



SERVE365

Step-by-Step Guide for Agency Managers

This guide will show you how SERVE365 can benefit you and how you can use each of its tools.

If you have any questions, please contact the Dan River Nonprofit Network at serve365@danrivernonprofits.org.

This version of the guide was created 7.25.2023. Always find the most recent version of this guide online at serve365.org/about-us!



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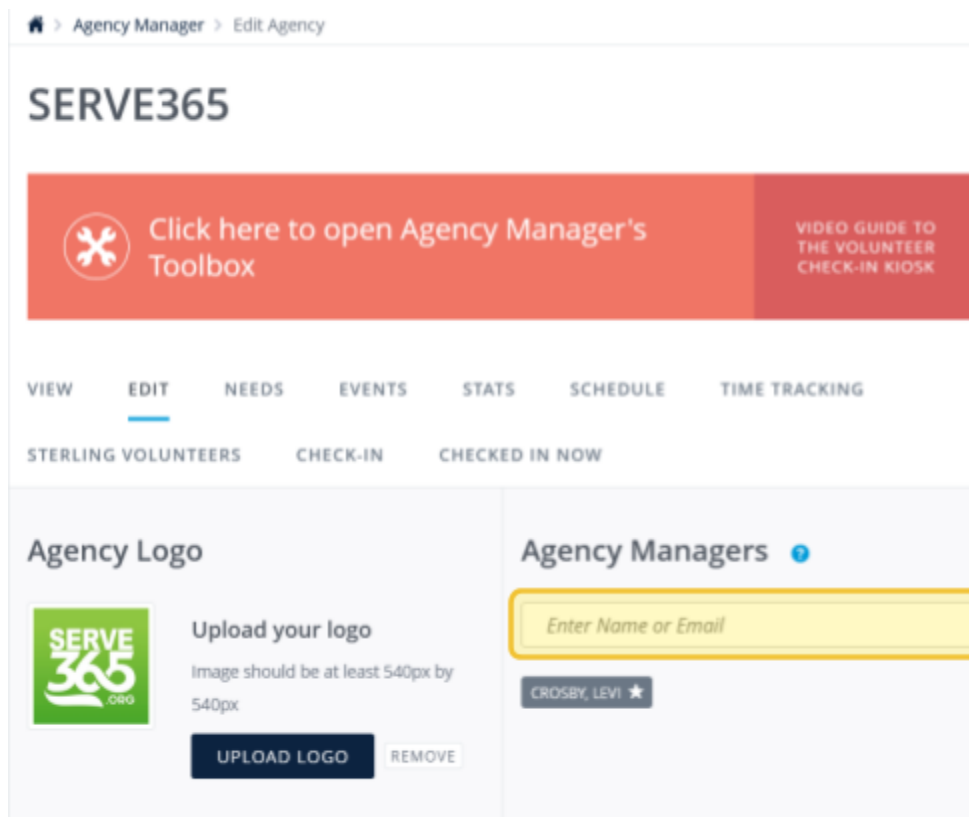
BECOMING AN AGENCY MANAGER



FOR AN EXISTING AGENCY

To become an agency manager for an existing agency, you will first need to visit serve365.org and create an account by clicking the SIGN UP button.

The site should walk you through several required steps. Remember to click the CREATE YOUR ACCOUNT/CONTINUE button at the bottom of each page!

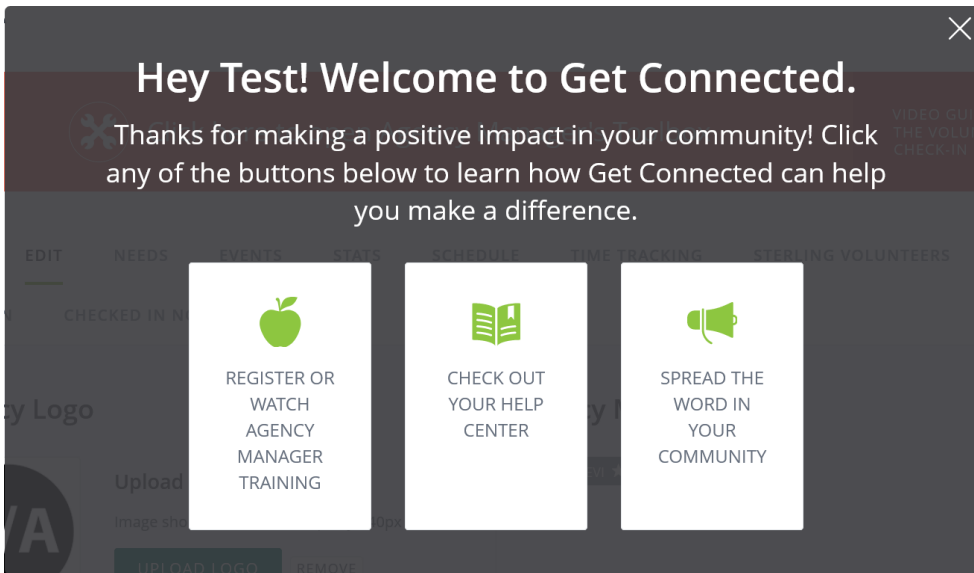


If you have an existing agency manager that you're replacing or joining, ask them to add you on the EDIT AGENCY page by entering your name or email in the Agency Managers box.

