

Volunteer Portal Instructions

Milwaukee County
(414) 488-6500 VolunteerMilwaukee@Eras.org
Waukesha County
(262) 549-3348 VolunteerWaukesha@Eras.org

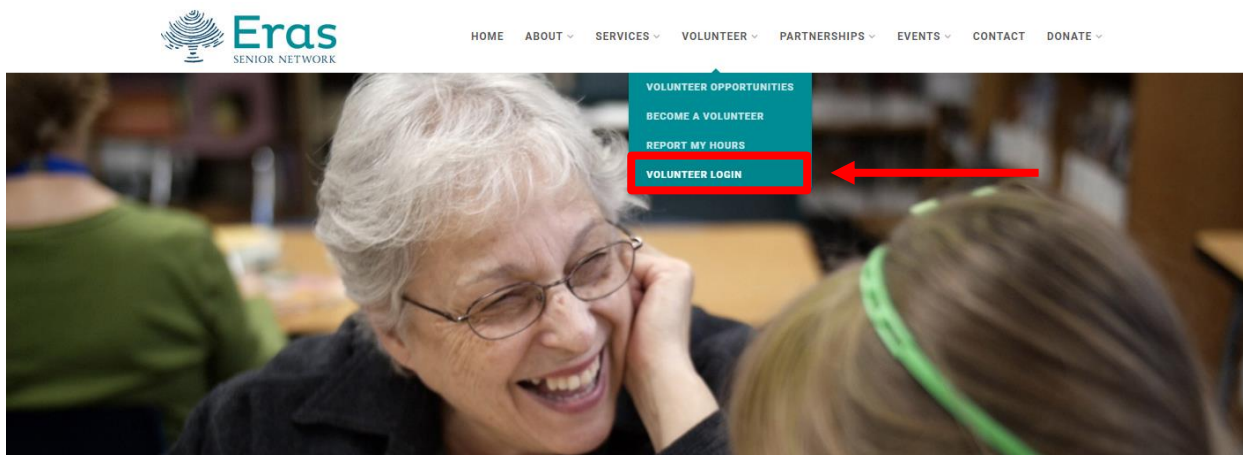
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ACCESSING THE VOLUNTEER PORTAL

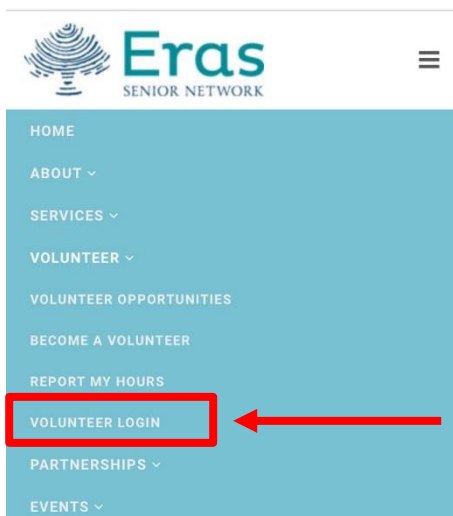
On the Computer

1. Go to the main website at www.Eras.org.
2. Hover your cursor on the “Volunteer” tab at the top of the screen, until a drop down list appears.
3. Then click on “Volunteer Login” at the bottom of the drop down list. You will be taken to a page to login and also will see these instructions. Click “Login Now”.
4. You will be redirected to a Portal Page. Click “Returning Volunteers Log in here”.



Through the Phone

1. Go to www.Eras.org.
2. Click on the three horizontal lines in the top right of the website above the scrolling banner.
3. Hover over the word “Volunteer” in the drop down menu that appears.
4. More options will appear. Click on the words “Volunteer Login”.
5. You will be taken to a page to login and also will see these instructions. Click “Login Now”. You will be redirected to a Portal Page. Click “Returning Volunteers Log in here”.



