

## Volunteer Referral system ‘How to’ notes for not-for-profit organisation users

### Contents

How to register your organisation with Volunteer Nelson to advertise roles.....	1
How to create a user account to advertise roles and manage volunteer referrals.....	1
How to edit your organisation details .....	2
How to add a new role.....	2
How to make changes to an existing role .....	3
A role has expired, how do I republish it? .....	3
Volunteer Referrals.....	4

### How to register your organisation with Volunteer Nelson to advertise roles

Registering your not-for-profit with Volunteer Nelson brings a number of benefits. It will enable you to post volunteer roles online and get volunteers referred to you, manage your roles and keep a track of volunteers referred to each of your roles. You are also welcome to take advantage of our resources for Managers of Volunteers, low cost training and support, attend our regular networking events and use our free community e-newsletter to promote your news.

Contact the team at [admin@volunteernelson.org.nz](mailto:admin@volunteernelson.org.nz) or call 03 546 7681 and we'll set up your organisation in the system.

### How to create a user account to advertise roles and manage volunteer referrals

Once we've set up your organisation in the system, you can create a user account for each volunteer manager within your staff.

1. Follow the 'log in' link from the top right corner of our home page <https://www.volunteernelson.org.nz/>
2. Now you are at the landing page for the volunteer referral system. Save this as a bookmark on your browser.
3. Select **SIGN UP** in the top right, then **Signing up as a member of an organisation** (when you log in subsequently, click on the Sign In link)

## Register now

We have a large variety of volunteer roles for you! You need to register to find out more about these roles. Once registered, volunteers can see and amend their information at any time.

Signing up as a member of an organisation? [Click here.](#)

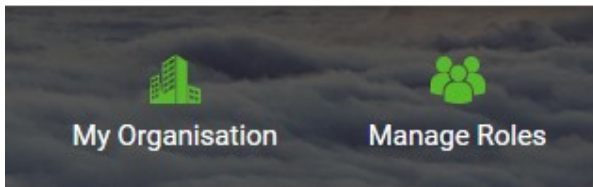


4. Complete the form then **Submit**. Try to avoid pressing the submit button multiple times as this confuses the system. If you're not sure the form has gone through, scroll up to the top of the page to see a green box with the confirmation in.
5. You will be sent an automated e-mail asking you to follow a link to verify your e-mail address. Once you've done that, Volunteer Nelson administrators will finalise your profile and let you know when it's ready to use.

## How to edit your organisation details

1. 'Sign In' with your e-mail and password.

Settings   Logoff



2. **Settings** – Click Settings if you want to change your password, or change your e-mail address.
3. **My Organisation** – Click this to change any information about your organisation such as open hours, main contact person etc. Make any amendments or changes then click **Update**.

## How to add a new role

1. Sign In, and select Manage Roles
2. Scroll down the page where your roles are listed and select the Add New button beneath your existing roles
3. Enter all the role details, including an expiry date and the user responsible (you should get a list of all of your organisations users that are set up in our system). Once you're done, click Create. This saves the role but **doesn't** publish it. At this stage you can easily come back and make any changes before requesting publication (see below).  
*(To add a new user – follow instructions on page 1 How to create a user account....)*
4. From Manage Roles where you see the list of roles for your organisation, find the new role you've just created and click the 'i' button.
5. **Click Request Publication.**

Request  
Publication

REQUEST PUBLICATION

6. **Note:** All new role publication requests are moderated by VN administrators prior to approval. You will be notified of our decision by e-mail.

## How to make changes to an existing role

1. From Manage Roles where you see the list of roles for your organisation, find the new role that's expired and click the 'i' button.

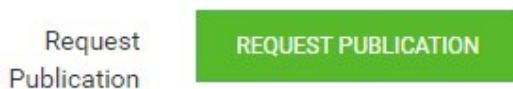
### Role Status Options:

'Unpublished' means what it sounds like, the role info is there but it's not published and therefore not viewable by volunteers.

'Withdraw' un-publishes a currently published role (but leaves it on the system so you can re-publish it at a later date).

'Request Publication' does just that. All role publication requests are moderated by VN administrators prior to approval. You will be notified of our decision by e-mail.

2. Make any changes to the role, including changing the expiry date to a future date.
3. **Click Request Publication.**



4. **Note:** All role publication requests are moderated by VN administrators prior to approval. You will be notified of our decision by e-mail.

## A role has expired, how do I republish it?

1. From Manage Roles where you see the list of roles for your organisation, find the new role that's expired and click the 'i' button.
2. Make any changes to the role, including changing the expiry date to a future date.
3. **Click Request Publication.**



4. **Note:** All role publication requests are moderated by VN administrators prior to approval. You will be notified of our decision by e-mail.

## Volunteer Referrals

This is a two-stage process.

Firstly, Volunteers who are registered in the system can browse through all published roles. They can create a shortlist of up to three roles they are interested in, and they can also click to **Request a Referral** to a role.

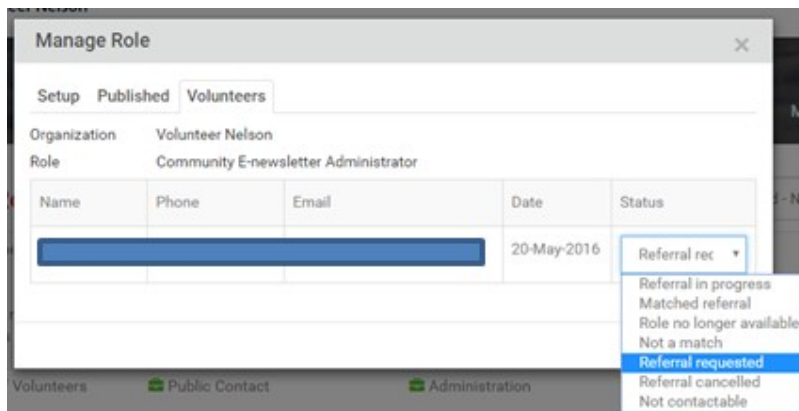
When a volunteer requests a referral to your role, both the User Responsible (for that role in your organisation) and the volunteer will receive an automatic e-mail to exchange contact details.

It is then up to you to make contact with the volunteer. If they do not hear from you within a few days, they may well get in touch with you.

Secondly, the system will send you regular reminders for you to update the **referral status of volunteers** who have requested a referral to your roles. To do this:

1. Sign In
2. Manage Roles
3. Click the 'i' button for the appropriate role
4. Click the Volunteers tab
5. Select the appropriate Status using the drop down menu.
6. Repeat for all volunteer referrals, which might be across multiple Roles.

**Note:** *Volunteers can also indicate on their user profiles that they have committed to a specific Role.*



If you have any problems, or would like some training on using the software, please give us a call on (03) 546 7681 or e-mail [admin@volunteernelson.org.nz](mailto:admin@volunteernelson.org.nz)