Volunteer User Guide:

An Introduction to Fundly Connect™

Visiting Nurse Association

Fundly Connect™ Volunteer User Guide
Table of Contents

Look for the "👍" symbol for best practices and tips.

Getting Started

In order to gain access to opportunities published by **Visiting Nurse Association (VNA) of Texas**, volunteers must first create a Fundly Connect™ account. Once you create an account, you will be able to apply and schedule for VNA's opportunities and do a lot more!

Create a Fundly Connect™ Account

1. Go to VNA's public site **https://connect.fundly.com/Site/vnavolunteers/** and click **Register** under the "Volunteers" tab.
2. Enter your email address and click **Go**.
   a. If you wish to sign up through a preexisting social media account instead, click the desired platform (e.g., Facebook or Google), and enter your login information.
3. Under "Basic Info.," create a username and password for your account.
4. Enter your first and last name, phone number, birthdate, address as well as the name and mobile number of your emergency contact. Click **Next**.
5. Under "Additional Info", fill in your emergency contact relationship, preferred name, available training days and other information they may require. Click **Next**.
6. Under "Agreements", you will be asked to electronically sign one or more agreements required by VNA. Do this by entering your name in the field provided for each agreement. Click **Register**. You will receive a confirmation email containing the username and password that you set.

Log in to your Fundly Connect™ Account

1. Go to VNA's public site **https://connect.fundly.com/Site/vnavolunteers/** and click the **Volunteer/Team Login** button or you can also login via Fundly Connect™'s home site **https://connect.fundly.com/** by hovering over the **Sign In** button then selecting **Volunteer/Team Login**.
2. On the Login pop up, enter your username and password, and click **Login**.
   Note: If you wish to login with a social media account instead, click the appropriate icon under "Login using social media."

Navigate Fundly Connect™

My Dashboard

Your Dashboard is the main page and hub of all of your activity on Fundly Connect™. From here, you can review information related to opportunities in which you are involved and access other areas of the site.

To access the Dashboard after logging in from VNA's public site, click on **your username** at the top of the screen, then click on **Dashboard** in the dropdown menu. If you are on Fundly Connect™'s home site, click on the **person icon** at the top of the screen, then click on **Dashboard** from the selection. Or, if you are already inside the portal, click the **Main Menu**, then click on **Dashboard**.

In the Dashboard, you will see the following:

> **Overview**
> - Details about Hours Logged, Opportunities Worked, and Opportunities Pending Approval
>
> **My Opportunities**
> - Details about opportunities in which you are involved
>
> **Recommended Opportunities**
> - Opportunities that most closely match your personal preferences
>
> **Time Off History**
> - Displays list of scheduled time offs

Team Dashboard (For Team Captains/Members)

The Team Dashboard is where you'll find all your activities as part of a team. If you are linked to multiple teams, you should be able to switch between the different team dashboards.

To switch to your Team Dashboard after logging in from VNA's public site, click on the **Team Dashboard** tab at the top of your dashboard.

In the Team Dashboard, you will see the following:

> **Summary**
> - Total count on Hours Logged, Opportunities Worked, Member(s) and Team Member(s) Pending Approval by the team
>
> **Team Information**
> - Information on the Team such as Type, Captain Details, Co-Captain Details and other configurations.
>
> **Manage Opportunities**
> - Details about opportunities in which the team is involved
>
> **Manage Members**
> - Details about the members of the team
>
> **Recommended Opportunities**

- Opportunities that most closely match your team's personal preferences

Time Off History

- Displays list of scheduled time offs of the team

You can check out our tutorial on Teams by clicking this link: https://support.fundly.com/hc/en-us/sections/115001814468-Meals-on-Wheels

The Main Menu

To access other areas of the Fundly Connect™ site, use the Main Menu. To access it, click the **Main Menu** icon at the top right of the screen.

In the Main Menu, you will see the following:

Dashboard

- Return to the Dashboard

Manage Documents

- Upload, view, and share documents with your associated organizations

Search Preferences

- Narrow down the opportunities that searches return by setting preferences such as location, skills, availability, and age group

My Profile

- Update or add details to your personal profile

My Volunteer Calendar

- View your scheduled volunteer opportunities in a calendar format

Credentials

- Update your username or password

Key Guide

The following icons appear throughout Fundly Connect™.
Note: In some cases, the icon image will be a slight variation of the image included in this table.

