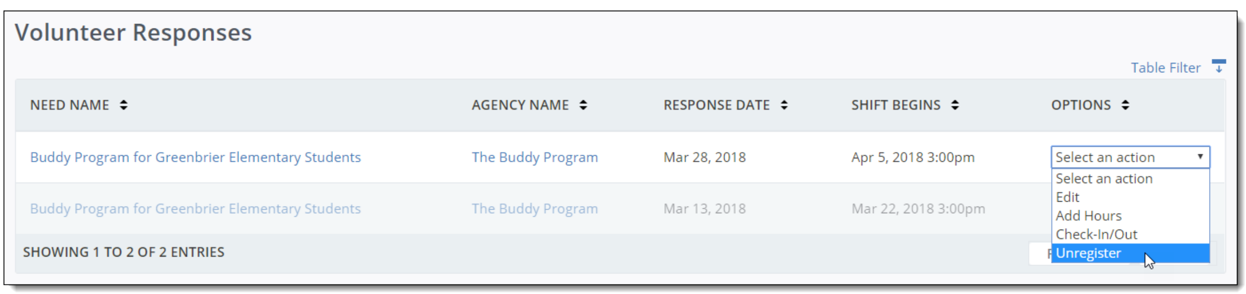
1. From your profile menu, click **Opportunity Responses**.



Your **Volunteer Responses** table lists all of your past volunteer responses.

Note: Expired needs are shown in faded text with a gray background. You can click on any active, current need to view the need description.

2. Find the need, and then click **Unregister** from the **Options** dropdown. (Click image for a larger view.)



Volunteer Responses

Table Filter

NEED NAME	AGENCY NAME	RESPONSE DATE	SHIFT BEGINS	OPTIONS
Buddy Program for Greenbrier Elementary Students	The Buddy Program	Mar 28, 2018	Apr 5, 2018 3:00pm	Select an action
Buddy Program for Greenbrier Elementary Students	The Buddy Program	Mar 13, 2018	Mar 22, 2018 3:00pm	

SHOWING 1 TO 2 OF 2 ENTRIES

3. Click **Yes** to confirm your unregistration.
   Warning: If you have already submitted volunteer hours for the opportunity or shift from which you're unregistering, those hours will no longer appear in your hours record or on your volunteer resume.

You can also unregister from a need by opening opportunity-information page and clicking the **Unregister** button.

Response Button: Other Text

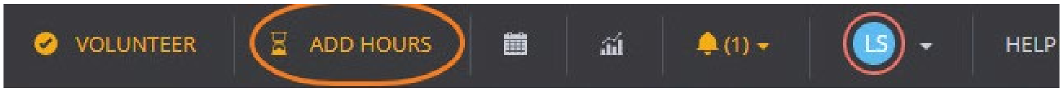
Depending on the opportunity capacity and restrictions, you may see a button other than the individual and team response buttons when viewing a opportunity-information page. Other button possibilities are shown below.

Button	**Description**
CLOSED	The open registration period for this opportunity has ended, and registration is no longer open.
FULL	The opportunity has met its volunteer capacity, and the organization is no longer taking volunteers for it.
WAITLIST	The opportunity (or shift) has met its volunteer capacity, but a waitlist is available. Click **Waitlist** to be added to the waitlist; the button will change to read **Added to Waitlist**, and you will get a confirmation that you have been added. To remove yourself from a waitlist, click the **Added to Waitlist** button. **Note:** The waitlist option is not available for team sign-ups.
QUALIFICATION NEEDED	Qualifications are required in order to respond to the opportunity