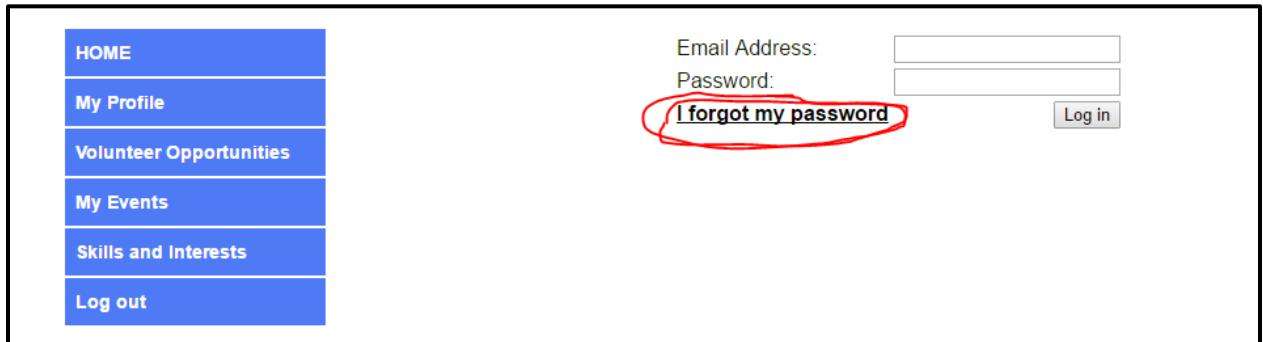
FIRST TIME LOGGING IN

If you applied online and already created a password, log in with that and skip steps 2-3.

If you've forgotten your password or need to create a password, please follow the steps below.

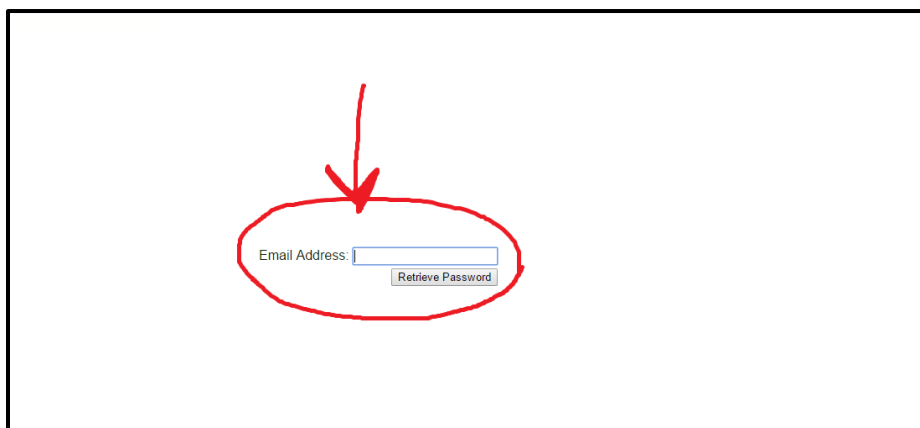
Creating or Retrieving Your Unique Password

1. Navigate to the Volunteer Portal. (See page 2 for instructions)
2. Click "I forgot my password"



3. Enter the email address you signed up with and click "Retrieve Password." Your unique password will be sent to your email address.

***NOTE:** If you have previously created a password the email sent will contain that password. If this is the first time creating a password the email sent will contain a computer generated password. The password that is sent to you is not a temporary password. This is your password to log into the portal. If you would like to change it to something more personal please continue with the steps below.



4. Enter your email address and your unique password in the respective fields.
5. Click on the “Log in” button. (Password is case sensitive).

The screenshot shows a user interface with a navigation menu on the left and login fields on the right. The navigation menu includes links for HOME, My Profile, Volunteer Opportunities, My Events, Skills and Interests, and Log out. The login section contains fields for Email Address and Password, a link for 'I forgot my password', and a 'Log in' button which is circled in red.

6. You will be taken to the Volunteer Opportunities page. To change your password, use the navigation panel on the left side of the page in blue and click “My Profile”.
7. The information you provided on your application will be listed here. Be sure to change your password in the field that says “Please choose a login password” to what you would like your new password to be.

***NOTE:** Please do not change any other information on this screen. If you see something that needs to be updated, please notify an Eras staff member.

