

Quick Reference Guide for Blood Drive Coordinators

QUICK REFERENCE GUIDE: NEW COORDINATOR and DONOR SCHEDULING SITES

Thank you for saving lives with Vitalant! It is our top priority to make your blood drive and the donation experience for donors the best possible. In doing so, we will transition to a new online appointment scheduling site for donors and blood drive coordinators on May 16, 2023. We hope this guide will help answer any questions you or donors may have about this transition. If you need additional help, please reach out to your Vitalant representative.

KEY TAKEAWAYS

- **As part of this transition, blood drive coordinators (and donors who want an online account) must create one on the new site.**
 - For security purposes, usernames and passwords from our old platforms will not transfer automatically to the new platform.

- **Beginning May 16, 2023, the following blood drive coordinators will receive a Vitalant email invitation from givingblood@vitalant.org to create and activate their new Coordinator Portal account:**
 - Have a blood drive scheduled (and in confirmed status) for May 16, 2023 and later.
 - Note: If you host more than one drive per year, you will only get one email invitation to create an account.
 - Have hosted a blood drive in the past two years.
 - *If you don't receive an email from Vitalant, please work with your IT team to ensure emails from getinvolved@vitalant.org and givingblood@vitalant.org are not blocked by any security and firewall settings.*
 - *If you fit the criteria above and do not receive your email by May 22, please reach out to your Vitalant representative. If you don't fit the criteria above, you will receive an email to create your Coordinator Portal account once you schedule and confirm a future blood drive.*

- **On/after May 16, please share the account creation information in this document with your donors to assist them with setting up their new online accounts (a one-time set up). See p. 2.**

- **On/after May 16, please bookmark the new sites on your internet browser:**
 - The **Coordinator Portal** can be accessed at coordinators.vitalant.org, replacing the previous AccountView blood drive site.
 - The **Donor Portal** can be accessed at donors.vitalant.org, replacing the previous DonorView account site.

ADDITIONAL INFORMATION

Coordinator Account Creation

Note: On/after May 16, blood drive coordinators will be 'invited' (via email) to create their Coordinator Portal account. There is no way to create an account otherwise (there is no 'create account' link on the Coordinator Portal like Vitalant has for donors on the Donor Portal).

Creating a new account on our new Coordinator Portal is easy! Please follow these simple steps to complete the account activation and set up:

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1. To get you started, Vitalant will send you an email from givingblood@vitalant.org with an activation link and instructions for setting up your Coordinator Portal account.
 - a. If you haven't yet shared your email address with us, please do so now. Your email address will be your username. It cannot be used by another Vitalant blood drive coordinator for their account.
 - b. The activation link is valid for 30 days.
2. In this email, we will provide you with a temporary password that you'll use to log in to your account.
3. You will be prompted to change it to a permanent password. **Passwords must be at least 8 characters in length and include upper and lowercase letters, and at least one number and special character. Passwords are case sensitive.**

Donor Account Creation

All donors who want to use the new site must create a new account on or after May 16, 2023, but not prior to this date because they won't be able to view certain things like already-scheduled future appointments or recognition points earned.

- **Each donor must have a unique email address in their donor record (one that is not shared with another Vitalant donor).** If donors are unsure which email address is in their donor record or have not yet provided it to Vitalant, please ask them to let one of our staff know or contact us at 877-258-4825 or dpsupport@vitalant.org.
 - All donors with an email address in their donor record will receive an email from **getinvolved@vitalant.org** on or after May 16 with instructions to create a new account.
 - Once a donor begins the account creation process, they'll receive a second email from **givingblood@vitalant.org** which includes a link they must click to activate their account and set up their password.
 - Donors are encouraged to add **getinvolved@vitalant.org** and **givingblood@vitalant.org** to their email "safe senders" list to ensure they receive this and other emails from Vitalant. If they don't receive the email(s), they should check their junk or spam email folder.
 - Emails sent to AOL, Hotmail and Yahoo accounts could be delayed for several hours (up to 24) before donors get them delivered to their inbox.
- All donors who create their online donor account at donors.vitalant.org, May 16 – June 9, 2023, are automatically entered in a giveaway to win 1 of 5 - \$500 Amazon.com Gift Cards. *Note: More details about this special promotion will be shared in the future.*
- **If donors don't receive an email invitation to create their account, they may visit Vitalant.org/instructions for more information.**

Donor Scheduling and Blood Drive Code

The scheduling section of the Donor Portal and the donor account will have a whole new look and improved functionality.

- Donors can find a convenient donation site using current location (location services must be enabled on the user's device).
- Donors can easily schedule an appointment by location and donation type.
- Donors will notice a difference in wording when looking up a blood drive by code. Previously, it was called "group code"; however, in the new Donor Portal it is called "blood drive code."

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Donor Recognition Program

Beginning May 16, donors may redeem their points for thank-you gifts in a new online donor store. A new donor account must be created on the new Donor Portal to access this donor store.