Logging Hours

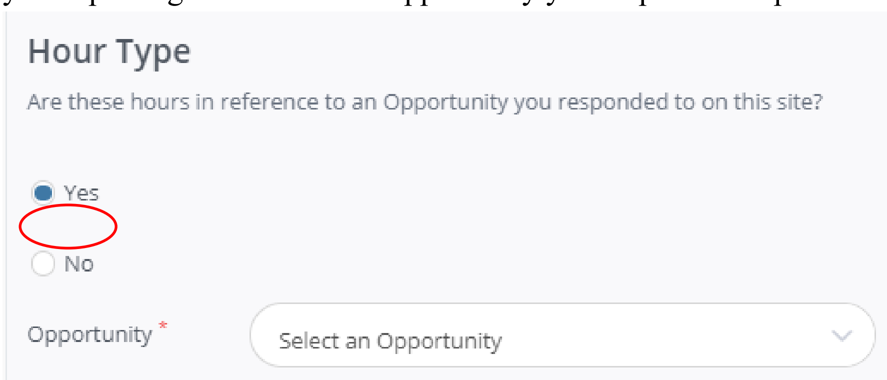
Logging Hours for a Posted Opportunity

1. Log into Get Connected.
2. Click the **Add Hours** button at the top of your screen to open the **Track Hours** page.

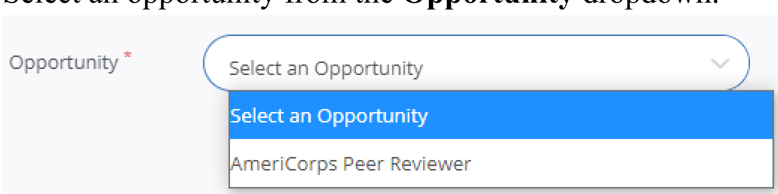


Note: Alternatively, you can click on your profile dropdown (located where the blue circle is in the image above) and select **Track Hours**, and then click **Add Hours**, located under the **Volunteer Hours** heading**.**

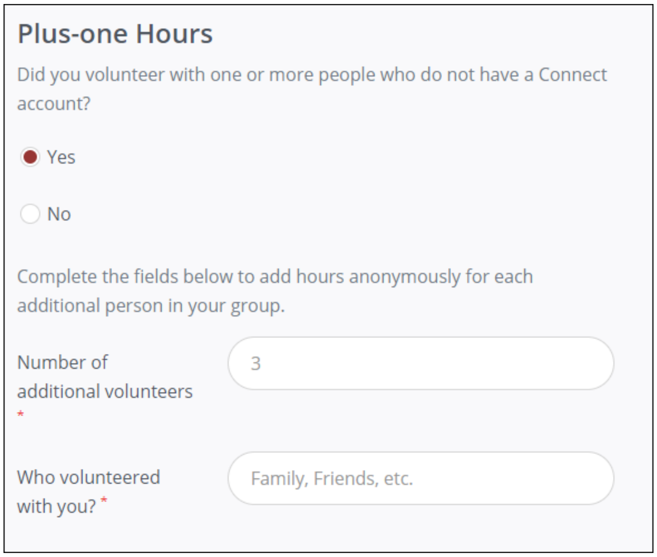
3. Click **Yes** under the **Hour Type** heading. (By clicking **Yes**, you indicate that the hours you're posting are related to a opportunity you responded to previously on this site.)



4. Select an opportunity from the **Opportunity** dropdown.



5. Enter the hour details, including the date and number of hours.
6. Complete all other **Hour Details** fields that apply.
7. If other people who are not registered volunteers joined you for the volunteer opportunity, you can add plus-one hours to account for their time. If you select the **Yes** radio button, you will see additional questions.

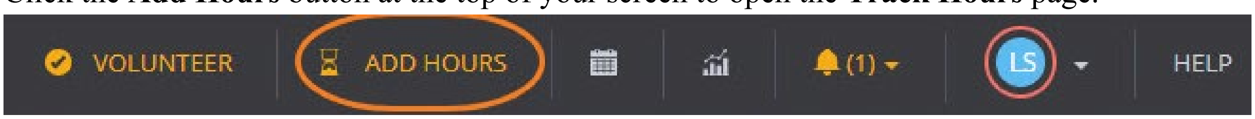


8. Click **Submit Hour Entry**.

<u>Logging Individual Volunteer Hours</u>

"Individual hours" are hours that are not associated with an opportunity response in Get Connected. Some Get Connected sites require that volunteer hours be related to an opportunity response, but some sites allow posting of "individual hours." If your site allows this, follow the instructions below to log your hours.

1. Log into your Connect site.
2. Click the **Add Hours** button at the top of your screen to open the **Track Hours** page.



Note: Alternatively, you can click on your profile dropdown (located where the blue circle is in the image above) and select **Track Hours**, and then click **Add Hours**, located under the **Volunteer Hours** heading**.**

3. Click **No** under the **Hour Type** heading to indicate that the hours are *not* related to a previous opportunity response on your Connect site. You will be required to provide the email address of someone who can verify your individual hours.
4. Complete all applicable fields under the **Individual Details**, **Hour Details**, and **Description** headings.
5. Click **Submit Hour Entry**.

A record of these hours is displayed on both your volunteer hours record and your volunteer résumé. In addition, your volunteer résumé will display the location/organization you entered, the date, the number of hours, and other data (if provided).

Editing Your Hours

You can edit your volunteer hours as long as they have not yet been approved. Both traditional and individual hours can be edited by the volunteer who submitted them.

To edit your hours:

1. Log into and click on your profile dropdown in the top right-hand corner of your site.
2. Select **Track Hours** to open the **Track Hours** page.

Note: Alternatively, you can click the **Volunteer Hours** area of your dashboard, located just below the **Welcome** message.