Icon	Icon Name	Function
☰	Main Menu	Provides access to other pages in the portal
🖼	Account Menu	View account details, get support, or log out
⬤	Slider	Turns a feature on (green) or off (gray)
✉	Envelope	Opens email and communication tools
⊖	Remove	Removes a page or item
⊕ ➕	Add	Adds a page or item
ⓘ	Information	Provides a description

Customize your Account

Set your Search Preferences

To get search results that are customized to your personal interests, availability, age, etc., you can set your search preferences. These preferences will apply to all searches that you conduct when logged in to your account.

1. From the **Main Menu**, click **Search Preferences**.
2. Under "Distance," select the maximum distance from your zip code that you are willing to travel to volunteer.
3. Under "What Would You Like To Do," use the dropdown menus to select the Causes, Skills, and Activity Types in which you are interested.
4. Under "Appropriate For," select the age group in which you fall.
5. Under "Programs," select the programs in which you are interested. These are the programs that are under VNA.
6. Under "When Are You Available," use the grid to select the days of the week and times of day (morning, afternoon, and/or evening) when you are available to volunteer.

    👆 Keep your profile up-to-date for best results. Be sure to edit your availability if it changes.
7. Under "Who Would You Like to Serve," select the Age Group(s), Gender, and Population(s) that you are interested in serving.
8. Under "My MOW Preferences", select the Organization, Location(s), and Route(s) that you are willing to take on.
9. Click **Save**.

Complete your Profile

You may supplement or edit the information provided when you created your Fundly Connect™ account by completing your profile. Doing so will also simplify the application process when applying to opportunities. Changes made to your profile do not affect your search preferences.

1. From the **Main Menu**, click **My Profile**.
2. From here, you can change or update details already provided, such as:
    a. Name
    b. Address
    c. Causes: Click the **+** icon. Check the boxes next to the items that interest you. Click **Save**.
    d. Skills: Click **Add New**. Check the boxes next to the items that interest you. Click **Save**.
3. If desired, you can also add additional information, such as:
    a. Gender
    b. Birth Date
    c. Profile Picture
    d. Additional Email Address: Click **Add New**, then enter the email address.

    e. Additional Phone Number: Click **Add New**, then enter the phone number.

    f. Communication Preferences: Elect to receive emails from Fundly Connect™.
Note: The text feature is currently in development stages and therefore unavailable. To ensure that you receive communication from Fundly Connect™ and VNA, include email as a communication preference.

    g. Reminder Notification Preference: Elect to receive separate notifications regarding each opportunity in which you are involved (**Receive All Notifications**) or one notification a day regarding all of the opportunities in which you are involved (**Receive Single Notification**).

4. When finished, click **Save and Next**.
5. To add or update your Emergency Contact, enter or edit his or her name, email, phone number, and address. Click **Save and Next**.
6. To link your Fundly Connect™ account to your social media account(s), select the social media type from the dropdown menu, then enter the associated URL. Click **Save**. To link your account to additional social media sites, repeat this process.

Search and Apply for Opportunities

To ensure that your account settings and preferences are applied to your searches, log in to your Fundly Connect™ account before conducting a search.
Note (For Team Captains): If you are searching, applying, scheduling or logging hours for an opportunity as a Team, please refer to our tutorial for Team Captains by clicking this link:
https://support.fundly.com/hc/en-us/articles/115006258007-Team-Feature-For-Captain-

Search for Opportunities – Basic

Basic searches automatically apply the preferences you set in the [Set your Search Preferences](#) tutorial above.

1. On VNA's public site, click the **Find An Opportunity** from the menu or the '**Search**' button under 'Search Volunteer Opportunities' section. This will open VNA's complete list of opportunities.
2. Click the **View** button to the right of any opportunity that interests you to view details about the opportunity. To return to your search results, click **Back**.

Search for Opportunities – Advanced

Advanced searches override your previously set search preferences.

1. On VNA's public site, under "Search Volunteer Opportunities," click **Advanced Search**.
2. Click **Show Advanced Search**.