The starred manager is the primary agency manager, who can add and remove other managers. You can also change that from this page!

If your agency hasn't used SERVE365 in a while and your previous agency manager has left or doesn't remember their login, don't worry! Email us at serve365@danrivernonprofits.org, and we can get this part set up for you.



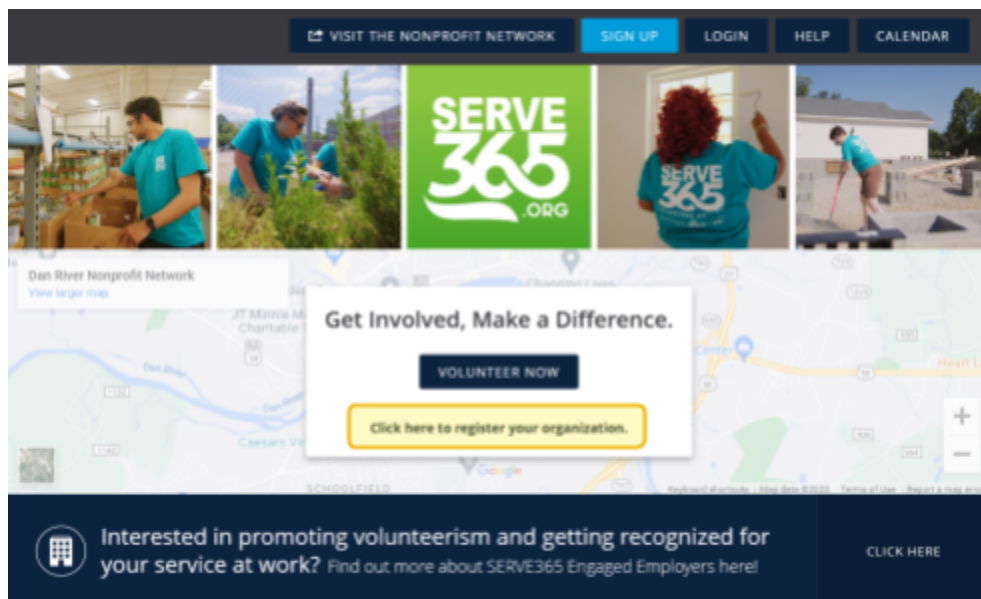


You should now receive an email (or notification on the site, if you've opted out of emails, although we don't recommend this, since it's easier to get updates if you keep emails on.) from SERVE365 to let you know you've been set as an agency manager.

Log in and get started!



BECOME AN AGENCY MANAGER



FOR A NEW AGENCY

Go to serve365.org and click the button under VOLUNTEER NOW, reading Click here to register your organization.

Sign Up Your Agency

Once your request is reviewed, you will receive an email with instructions on how to manage your profile.

Looking for the Volunteer sign-up form? [Click here.](#)

Agency Name (Required)

crosby@danrivernonprofits.org

Address Line 1 (Required)

Address Line 2

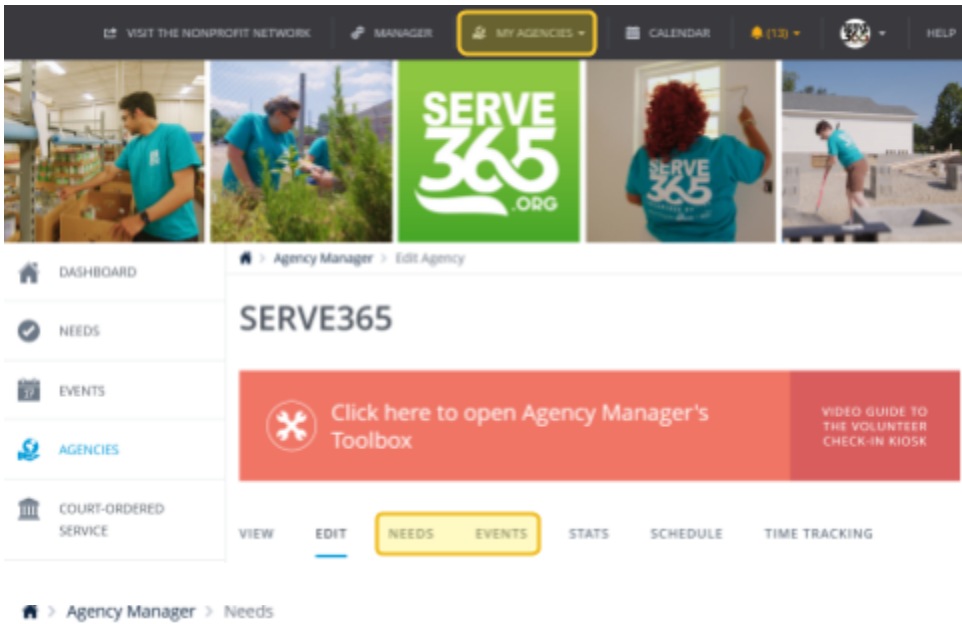
You should be taken to the SIGN UP YOUR AGENCY page, which will ask you to fill out the sign-up form.