3. The **Track Hours** page displays your previously submitted hours.

DATE	DETAILS	HOURS	MILES	TYPE	STATUS
Jun 22, 2017	Food Sorters Needed Higher Ground	2.00	2	GC	
Jun 19, 2017	Greeter Needed on Monday Afternoons Grasty Community Center	3.00	0	GC	
Jun 3, 2017	Rocky Ridge Trail Individual	4.00	14	GC	

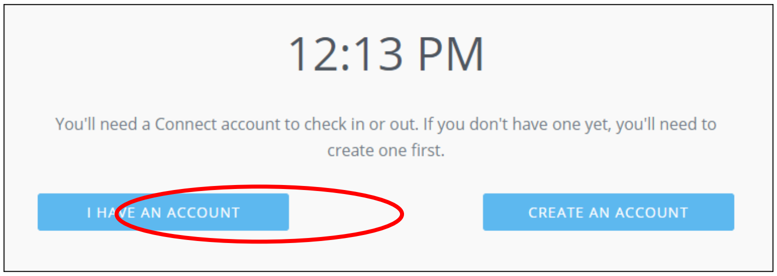
4. Click the pencil icon to edit hours. Note that the approved hours do not have a pencil icon and cannot be edited.
5. Make your changes.
6. Click **Update Hour Entry**.

To edit hours after they have been approved, you should contact the organization.

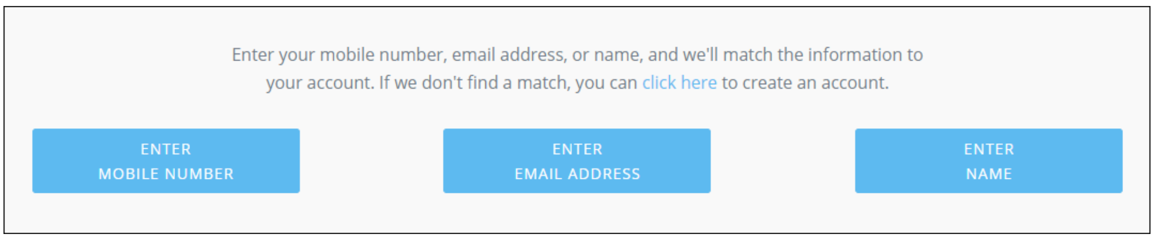
Using a Check-In Kiosk

To Check-In:

1. Click “I HAVE AN ACCOUNT” to log in.

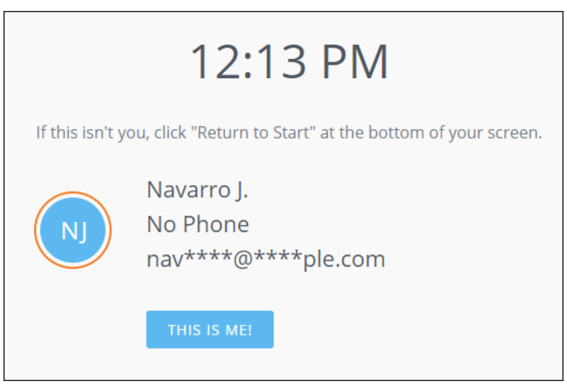


2. Select which method you’d like to use to find your account

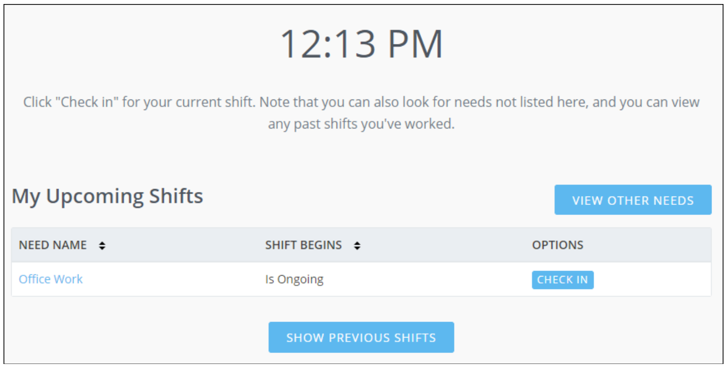


Note: For your phone number, you are not required to include hyphens. For you name, you can enter first name, last name, or both. Keep in mind that the system cannot identify you if it finds multiple matches. For example, if you enter "Dave" as your name, the system will probably indicate that there are multiple matches and that it needs more information. If the system cannot identify you by number or name, you will be asked to enter an email address.

3. Enter your information and click Submit. You'll be asked to confirm the match to your account. If you've entered your phone number or uploaded a profile picture, that data will also be displayed.