The screenshot shows the 'My Profile' page with a navigation menu on the left and a form titled 'Please update your information here' on the right. The form contains the following fields:

- First Name: First * Required
- Middle Name: [Empty]
- Last Name: Last * Required
- Address: 210 NW Barstow St * Required
- Address 2: Ste 101
- City: Waukesha * Required
- State: WI * Required
- Zip: 53188 * Required
- Home Phone: [Empty]
- Cell Phone: [Empty]
- Work Phone: (262) 549-3348
- Email: VolunteerManager@ErasWaukesha.org * Required
- Please choose a login password: temppass * Required
- Gender: Female
- Race: Select Value
- How did you hear about us?: Agency volunteer * Required

8. Be sure to **scroll all the way down** and click on the “Save” button at the bottom of the screen.

SIGNING UP FOR RIDES

Volunteer Opportunities

1. If you would like to see current driving opportunities available to volunteer for, click on the words “Volunteer Opportunities” in the blue box on the left side of the screen.
2. The acronyms for the services requested by the client are at the top of the page. They correspond to the acronyms next to the clients’ name on the event.
 - **HC – Healthcare Transportation** (doctor, dentist, medical appointment, etc.)
 - **E – Errands** (only in Waukesha County: go to the bank, library, etc.)
 - **SW – Shopping With Client** (the client comes to the store with you)
 - **SF – Shopping For Client** (you pick up the groceries and bring them to the client)
 - **TO – Other Transportation** (Milwaukee County: bank, library, etc.)
(Waukesha County: meet with career counselor, etc.)
3. Filter your results to find a ride that fits exactly what you’re looking for (or don’t filter and view all available rides):
 - a. Choose from the “Select a Service” drop down to filter for a specific ride type.
 - b. Choose from the “Select a County” drop down to filter rides for Waukesha or Milwaukee County.
 - c. Enter zip code(s) to search for client pick-up location. To search multiple locations, enter a space between each zip code. See the next page for a listing of zip codes and their corresponding cities.
 - d. Enter a date range in the “Date from” and “Date to” fields at the top of the screen and click on the button “Search” to display a specific date range of volunteer opportunities available.
4. To select an event to volunteer for, click on the “Register/More Info” button.

Below are the acronyms to services that are listed on the events:

- HC – Healthcare Transportation
- E – Errands
- SW – Shopping With Client
- SF – Shopping For Client
- TO – Other Transportation

Search filters:

** Select a Service ** ** Select a County ** Enter Street or Zip Search

Date from: 02/12/2020 Date to: 02/12/2021 Sort: Ascending Only My Registered Events Search

March 2020

Tuesday, March 17, 2020

Connie Client, **HC**
 Tuesday, March 17, 2020 - 11:00 AM - 12:00 PM
 Oak Creek 53154 to Drexel Town Square Health Center 7901 S 6th street Oak Creek

Register / More Info
1 Available

Milwaukee County Zip Codes			
Area 1 – Northwest	Area 2 - Northeast	Area 3 - Southwest	Area 4 - Southeast
53216 – Milwaukee	53217 – Bayside Fox Point	53132 – Franklin	53207 – Bayview
53218 – Milwaukee	53209 – Brown Deer	53129 – Greendale	53110 – Cudahy
53224 – Milwaukee	53223 – Brown Deer	53219 – Greenfield West Allis	53201 – Milwaukee
53210 – Wauwatosa	53212 – Glendale	53220 – Greenfield	53204 – Milwaukee
53213 – Wauwatosa	53202 – Milwaukee	53221 – Greenfield	53233 – Milwaukee
53222 – Wauwatosa	53203 – Milwaukee	53228 – Greenfield New Berlin	53237 – Milwaukee
53225 – Wauwatosa	53205 – Milwaukee	53234 – Greenfield West Allis	53154 – Oak Creek
53226 – Wauwatosa	53206 – Milwaukee	53130 – Hales Corners	53172 – South Milwaukee
	53208 – Milwaukee	53227 – New Berlin West Allis	53235 – St. Francis
	53211 – Whitefish Bay Shorewood	53214 – West Allis	
		53215 – West Milwaukee	