3. To refine your search, enter any or all of the following information:
   a. Keyword(s): E.g. animals, elderly
   b. Address: Address or zip code of the area you wish to volunteer near
   c. Search for Virtual Opportunity(ies): Check the box to activate
   d. Date Range: Date range during which you wish to volunteer
4. Then, enter any or all of the following information:
   a. When are you available: Days of week and times of day you'd like to volunteer
   b. What would you like to do: Organizations, causes, skills, and activity types
   c. Who would you like to serve: Age, gender, and population of those served
   d. "Appropriate for" age-range: Age-range of the volunteer
   e. Program(s): Specific VNA programs with which you'd like to volunteer
5. Click **Search,** and a list of opportunities will appear.
6. Click the **View** button to the right of any opportunity that interests you to view details about the opportunity. To return to your search results, click **Back**.

Apply for an Opportunity

1. If you wish to apply for an opportunity, click the **Apply** button (to the right of the opportunity in the search results screen, or at the bottom of the opportunity details screen).
2. If you have not done so already, you will be prompted either to log in to your existing account, or to create one.
   a. To log in, enter your username and password and click **Login**.
   b. To create an account, click **Signup** and follow steps 3-9 from the Creating a Fundly Connect™ Account tutorial above.
3. Once you are logged in, you will be taken to the application form for the opportunity. Depending on how the form has been configured by VNA, you may simply have to submit your application, or you may be asked to answer questions specific to the opportunity.
   a. If prompted, enter any missing information in the fields provided, such as emergency contact information, phone number, and birth date.
   b. At the bottom of the page, you may be asked to electronically sign one or more agreements required by VNA. Do this by entering your name in the field provided for each agreement.
   c. If prompted, click **Save and Next**.
   d. Click on **Submit Application** to submit your application for the opportunity.
4. If a training session is required for this opportunity, you may be prompted to sign up for it.
   a. If you were not prompted to sign up for training, continue to step 5 below.
   b. To complete this process at another time, click **Do It Later** and refer to the Sign up for Orientation and Training tutorial.
   c. To complete this process now, follow steps 3-8 from the aforementioned tutorial.
5. You will be prompted to share this opportunity on your social media account(s). To do so, click the **Share With...** link. To decline, click **Close**.
6. To be brought to your Dashboard after applying, click **Go to Dashboard**.

Note: The opportunity will now appear under "My Opportunities." Look under the "Next Step" column to see if there are any additional steps required by you or the organization for your application to be completed.

Check the Status of an Application

1. To view the status of your application, go to your Dashboard.
2. Look for the opportunity under "My Opportunities."
3. Look under the "Next Step" column. The following may appear:
   a. Pending Approval: Your application has not yet been accepted by the organization. You must wait for the organization to approve you.
   b. Pending Orientation & Training: You must complete training session(s) before volunteering. If you have not yet signed up for training, follow the Sign up for Orientation and Training tutorial.
   c. Pending Attendance: You have signed up or been assigned to a training session, but you have not attended it or the organization has yet to marked your attendance.
   d. Scheduling: You have yet to schedule a shift. Follow the Schedule a Shift tutorial.
   e. Log Hours: You have been approved, completed all required training, and scheduled a shift. Follow the Log Hours for an Opportunity tutorial.
   f. Closed: You won't be able to proceed because this opportunity has already ended.
   g. Full: You won't be able to proceed because this opportunity has reached its full capacity.
4. To contact the organization with any follow-up questions, follow the Communicate with an organization tutorial.

Sign up for Orientation and Training

An organization may require volunteers to attend orientation or training sessions before they can volunteer. To find out if this is a requirement of an opportunity to which you applied, go to your opportunities and look under the "Next Step" column for the words "Pending Orientation & Training."

Note: If "Pending Approval" appears instead, you must wait for the organization to approve you for this opportunity before proceeding. If no training is required and you have been approved, "Scheduling" will appear and you can proceed to the Schedule a Shift tutorial.

1. From the Dashboard, go to the "My Opportunities" section and find the opportunity for which you wish to schedule an orientation or training session.
2. Under the "Next Step" column, click on **Pending Orientation & Training**.
3. In the "Training" dropdown menu, select the desired training session.
4. In the "Location" dropdown menu, select the desired location, or select "Default."
5. In the "Shift" dropdown menu, select the desired shift. If multiple shifts are available, click each shift to view details regarding its schedule, then select your desired shift.