At the bottom, click REQUEST ACCOUNT. We will receive a notification and likely approve your agency within the next couple days. If you come into the office to sign up, we can approve you immediately.



NEEDS AND EVENTS

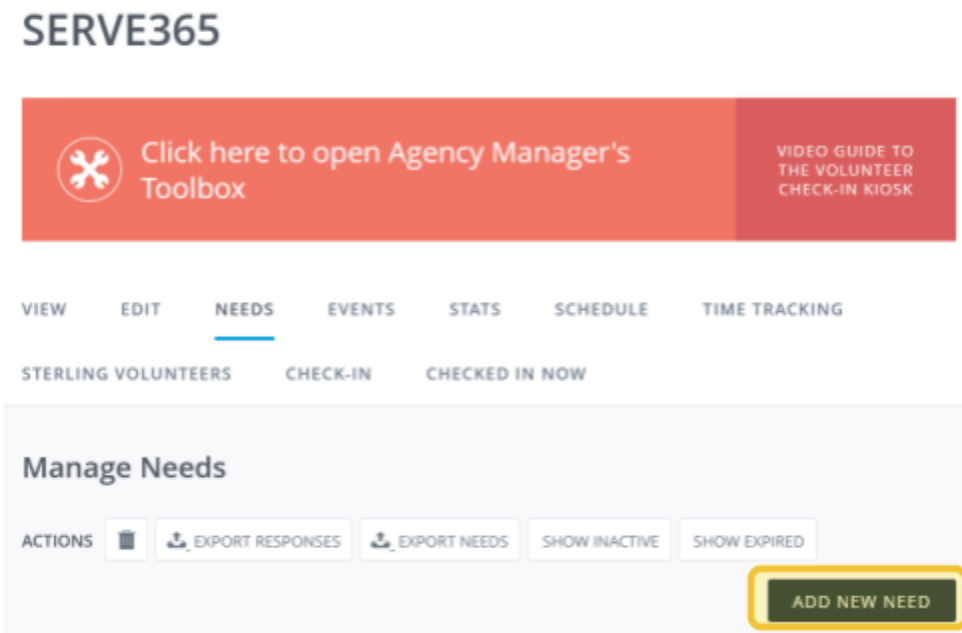
POST NEW NEEDS/EVENTS



Select the MY AGENCY button on the top navigation bar, which will take you to the EDIT AGENCY page. This should also be the page you'll first see when signing in.

From there, select the NEEDS or EVENTS tab. These pages are pretty much identical.

Once you're on the NEEDS or EVENTS page, scroll down to select the ADD NEW NEED/EVENT button.



Fill out your details on the page that pops up.

You can add as many INTERESTS as are relevant! More is better!

PRIVATE needs will only be visible to those who have a link to them. Use this for needs you intend to restrict to a set group you'll send the link to. PUBLIC needs will show up to everyone.

Create Need

Title * ?

Description * ?

Paragraph

B *I* U [A](#) [A](#) [A](#)

Privacy * ? ☒ Public ☐ Private

Duration * ?

Capacity ?

Hours * ?

Is Ongoing

Runs Until

Happens On

Multi-Date

Custom Shifts

Recurring Shifts

Initiative

Duration * ?

While creating your NEED, it will ask you what the DURATION is. If this is an ongoing need, i.e., it is a continuous need that your agency has and is not happening on a specific date, we recommend selecting the Ongoing Need INITIATIVE. It will add this banner asking volunteers to reach out to the agency manager about the timing of their first shift, since this need often does not have a concrete date or time attached. It will also add this reminder to the volunteer's email confirmation.