Waukesha County Zip Codes			
Area 1 – Northwest	Area 2 - Northeast	Area 3 - Southwest	Area 4 – Southeast
53018 – Delafield	53005 – Brookfield	53118 – Dousman	53103 – Big Bend
53029 – Hartland	53045 – Brookfield	53119 – Eagle	53150 – Muskego
53058 – Nashotah	53007 – Butler	53149 – Mukwonago	53146 – New Berlin
53066 – Oconomowoc	53122 – Elm Grove	53153 – North Prairie	53151 – New Berlin
53069 – Okauchee Lake	53046 – Lannon	53183 – Wales	
53072 – Pewaukee	53051 – Menomonee Falls	53189 – Waukesha	
53188 – Waukesha	53072 – Pewaukee		
	53089 – Sussex		
	53186 – Waukesha		

- After clicking “Register/More Info” button, this screen will appear with details of the client’s address and destination. Click on “Register” again to be registered for the event. After registering you will receive a confirmation email from NewOrg. **If you do not receive an email within one day, please contact us.**

The screenshot shows a web interface for event registration. At the top, there are navigation tabs: "Instructions", "1. Select Event", and "2. Log in or Register". The "2. Log in or Register" tab is active. Below the tabs, there is a text box with instructions: "Click on the Register button to sign up for this event. You can return to this page to cancel your registration. If you have any difficulties, please contact us at volunteermanager@eraswaukesha.org". To the right, it says "Logged in as: Log Out" and "Rebecca Schwarz" with a "Back to Calendar" button. The event details are: "Connie Client: HC", "Tuesday, March 17, 2020", "11:00 AM - 12:00 PM", "1234 Main Street, Waukesha, WI 53188", and "Oak Creek 53154 to Drexel Town Square Health Center 7901 S 6th street Oak Creek". There are social media icons for email, LinkedIn, Twitter, and Facebook. A "View map" button is present. A red arrow points to a "Register" button, which is circled in red. Below the event details, there is an "Availability" section with a table:

Group Name	# Available
General Public	1

- After clicking “Register” button, you will see the words “You are now registered for this event”. If you need to, you can click on the “Cancel Registration” button to cancel the ride. Please also contact us by phone if you need to cancel a ride. Click on the “Back to Calendar” button to exit out of the screen.

The screenshot shows the same web interface as the previous one, but after registration. The "Instructions" box now says: "You are already registered for this event. Follow the instructions below to Review or Cancel your reservation. If you have any difficulties, please contact us at volunteermanager@eraswaukesha.org". The "Back to Calendar" button is circled in red. A blue banner with the text "You are now registered for this event" is displayed. Below the banner, the "Cancel Registration" button is circled in red. The "Availability" table now shows 0 available spots:

Group Name	# Available
General Public	0

My Events

- Once you have registered for an event, you are able to view the details (such as the client address, phone number, and destination) by clicking on the words “[My Events](#)” in the blue box at the left.
 - You can filter the registered events you see by using the date range filter at the top of the screen. Enter in a “Start” date and “End” date then click “[Go](#)” to see specific registered events.

HOME			
My Profile			
Volunteer Opportunities			
My Events			
Skills and Interests			
Log out			

Filter Dates: Start: <input type="text" value="01/12/2020"/> (mm/dd/yyyy) End: <input type="text" value="03/27/2020"/> (mm/dd/yyyy) <input type="button" value="Go"/>			
Details	Description	Client/Station	Destination
Service-Healthcare Transportation County: Milwaukee Date: <input type="text" value="03/17/2020"/> (mm/dd/yyyy) Start: 11:00 AM - 12:00 PM Approx. Time: <input type="text" value="0"/> (Minutes) Miles: <input type="text"/> Status: <input type="text" value="Scheduled"/>	Oak Creek 53154 to Drexel Town Square Health Center 7901 S 6th street Oak Creek, WI	Connie Client 1234 Main Street #A Waukesha, WI 53188 H: (262) 555-1234	Froedtert - Drexel Town Square Health Center 7901 S. 6th St. Oak Creek 53154 Map & Directions
Client Notes: Walker with wheels and seat Adding test material			
<input type="button" value="Update"/>			