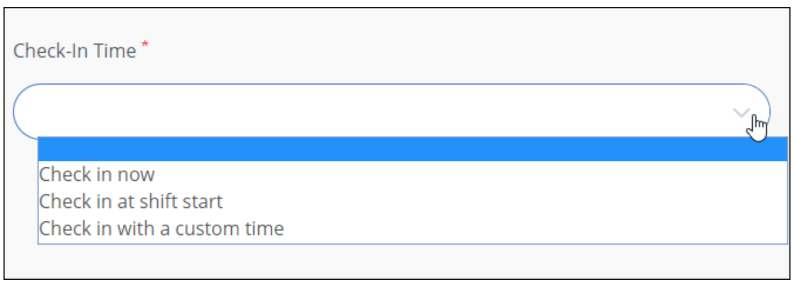


4. Click the This is Me button. You'll be taken to the My Upcoming Shifts page, which lists the opportunities you have responded to.

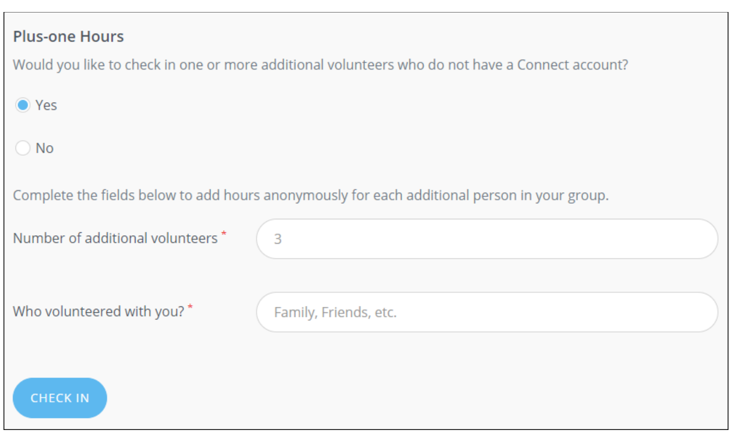
5. 

Note: The kiosk only shows opportunities that occur within the upcoming week.

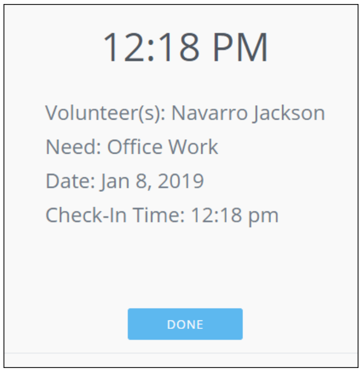
6. Click Check In for the applicable opportunity. You'll be taken to a brief description of the opportunity, with the option to select a check-in time.



7. Select Check in now to check in at the time displayed at the top of the Kiosk page. Select Check in at shift start to check in at the scheduled start time for the shift. Select Check in with a custom time to enter a custom date and time.
8. If you brought additional people with you who do not have an account on a Connect platform, you can add them by selecting the Yes button under Plus-one Hours. If you select Yes, you will see additional questions.



9. Click Check In. You'll see a confirmation message with your information.



10. Click Done. The screen will return to the Kiosk landing page.

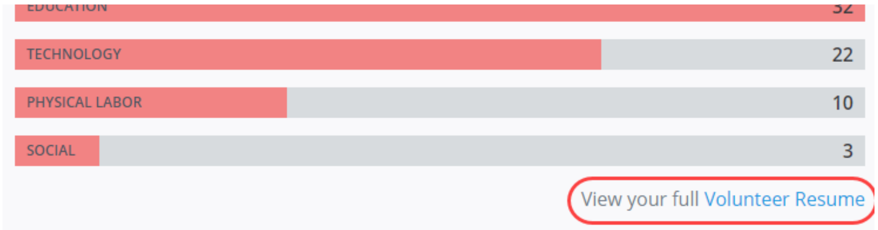
<u>To Check-Out:</u>

The process for checking out of an opportunity is identical to checking in, whether you check out individually or as a team. If you don't check out of an opportunity, the set hours for that opportunity will be attributed to your volunteer hours. For example, if you check into a two-hour shift but forget to check out, you'll have 2.00 hours added to your volunteer hours.

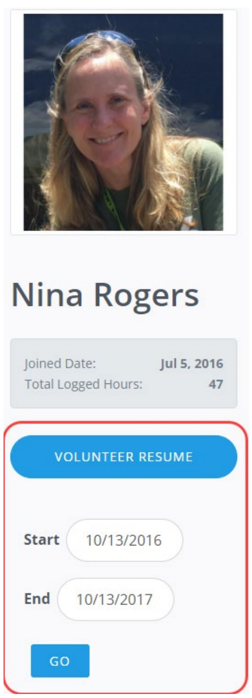
Volunteer Resume

You can download a document that contains all of your volunteering on the site. There are two ways to get there. The first:

1. From your volunteer dashboard, click the View your full Volunteer Resume link, located right below the Hours by Skill graph.



This link takes you to the résumé portion of your volunteer profile, located right below the avatar area.



2. Select the Start and End dates of the date range you want the résumé to show. By default, the range shows the past year up to the current date.

3. Click Go. A printable PDF of your résumé will be generated.