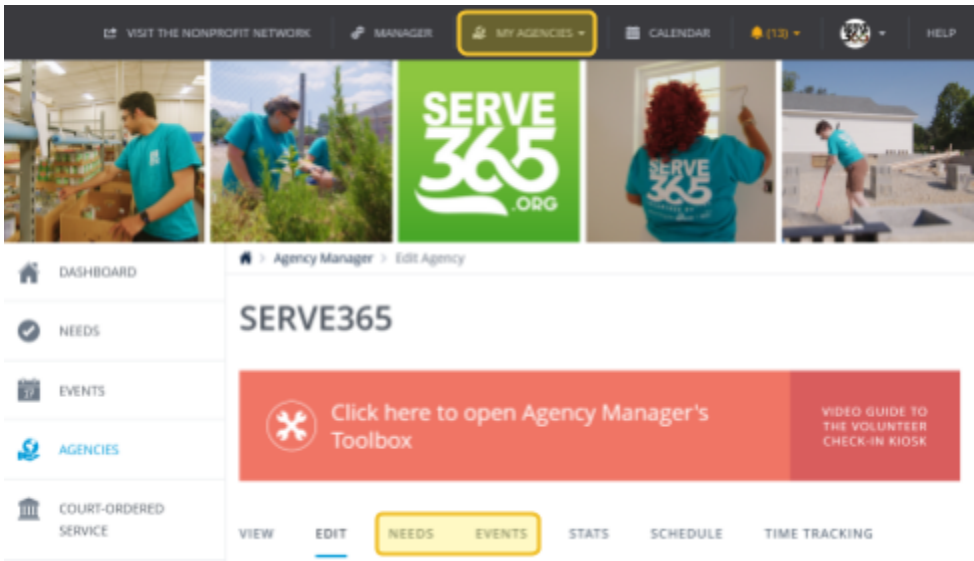
Once you're done filling out your details, click CREATE EVENT/NEED at the bottom of the page.

Ongoing Need

This need is ongoing, meaning the agency that posted it has a continuous need for volunteers to fill this position! We'd love if respondents to this need briefly contacted the agency that posted this need to discuss the timing of their first shift.



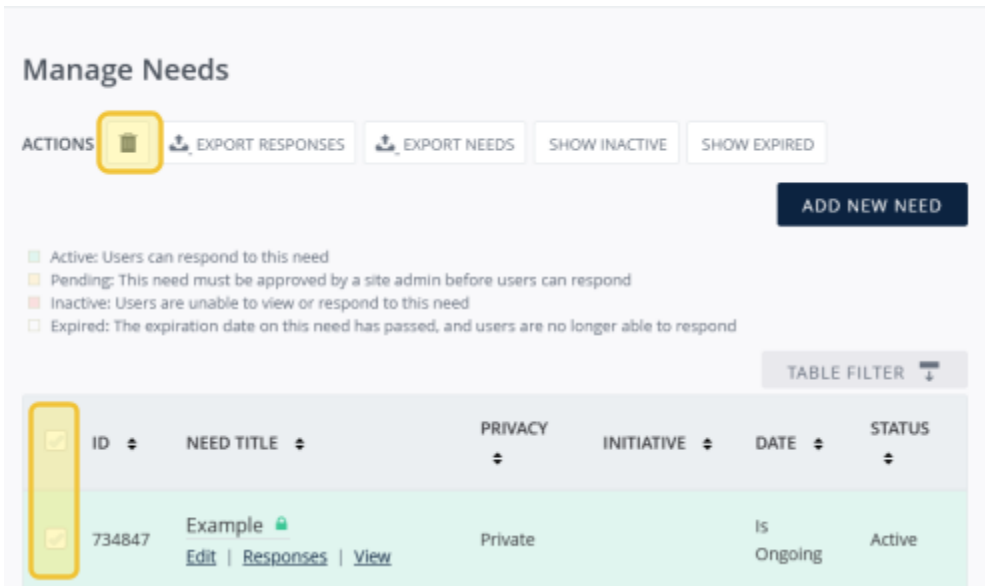
NEEDS AND EVENTS



MANAGE NEEDS/EVENTS

Select the MY AGENCY button on the top navigation bar, which will take you to the EDIT AGENCY page. This should also be the page you'll first see when signing in.

From there, select the NEEDS/EVENTS tab.



From here, you should be able to deactivate needs or events by selecting them with the checkboxes and then clicking the trashcan icon. Note that this will not get rid of associated hours!