- The “Details” column will display the Event Type, Date, Time of the Event, Scheduled Amount of Time (in minutes) to complete the event, Miles driven (**note this is not for mileage reimbursement**), and Status of the Event.
- The “Description” column will include notes about the volunteer assignment when applicable. (For example: “Needs to make two stops”, etc.)
- The “Client/Station” column will include the Name, Address, and Phone Number of the person who requested the ride. ***Please call the client 24 hours before their ride to confirm you are picking them up.**
- The “Destination” column will include the destination a volunteer will take the client to and a “[Map & Directions](#)” link.
- The “Client Notes” at the bottom of the event will have details about the client the driver should know. (For example: “Has a seated walker”, etc.)
- Please remember to record your hours after you have completed the event.** (See “Recording Hours” on page 9 of this booklet for further instructions.)

RECORDING HOURS

- Please report your hours *only after* you have actually completed the requested service.
- There are two different ways to report your hours:

Online Form

1. Go to the main website at www.Eras.org.
2. Hover your cursor on the “Volunteer” tab at the top of the screen, until a drop down list appears.
3. Then click on “Report My Hours” towards the bottom of the drop down list. You will be taken to a fillable form where you can record your hours.
4. Enter your name, email, phone number, which county you volunteer in, and then there is space for you to list each ride or event you volunteered for (date of service, name of client, service provided, address of where you went, total hours).

Volunteer Name *				
<input type="text"/>				
Email Address *				
<input type="text"/>				
Phone Number * (Format: 555-555-5555)				
<input type="text"/>				
Where do you volunteer? *				
<input type="text" value="..."/>				
Date of volunteer service MM/DD/YYYY	Agency or client served	Service provided	Address of where you drove client	Total hours
<input type="text" value="Date of service"/>	<input type="text" value="Agency/client served"/>	<input type="text" value="Service provided"/>	<input type="text" value="Address of destination"/>	<input type="text" value="Total h:"/>
<input type="text" value="Date of service"/>	<input type="text" value="Agency/client served"/>	<input type="text" value="Service provided"/>	<input type="text" value="Address of destination"/>	<input type="text" value="Total h:"/>
<input type="text" value="Date of service"/>	<input type="text" value="Agency/client served"/>	<input type="text" value="Service provided"/>	<input type="text" value="Address of destination"/>	<input type="text" value="Total h:"/>
Additional Comments:				
<input type="text"/>				
<input type="button" value="SEND"/>				

On The Portal

1. Go back to the “My Events” section in the blue box on the left side of the screen.

HOME	<p>Filter Dates: Start: <input type="text" value="01/12/2020"/> (mm/dd/yyyy) End: <input type="text" value="03/27/2020"/> (mm/dd/yyyy) <input type="button" value="Go"/></p> <table border="1"> <thead> <tr> <th style="background-color: #4a86e8; color: white;">Details</th> <th style="background-color: #4a86e8; color: white;">Description</th> <th style="background-color: #4a86e8; color: white;">Client/Station</th> <th style="background-color: #4a86e8; color: white;">Destination</th> </tr> </thead> <tbody> <tr> <td>Service-Healthcare Transportation County: Milwaukee Date: <input type="text" value="03/17/2020"/> (mm/dd/yyyy) Start: 11:00 AM - 12:00 PM Approx. Time: <input type="text" value="0"/> (Minutes) Miles: <input type="text"/> Status: <input type="text" value="Scheduled"/></td> <td>Oak Creek 53154 to Drexel Town Square Health Center 7901 S 6th street Oak Creek</td> <td>Connie Client 1234 Main Street #A Waukesha, WI 53188 H: (262) 555-1234</td> <td>Froedtert - Drexel Town Square Health Center 7901 S. 6th St. Oak Creek 53154 Map & Directions</td> </tr> <tr> <td colspan="4">Client Notes: Walker with wheels and seat Adding test material</td> </tr> <tr> <td colspan="4" style="text-align: center;"><input type="button" value="Update"/></td> </tr> </tbody> </table>	Details	Description	Client/Station	Destination	Service-Healthcare Transportation County: Milwaukee Date: <input type="text" value="03/17/2020"/> (mm/dd/yyyy) Start: 11:00 AM - 12:00 PM Approx. Time: <input type="text" value="0"/> (Minutes) Miles: <input type="text"/> Status: <input type="text" value="Scheduled"/>	Oak Creek 53154 to Drexel Town Square Health Center 7901 S 6th street Oak Creek	Connie Client 1234 Main Street #A Waukesha, WI 53188 H: (262) 555-1234	Froedtert - Drexel Town Square Health Center 7901 S. 6th St. Oak Creek 53154 Map & Directions	Client Notes: Walker with wheels and seat Adding test material				<input type="button" value="Update"/>			
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<input type="button" value="Update"/>																	
My Profile																	
Volunteer Opportunities																	
My Events																	
Skills and Interests																	
Log out																	