6. In the "Date" dropdown menu, select the desired date when you'd like to complete the session.
7. If done, click **Save**. If there are multiple training or orientation sessions required by the organization, click **Save & Add New** instead, then repeat the process.
8. Your status for this opportunity will now say "Pending Attendance." Before scheduling a shift for this opportunity, you must first attend all required training sessions.

An organization may allow volunteers to cancel their scheduled training session for an opportunity. To check, follow the steps below.

1. From the **Main Menu**, click **My Volunteer Calendar**.
2. Select the desired training session from the "Opportunity" dropdown menu.
3. To delete your RSVP to the training session, click the **remove icon** on the date of the session, then click **OK**. If no icon appears, you cannot delete the session so you must contact the organization.

Schedule a Shift for an Opportunity

Schedule a Shift

To volunteer for an opportunity, you must first set a schedule and shift.

Note: You must be approved by your organization and attend all scheduled training sessions before scheduling to volunteer.

1. From your Dashboard, go to the "My Opportunities" section and find the opportunity for which you wish to configure a schedule.
2. Under the "Next Step" column, click on **Scheduling**.
   Note: If "Scheduling" does not appear, consult the Check the Status of an Application tutorial to learn why.
3. In the schedule configuration screen, select the Venue, Route(s), Shift, and Position for which you wish to schedule.
4. The remaining scheduling options will differ based on the opportunity. Dates and times will default to the schedule set for the opportunity and the shift you selected above, if applicable.
5. Choose to set your schedule by "Day of Week" or by "Date," if applicable. Use "Day of Week" to set a different schedule for different days of the week. Use "Date" to set a schedule for a specific date or dates.
6. Use the "From Date" and "Till Date" fields to indicate the date range during which you are available to volunteer, if applicable.
7. Use the "From Time" and "Till Time" fields to indicate the time of day you are available to volunteer, if applicable.

   ☞ You should always check with an organization before indicating a time that differs from the shifts or time frame set for the opportunity.

8. When done, click **Save**.
9. To configure an additional shift for this opportunity that differs from the one just configured, click on **Save & Add New**, and repeat. If you are done, click **Close**.

Delete or Edit a Schedule

1. From your Dashboard, go to the "My Opportunities" section.
2. Click on **Edit/View Schedule** for that opportunity.
3. On editing: Click **Edit** next to the desired schedule. Make the desired changes, then click **Save**. Click **Close**.
4. On deleting, click:
   - 4.1 **Delete:** This will delete the entire schedule as well as all of the hours associated with it.

   👍 If possible, only delete schedules for which you have not worked or logged hours.
   - 4.2 **Delete Future Occurrence:** This will only delete all future dates which means that existing hours associated with this schedule will be kept.
5. Click **OK**. Click **Close**.

Log Hours for an Opportunity

Fundly Connect™ allows volunteers to keep a record of the time they have spent volunteering by logging their hours.

👍 Use the "Log Hours" tool to keep records for volunteering requirements, award consideration, and personal reference.

1. From the Dashboard, go to the "My Opportunities" section and find the opportunity for which you wish to log hours.
2. Under the "Next Step" column, click on **Log Hours**.
   Note: If "Log Hours" does not appear, consult the [Check the Status of an Application](#) tutorial to learn why.
3. In the "Log Details" screen, select the Assignment for which you wish to log hours.
4. Next to the desired date(s), enter the number of hours worked and a description of the work.
5. Click on **Save & Close**.
6. Hours logged by volunteers will remain logged under "Pending Hours" and must be approved by the organization or coordinator before the hours are confirmed.

Scheduling Time Off

The Time Off feature allows volunteers to schedule a "leave" while at the same time cancelling all scheduled opportunities on those dates. This will also inform the organization that you are unavailable on those dates so they won't schedule you.

👍 Use the "Time Off" only when temporarily taking a time off from volunteering.
1. On the Dashboard, click on the **Schedule Time Off** found at the top right of the screen.
2. Select which type of Time Off (e.g. Vacation) you're scheduling. The selection will differ depending on your associated organization(s).
3. Set the "From" and "To" dates which will cover the dates of your time off.
4. The "Reason" field is optional. Click **Next**.
5. If you have volunteer schedules that fall within the Time Off dates, it will display those impacted opportunities and you'll have to click **Confirm and Proceed**.
   Note: For MOW opportunities, the driver can assign a partner driver to take over the impacted schedules. Check out our tutorial on Time Off on this link:
   https://support.fundly.com/hc/en-us/sections/115001814468-Meals-on-Wheels
6. After the Time Off is saved, it will cancel the volunteer schedules and you will find this Time Off under your "Time Off History".