Manage Needs

ACTIONS


[EXPORT RESPONSES](#)
[EXPORT NEEDS](#)
[SHOW INACTIVE](#)
[SHOW EXPIRED](#)
[ADD NEW NEED](#)

- Active: Users can respond to this need
- Pending: This need must be approved by a site admin before users can respond
- Inactive: Users are unable to view or respond to this need
- Expired: The expiration date on this need has passed, and users are no longer able to respond

[TABLE FILTER](#)

<input checked="" type="checkbox"/>	ID	NEED TITLE	PRIVACY	INITIATIVE	DATE	STATUS
<input checked="" type="checkbox"/>	734847	Example	Private		Is Ongoing	Active
		Edit Responses View				

Manage Needs

ACTIONS


[EXPORT RESPONSES](#)
[EXPORT NEEDS](#)
[SHOW INACTIVE](#)
[SHOW EXPIRED](#)
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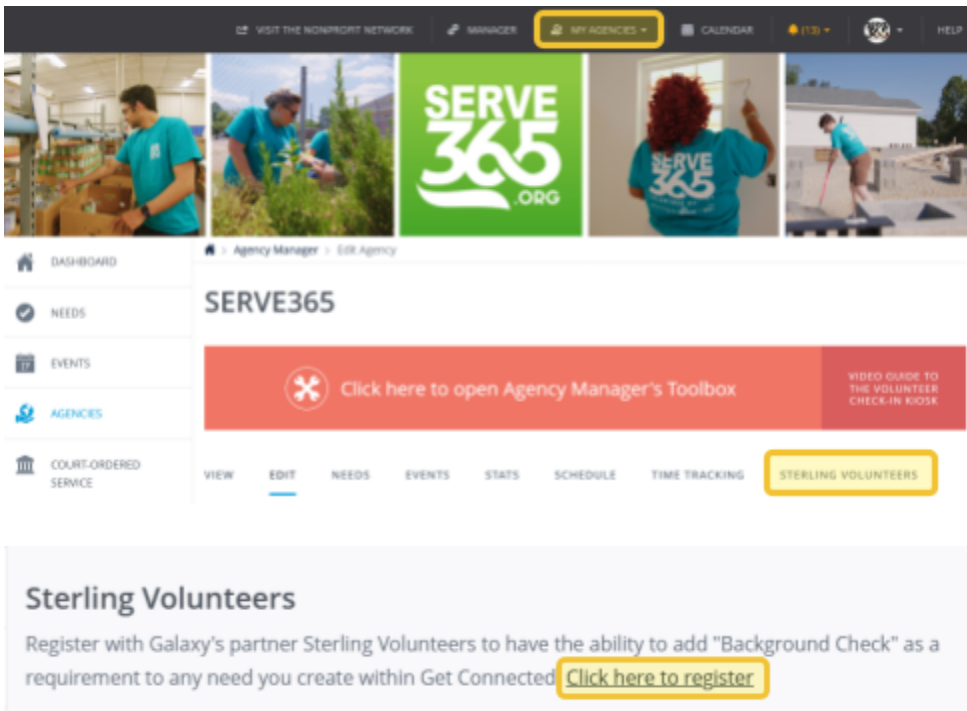
To edit needs or events, click the EDIT button underneath its name and make any updates that need to be made. Remember to scroll all the way to the bottom of the page and click UPDATE NEED/EVENT to save your edits!

To view all the people who have responded to your need or event, select it with the checkbox and click EXPORT RESPONSES/RSVPS.

This will download a spreadsheet of all the people who have responded to your need, as well as any notes they have attached to their response and their answers to the default need questions: *What is your t-shirt size; Please enter emergency contact information; and Are you responding to this need to fulfil court-ordered community service hours.*



BACKGROUND CHECKS



SERVE365 does not innately offer the ability to perform background checks on volunteers, but you can access this service by signing up with a third-party partner.

Click on MY AGENCY, and from there select STERLING VOLUNTEERS.

Once you're on the STERLING VOLUNTEERS page, you should see this, if you aren't signed up. Select the CLICK HERE TO REGISTER button to start signing up for the background check service.



Working Together to Create Safer Environments

Galaxy Digital Southeast and Sterling Volunteers have partnered to ensure organizations can efficiently onboard and screen trusted volunteers through our automated, streamlined integration. This will help increase your productivity, create a safer environment, and focus on what you do best – making a positive impact within your community.

Sterling Volunteers enables nonprofits to:

- ✔ **Increase Productivity** – Consolidate your technology needs and streamline efficiencies by integrating your background screening within Galaxy Digital's software solution to better manage your volunteer program with faster and more accurate reporting.
- ✔ **Make Informed Decisions** – Confidently deploy trusted volunteers who have been thoroughly vetted with quality, compliance-focused background checks and attract volunteers with the right skills or necessary attributes for your organization.



How can we help? Fill out the form and click submit to connect with us.

First Name*

Last Name*

Email*

Phone Number*

It will take you to this outside webpage, where you can register. Under VOLUNTEER MANAGEMENT SYSTEM, be sure to select Get Connected (that's the name of the software that SERVE365 uses!). Select SUBMIT at the bottom to begin your registration process with Sterling Volunteers.

Sterling Volunteers will set up a meeting with you to discuss pricing; they have two options that are about \$30-\$40 per background check.



