FUNDLY CONNECT

Student User Guide:
An Introduction to Fundly Connect™

Fundly Connect™ Student User Guide
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Look for the "👍" symbol for best practices and tips.

Getting Started

In order to gain access to opportunities sponsored by your university and its partner organizations, students must first create a Fundly Connect™ account. Once you create an account, you will be able to search for opportunities that match your interests using keywords, zip codes, availability, and more!

Create a Fundly Connect™ Account

Note: Depending on how the university configured their signup process, some of the steps may not be available.

1. Go to your university's public site and click **Student** under the "Register As" 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, address and whatever information is required like birthdate and emergency contact information. Click **Next**.
5. Under "Causes," select the causes for which you are interested in volunteering. Click **Next**.

    👍 Not sure if you're interested in a particular cause? When in doubt, include it! Volunteering is a great opportunity to discover new things you may enjoy.

6. Under "Skills," check the boxes next to the skills you are interested in utilizing as a volunteer. You may select entire categories (e.g., Arts), or select individual items within a category (e.g., Crafts, Photography, and Dance).
7. Under "Courses", select the course you're currently enrolled in.
8. Under "Agreements", you may be required to sign agreements (e.g., photo release waiver, liability waiver).
9. After completing all steps, 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 your university's public site and click the **Student/Team Login** button.
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™

The Dashboard

The Dashboard is the main page and hub of all of your activities 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 your university's public site, click on **Go To Dashboard** at the top of the screen. Or, if you are already inside the portal, click the **Main Menu**, then click on **Dashboard**.

In the Dashboard, you will see the following tasks:

View Summary
- Displays details about Hours Logged, Opportunities Worked, and Opportunities Pending Approval

My Opportunities
- Displays details about opportunities in which you are involved

Volunteer Calendar
- Displays scheduled volunteer opportunities in a calendar format

Time Off History
- Displays list of scheduled time offs

Pledged Hours
- Displays list of pledged hours

Search Opportunities
- Opens your associated university's list of volunteer opportunities

Recommended Opportunities
- List of opportunities that most closely match your personal preferences

My Courses
- Displays details about courses in which you are enrolled

My Profile
- Opens your personal profile where you can add or update details

Username/Password
- Update username and/or password

Emails
- Directs to your inbox where you can compose, view and respond to emails

Go to Public Site
- Opens your associated university's public site

Logout
- Logout from your volunteer account

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

Search Preferences

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

My Volunteer Calendar
- View your scheduled volunteer opportunities in a calendar format

Directories
- Course Directory
- Faculty/Staff Directory
- Organization Directory

Manage Documents
- Upload, view, and share documents with your associated university/organization(s)

My Profile
- Add or update details to your personal profile

Credentials
- Update your username and/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 your associated university.
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. 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**. Alternatively, you can click **View/Update My Profile** from the task section.
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: To ensure that you receive communication from Fundly Connect™ and the university and organization(s) with whom you are involved, 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 an Emergency Contact, enter 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.

Search for Opportunities – Basic

Basic searches automatically apply the preferences you set in the Set your Search Preferences tutorial above.

1. On the university's public site, under "Search Volunteer Opportunities," enter any keyword(s) that show your volunteer interests (e.g. animals, elderly). To see all opportunities, leave this field blank or you can also click the '**Find An Opportunity**' button on the menu.
2. Enter the address or zip code of the area you wish to volunteer near.
3. Click **Search**, and a list of opportunities will appear.
4. 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 the university'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 university 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 the university or organization, 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 the university or organization. Do this by checking the boxes next to the agreements and entering your name in the field provided.
    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 the university or 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 university/organization. You must wait for the university/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 university/organization has yet to mark 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 had already ended.
    g. Full: You won't be able to proceed because this opportunity had reached its full capacity.
4. To contact the university/organization with any follow-up questions, follow the Communicate with an organization tutorial.

Sign up for Orientation and Training

A university or organization may require students 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 university or 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 university/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.

A university or organization may allow students 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 university/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 university/organization and attend all scheduled training sessions, if there's any, 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, 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 the university/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. 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 students 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 <u>Check the Status of an Application</u> 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 students will remain logged under "Pending Hours" and must be approved by the university/organization or coordinator before the hours are confirmed.

Scheduling Time Off

The Time Off feature allows students to schedule a "leave" while at the same time cancelling all scheduled opportunities on those dates. This will also inform the university/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 university/organization(s).
3. Set the "From" and "To" dates which will cover the dates of your time off.
4. The "Reason" field is optional.
5. Click **Next**.
6. 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**.
7. After the Time Off is saved, it will cancel the volunteer schedules and you will find this Time Off under your "Time Off History".

Directories

Directories display in detail the list of courses, faculty/staff and organizations you are associated with. These lists can be filtered by university and also by doing a search.

Course Directory
- List of courses and their course number, department, university, faculty and description.

Faculty/Staff Directory
- List of faculty/staff and their course/s, university, email, phone number and department.

Organization Directory
- List of organizations and their type, university, contact, email and address.

Communicate with a University/Organization

Send Outgoing Communication

1. From the Dashboard, go to the "My Opportunities" section and find the opportunity associated with the university/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. Alternatively, you can also click **Check/Compose Emails** on the task section.
   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**.

Unsubscribe from Fundly Connect™

If you no longer wish to receive email 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 any university/organization.

Manage Associations

Associations are universities or organizations with whom you have volunteered or for whom you have applied to volunteer.

View Associations

1. From the Dashboard, click **My Associations**.
2. The resulting list shows all of your associations. Click on the desired association to view its details.

Add an Association

1. From the Dashboard, click **My Associations**.
2. Click **Add Association**.
3. Search for the university.
4. Once found, click **Save And Associate**. Click **Close**.

Manage Documents

You can add documents and images to your account to share with your associated organizations and university.

👆 You can use this tool if you need a university/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 the university/organization(s) to share the document with by checking the appropriate boxes.
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 the university/organization(s) to share the document with by checking the appropriate boxes. Click **Save**. Click **Close**.
4. To stop sharing with a university/organization: Click the **X** next to the university/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**. Alternatively, you can click **Change Username/Password** on the task section.
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**.
3. Alternatively, you can click **Log out** on the task section.