Communicate with an Organization

Send Outgoing Communication

1. From the Dashboard, go to the "My Opportunities" section and find the opportunity associated with the organization with which you wish to communicate.
2. Under the "Send Email to Coordinator" column, click on the **envelope icon**.
3. The "To" field will default to the email address of the coordinator for the opportunity.
4. If you wish to send this email to an additional recipient, enter the recipient's email address in the "CC" or "BCC" field.
5. In the "Subject" field, enter a subject for the email.
6. In the "Body" field, enter your message for the opportunity's coordinator. If desired, you can use the formatting options available.
7. If you wish to send a document or image with your email, click on **Click here OR Drop file here** in the "Attachments" field. Select the desired document from your computer.
8. When done, click **Send Email**.

View Incoming Communication

Use the method below to view incoming emails or replies to emails that you have previously sent.

1. Click **Inbox** at the top of the screen.
   Note: The number listed next to "Inbox" indicates new or unopened incoming communication.
2. A list of all incoming communication will appear.
3. To search for specific communication: Enter keywords in the search field and/or enter a date range in the From/To fields, then click **Filter**.
4. To review an email: Click on the email in the pane at the left of the screen. It will appear in the right pane.
5. To reply to an email: Click on the desired email. Then, click Reply, compose the email, and click Send.

Volunteer Coordinator View

Volunteers can be assigned as Coordinators to opportunities by their associated organizations. As Volunteer Coordinators, you are given the ability to perform administrative tasks on your own portal like schedule, as well as log and verify hours for volunteers assigned to your designated opportunity and location. You'll have your own database with volunteer, team and opportunity records.

You can check out our tutorial for Volunteer Coordinators by clicking this link:
https://support.fundly.com/hc/en-us/articles/221122887-Volunteer-Coordinator-Overview

Manage Associations

Associations are organizations with whom you have volunteered or for whom you have applied to volunteer. In this case, it will show you Visiting Nurse Association of Texas.

View Associations

1. From the Dashboard, click **My Associations**.
2. The resulting list shows you your association with VNA. Click on the name to view your association details (e.g. Agreements, Programs, Custom Datasets).
3. Click on the **View Public Site** link below the organization name to open their public site in a new tab.

Manage Documents

You can add documents and images to your account to share with Visiting Nurse Association of Texas.

👆 You can use this tool if you need an organization to sign forms for a service requirement, would like to share photos from a volunteer event, need to provide proof of certifications, etc.

Add a Document to your Profile

1. From the **Main Menu**, click **Manage Documents**.
2. At the bottom right corner of the screen, click **Add New Document**.
3. Add a description of the document.
4. Upload the document.
5. Select organization to share the document with by checking the appropriate box.
6. Click **Save**. Click **Close**.

Manage Documents

1. From the **Main Menu**, click **Manage Documents**.
2. Look for the desired document.
3. To share: Click **Share**. Select organization to share the document with by checking the appropriate box. Click **Save**. Click **Close**.
4. To stop sharing with the organization: Click the **X** next to the organization's name. Click **OK**.
5. To delete: Click **Delete** in the desired document's dropdown menu. Click **OK**. Click **Close**.

Edit your Username or Password

1. From the **Main Menu**, click **Credentials**.
2. To change username: Enter a new username. Click **Change Username**.
3. To change password: Enter your old password, new password, and confirm your new password. Click **Change Password**.

Log Out of your Account

1. From the Dashboard, click on the **account menu** at the top of the screen.
2. Click **Log Out**.

Unsubscribe from Fundly Connect™

If you no longer wish to receive email or notifications from Fundly Connect™, you can do so by adjusting your communication preferences.

1. From the **Main Menu**, click on **My Profile**.
2. Under "Communication Preferences," uncheck the boxes next to "Send Email".
3. While your account will still exist, you will no longer receive communication from Fundly Connect™ or VNA.
4. However, if you'd like to subscribe again, just do the reverse and check the boxes next to "Send Email".