Dan River Nonprofit Network
SERVE365 Guide For Agency Managers

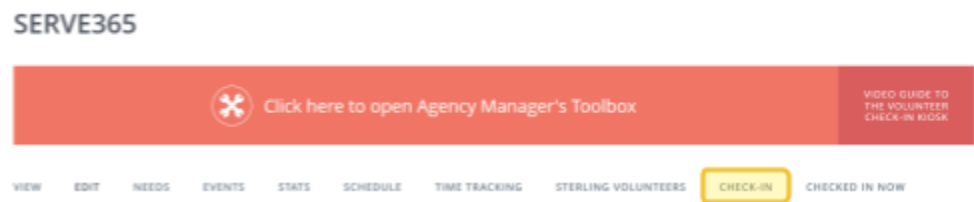
HOURS



CHECK-IN KIOSK

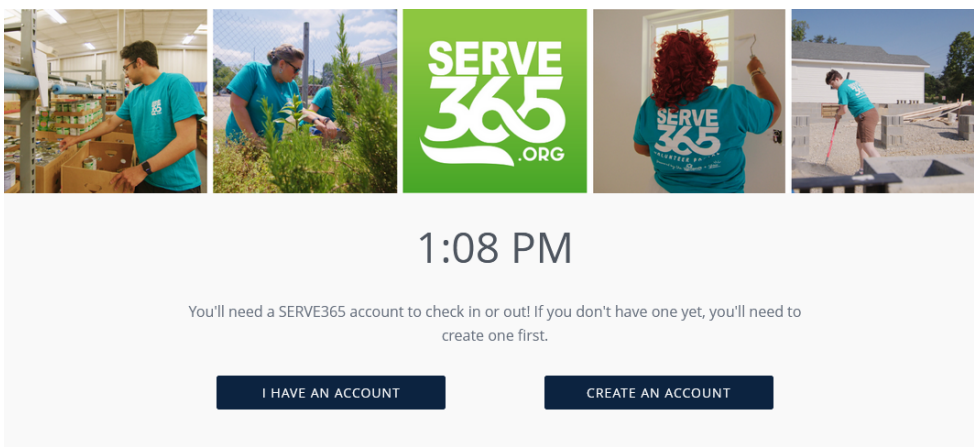
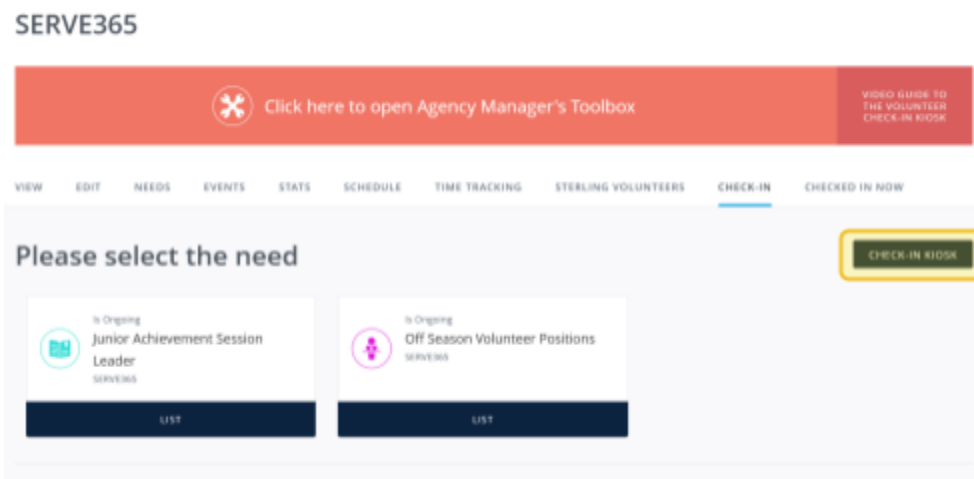
Select the MY AGENCY button on the top navigation bar, which will take you to the EDIT AGENCY page.

From there, select the CHECK IN tab.




From there, select the CHECK-IN KIOSK tab in the upper right corner.

You'll get a pop-up informing you that you'll be checked out when the kiosk launches. Select CONTINUE.



This is the CHECK-IN KIOSK! Your volunteers can sign in here and they'll see any NEEDS they've responded to on the page that this takes them to.





3:33 PM

Click "Check in" for your current shift. Note that you can also look for needs not listed here, and you can view any past shifts you've worked.