2. Locate the ride that you would like to report hours for.
3. Enter the **actual amount of time** you volunteered in the field labeled “Time”. Please note that time is in **minutes**, and enter in quarter hour increments (15 minute intervals).
4. Change the status of the event to “Complete”
5. Click on the “Update” button to save any changes you made. (You may have to scroll down to the bottom of the page to find the button)

HOME	<p>Filter Dates: Start: <input type="text" value="01/12/2020"/> (mm/dd/yyyy) End: <input type="text" value="03/27/2020"/> (mm/dd/yyyy) <input type="button" value="Go"/></p> <table border="1"> <thead> <tr> <th style="background-color: #4a86e8; color: white;">Details</th> <th style="background-color: #4a86e8; color: white;">Description</th> <th style="background-color: #4a86e8; color: white;">Client/Station</th> <th style="background-color: #4a86e8; color: white;">Destination</th> </tr> </thead> <tbody> <tr> <td>Service-Healthcare Transportation County: Milwaukee Date: <input type="text" value="03/17/2020"/> (mm/dd/yyyy) Start: 11:00 AM - 12:00 PM Approx Time: <input type="text" value="0"/> (Minutes) Miles: <input type="text"/> Status: <input type="text" value="Scheduled"/></td> <td>Oak Creek 53154 to Drexel Town Square Health Center 7901 S 6th street Oak Creek</td> <td>Connie Client 1234 Main Street #A Waukesha, WI 53188 H: (262) 555-1234</td> <td>Froedtert - Drexel Town Square Health Center 7901 S. 6th St. Oak Creek 53154 Map & Directions</td> </tr> <tr> <td colspan="4">Client Notes: Walker with wheels and seat Adding test material</td> </tr> <tr> <td colspan="4" style="text-align: center;"><input type="button" value="Update"/></td> </tr> </tbody> </table>	Details	Description	Client/Station	Destination	Service-Healthcare Transportation County: Milwaukee Date: <input type="text" value="03/17/2020"/> (mm/dd/yyyy) Start: 11:00 AM - 12:00 PM Approx Time: <input type="text" value="0"/> (Minutes) Miles: <input type="text"/> Status: <input type="text" value="Scheduled"/>	Oak Creek 53154 to Drexel Town Square Health Center 7901 S 6th street Oak Creek	Connie Client 1234 Main Street #A Waukesha, WI 53188 H: (262) 555-1234	Froedtert - Drexel Town Square Health Center 7901 S. 6th St. Oak Creek 53154 Map & Directions	Client Notes: Walker with wheels and seat Adding test material				<input type="button" value="Update"/>			
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Skills and Interests																	
Log out																	

ADDITIONAL PORTAL FEATURES

Once you are logged into the portal you will see a few additional tabs in the blue box on the left. We wanted to let you know that these sections are here but please do not edit any of the information. This gets automatically updated in our database and changes made by volunteers could result in issues. If you see something that needs to be updated please contact us.

My Profile

- This information is a copy of your volunteer application. It provides us with your contact information, references, availability, and more.
- **Please do not change any information on this screen. If you see something that needs to be updated, please notify an Eras staff member.**

First Name	<input type="text"/> * Required
Last Name	<input type="text"/> * Required
Email	<input type="text"/> * Required
Please choose a login password	<input type="text"/> * Required
Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/>
Home Phone	<input type="text"/>
Cell Phone	<input type="text"/>
Gender	Select Value ▼
Birthday	<input type="text"/> 