- If a donor is currently opted in to the Donor Recognition Program AND has come to donate within the past 15 months (since Feb. 14, 2022), their active points will transfer to their new donor account and their opt-in status will remain the same.
 - To keep points active and transferrable, donors who haven't donated since Feb. 14, 2022 need to come donate on or before May 10, 2023.
- Donors who have not come to donate since Feb. 14, 2022 at the time of this transition in May, including new donors, must first create a donor account on the new Donor Portal and opt in to the program to earn points for future donations.
- Points do not expire if a donor gives a successful donation at least once every 15 months.

Online Health History Questionnaire

As part of the transition to a new donor platform, DonorPass will be replaced with the Fast Track Health History to save time at the donation visit. See *Donor FAQs*, p. 5.

- The look and feel of the online questionnaire will be new, but Vitalant donors will continue to enjoy the features currently available.
 - [Fast Track Health History Guide for Donors](#)
 - [Fast Track Health History "How To" Video](#)

ADDITIONAL RESOURCES FOR DONORS AND COORDINATORS

Resources for donors:

[How to Create a New Account and Log In](#)

- [How to Create a New Account VIDEO](#)

[How to Schedule/Manage Appointments](#)

[How to Access/Complete Fast Track Health History](#)

- [How to Complete Your Fast Track Health History VIDEO](#)

[How to View Wellness Info, Adjust Profile Info and View/Order Donor ID Card](#)

Resources for blood drive coordinators:

[Coordinator Portal Online Guide](#)

[How to Schedule a Donor Appointment](#)

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FREQUENTLY ASKED QUESTIONS from BLOOD DRIVE COORDINATORS

Q: Will I be able to view historical blood drive results in the new Coordinator Portal?

A: There will be two years' worth of blood drive history in the new Coordinator Portal.

Q: Will I see the names and contact information of donors who participated in previous blood drives?

A: Yes. You will have access to a list of donors who have donated in the past four years with your blood drive.

Q: Can coordinators run a report of all donors and their contact information or can they only see contact information one at a time?

A: Coordinators can pull a list of donors and export it as an Excel spreadsheet. It will include all of the donors' contact information.

Q: Is the Coordinator Portal's "Blood Drive code" the same as "Group code"?

A: Yes. In the Coordinator Portal, the group code for your blood drive is now called "Blood Drive Code". Donors will use the Blood Drive Code in the Donor Portal to search for your blood drive schedule.

Q: Will emails that coordinators send via the Coordinator Portal get sent to deferred donors?

A: If a coordinator sends an email to a specific donor, and that donor has an active deferral, the email will not be sent, and the coordinator will get an error message. Individual (and group) email attempts to eligible donors will successfully distribute.

Q: If I was a new coordinator taking over a longtime drive from a "retiring coordinator," will I have access to all of the donors for my drive to continue the recruitment process for them?

A: Yes.

Q: As new blood drives are scheduled in the future, will coordinators then receive an invitation to set up an account?

A: Yes. When a future blood drive gets confirmed, it will trigger the "Create Account" email to the coordinator within 24 hours.

FREQUENTLY ASKED QUESTIONS from DONORS

Q: Do I have to set up a donor account to give blood?

A: No. You can donate without setting up an account; however, you will not be able to create any appointments yourself, access your donation and health history, and enjoy the other numerous benefits of having a donor account.

Q: I have not created a new account yet. May I still schedule an appointment on the new Donor Portal?

A: You can search for an appointment without logging in first but will be required to either log in or create a new account in order to confirm the appointment. If you create a new account, the appointment will be created and saved immediately, even if you don't fully activate your account. **Vitalant strongly encourages you to complete the account activation process when you schedule your appointment so that you can view your wellness and appointment information moving forward.** Watch for an email from givingblood@vitalant.org with a link you'll need to click to create and activate your new account. Once you click the link, you'll be prompted to create/confirm a password.

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Q: I never received an activation email. What can I do?

A: There is a possibility that this email got blocked. Please check any spam filters or folders and add **givingblood@vitalant.org** to your email client's "safe sender" list. Then, simply go to donors.vitalant.org, click "Log In" and then click the link "Forgot password or need to activate your account?" and enter your email address to receive another account activation email.

Q: Will I still have my donor ID number and is my donor ID card still good?

A: Your donor ID number changed with this transition. You can access your new donor ID number via your new Donor Portal account and share it via your cell phone for Vitalant staff to scan at check-in. You may also download the Vitalant donor mobile app via Google Play or the App Store to view your donor ID, however, you must first create a new online donor account at donors.vitalant.org. Also, you may present your old donor ID for staff to look up your information. *Note: some donors will receive replacement donor ID cards in the mail. If they don't, they may request a new donor ID card from Vitalant staff or via their Donor Portal account.*

Q: I cannot access Fast Track from within my donor account. The button is gray.

A: You can access the Fast Track Health History questionnaire from within your donor account if you have an appointment scheduled and it is the same day as your appointment. The questionnaire must be completed the same day you donate and cannot be completed even a day or several days in advance.

If you are planning to donate that day without an appointment, please click the "Fast Track Health History" link from the [donor site's home page](#) to get started. This is a different way of accessing the health history questionnaire when you do not have a donor account set up and/or do not have an appointment scheduled.

Q: I do not have an appointment but plan to donate today. Can I still complete the Fast Track questionnaire?

A: Yes! Simply click the 'Fast Track Health History' link on our [Donor Portal](#) (no need to log in to your account) and complete the questionnaire.