My Upcoming Shifts [VIEW OTHER NEEDS](#)

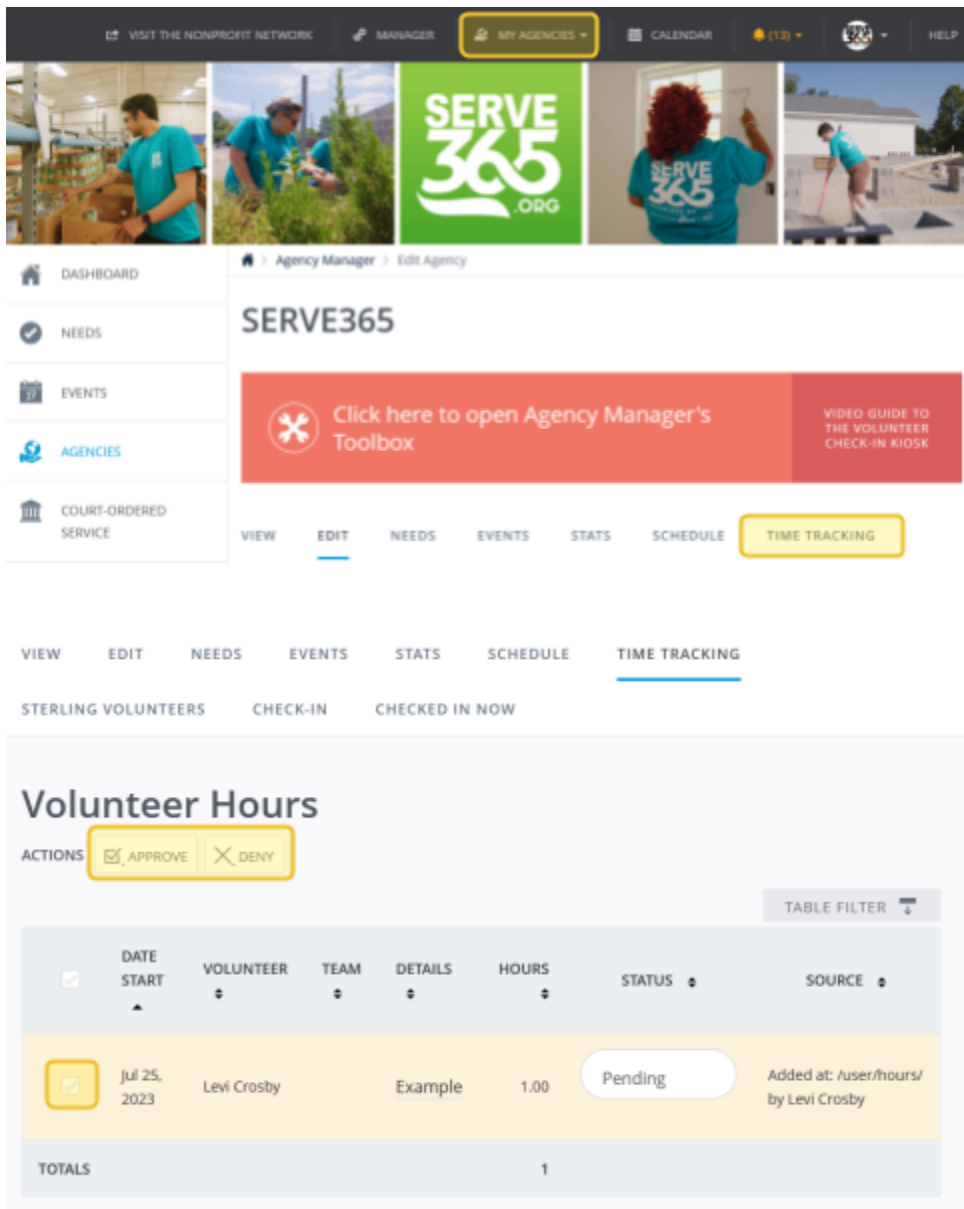
NEED NAME	SHIFT BEGINS	OPTIONS
Example	Is Ongoing	CHECK IN

[SHOW PREVIOUS SHIFTS](#)

If your volunteer is registered for a NEED, it'll show up when they log into their account on this homepage. If they're not registered for any NEEDS with your organization, they can click **VIEW OTHER NEEDS**, and see any other public NEEDS of yours and check in to those.



HOURS



The screenshot shows the SERVE365 Agency Manager interface. The top navigation bar includes links for 'VISIT THE NONPROFIT NETWORK', 'MANAGER', 'MY AGENCIES' (highlighted), 'CALENDAR', a notification bell with '13', and a 'HELP' button. Below the navigation bar is a banner with five images: a person in a warehouse, a person planting, the SERVE365 ORG logo, a person painting, and a person working on a structure. A left sidebar contains a menu with 'DASHBOARD', 'NEEDS', 'EVENTS', 'AGENCIES' (highlighted), and 'COURT-ORDERED SERVICE'. The main content area is titled 'SERVE365' and 'Agency Manager > Edit Agency'. It features a red banner with a wrench icon and the text 'Click here to open Agency Manager's Toolbox', and a red button labeled 'VIDEO GUIDE TO THE VOLUNTEER CHECK-IN KIOSK'. Below this is a horizontal tab bar with 'VIEW', 'EDIT' (underlined), 'NEEDS', 'EVENTS', 'STATS', 'SCHEDULE', and 'TIME TRACKING' (highlighted in yellow). The 'TIME TRACKING' tab is active, showing a 'Volunteer Hours' section with 'ACTIONS' for 'APPROVE' (checked) and 'DENY'. A 'TABLE FILTER' dropdown is present. The table has columns: 'DATE START', 'VOLUNTEER', 'TEAM', 'DETAILS', 'HOURS', 'STATUS', and 'SOURCE'. A single row is shown with the date 'Jul 25, 2023', volunteer 'Levi Crosby', team 'Example', hours '1.00', status 'Pending', and source 'Added at: /user/hours/ by Levi Crosby'. A 'TOTALS' row shows a count of '1'.

DATE START	VOLUNTEER	TEAM	DETAILS	HOURS	STATUS	SOURCE
Jul 25, 2023	Levi Crosby	Example		1.00	Pending	Added at: /user/hours/ by Levi Crosby
TOTALS				1		

APPROVE HOURS

Select the MY AGENCY button on the top navigation bar, which will take you to the EDIT AGENCY page.

From there, select the TIME TRACKING tab.

Scroll down to see a list of volunteer hours that have been put in for your approval by volunteers. Select them by the checkbox and then hit the APPROVE or DENY button, to confirm their volunteer hours.



HOURS

The screenshot shows the SERVE365 Agency Manager interface. The top navigation bar includes links for VISIT THE NONPROFIT NETWORK, MANAGER, MY AGENCIES (highlighted), CALENDAR, and HELP. Below the navigation bar is a banner with five images of volunteers. The left sidebar contains a menu with DASHBOARD, NEEDS, EVENTS, AGENCIES (highlighted), and COURT-ORDERED SERVICE. The main content area shows the 'SERVE365' logo and a red button that says 'Click here to open Agency Manager's Toolbox'. Below this is a tabbed interface with VIEW, EDIT, NEEDS, EVENTS, STATS, SCHEDULE, and TIME TRACKING (highlighted). The 'TIME TRACKING' tab displays a form for adding hours manually. The form is divided into two main sections: 'Hour Type' and 'Hour Details'. The 'Hour Type' section has a radio button for 'Need Response' and a dropdown for 'Need' with 'Example' selected. Below this is a 'Need Date' field set to 'ongoing'. The 'Hour Details' section has a 'Date Worked' field with a date picker, a 'Hours Worked' field with 'Example: 3.5', and a 'Miles Traveled' field. The 'Description' section has a text area with 'Brief Description'. At the bottom of the form is a 'SUBMIT HOUR ENTRY' button.

ADD HOURS MANUALLY

Select the MY AGENCY button on the top navigation bar, which will take you to the EDIT AGENCY page.

From there, select the TIME TRACKING tab.

Scroll down to where you can input hours.

Select the need and volunteer who you're adding hours for.

If you are logging anonymous hours, for example, if you have volunteers whose hours you wanted to track but they did not have accounts, select Anonymous User from the volunteer dropdown menu.

Fill out the date and hours worked fields, and hit SUBMIT HOUR ENTRY.

These hours will be automatically approved, as an agency manager is submitting them.



GLOSSARY

Agency: Any organization on the site. Agencies are able to list volunteer needs and events.

Agency Manager (Primary): The agency manager who is able to add and delete agency managers, in addition to being able to post needs and events, approve hours, etc. Every agency must have exactly one primary manager.

Agency Manager (Secondary): An additional agency manager that can do everything the primary agency manager can do except add and delete new agency managers. Agencies can have multiple secondary managers or no secondary managers.

Need: A volunteer shift that is posted by an agency on SERVE365. See your listed needs and who's responded to them under the NEEDS tab.

Event: An event hosted by a community nonprofit or other organization that is coming up. See who's RSVP'd to your events under the EVENTS tab.

Interest: You'll indicate interests in association with needs you post. Interests usually refer to specific skills that you're looking for for that specific volunteer need. Every need posted must have at least one associated interest.

Cause: Agencies will indicate causes that they support on their agency page. Agencies must list at least one cause that they work to benefit.

Fanning: Users can "fan" an agency to get notified of upcoming events and volunteer opportunities that they post. You can see how many fans your agency has by going to the STATS tab and selecting MORE.

Sterling Volunteers: This is a third-party site that SERVE365 partners with that allows agencies to pay a fee for background checks on their volunteers. If your agency signs up with Sterling Volunteers, the REQUIRE BACKGROUND CHECK option when posting a need will become available.

