



VITA App

**Site Coordinators Reference**



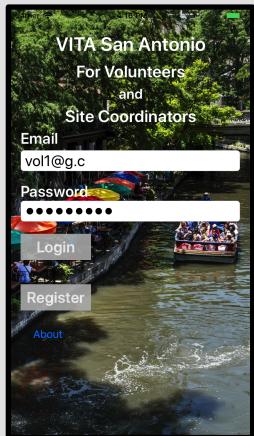
# Why an App?

- **Improve client experience**
  - Reduced wait times
  - Provide feedback
- **Improve volunteer experience**
  - Go where they are most needed
  - Provide suggestions
- **How:**
  - **Focus volunteers on sites that need and can use help**
  - Client: Visibility to sites and support options (MFT, Express, etc.)



# VITA App and Website

## Volunteers & Site Coordinators



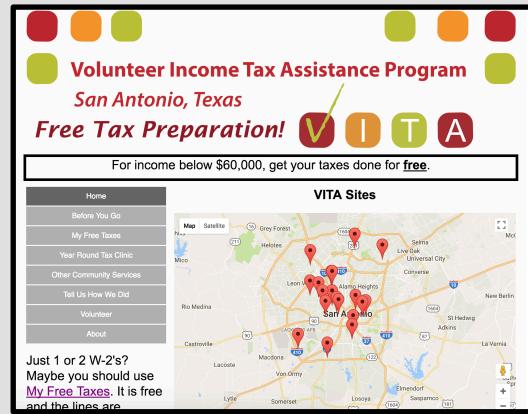
iOS Devices



Android Devices

## VITA Clients

(English and Spanish)



Browser and mobile devices



(Spanish and English)

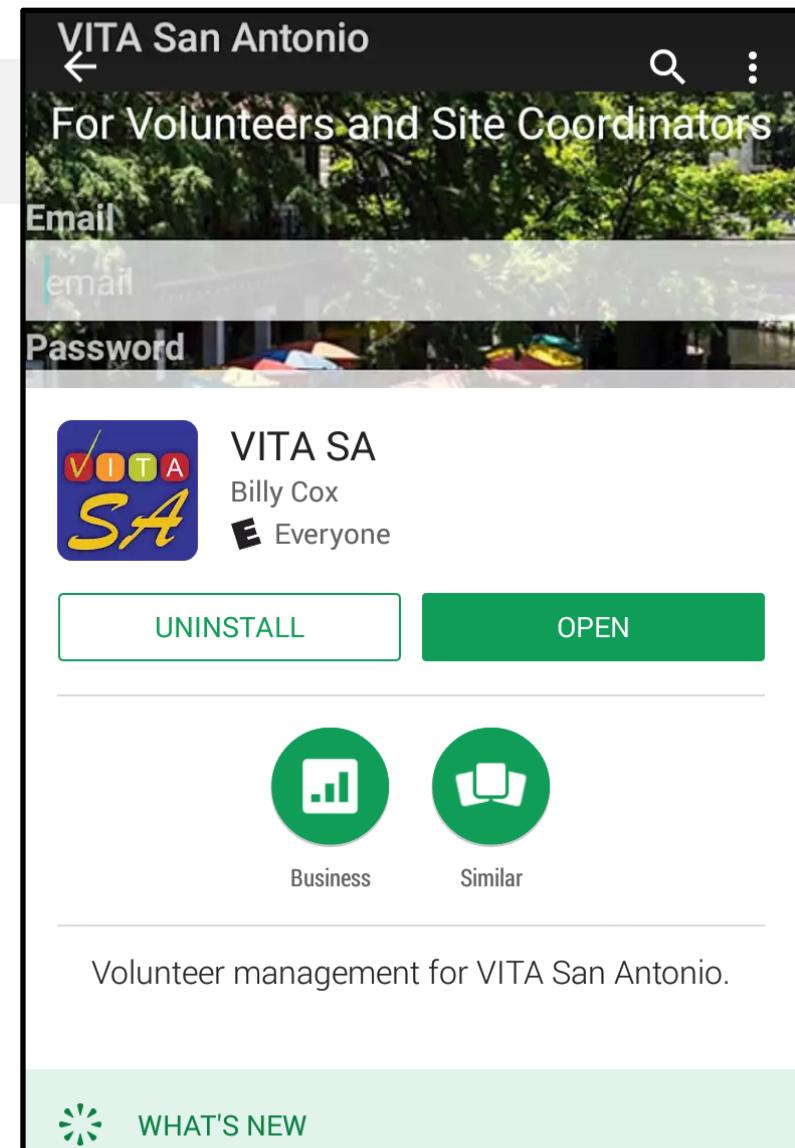
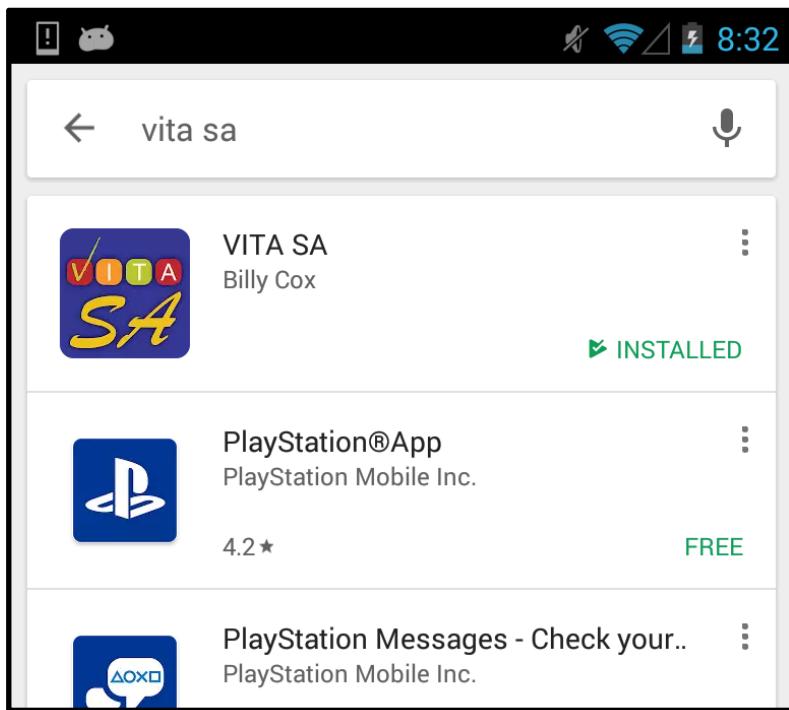
# vitasa.org - Clients

Try it out: [vitasa.org](http://vitasa.org)

- Map of sites and guidance on what to bring
- Info on VITA
- List of VITA sites, address, and services
- My Free Taxes: map and instructions
- Year Around Tax Clinic: locations and services
- Community services: list and services
- Client feedback
- Contact Us: Alejandra and Sheila
- Volunteers: why and how to volunteer

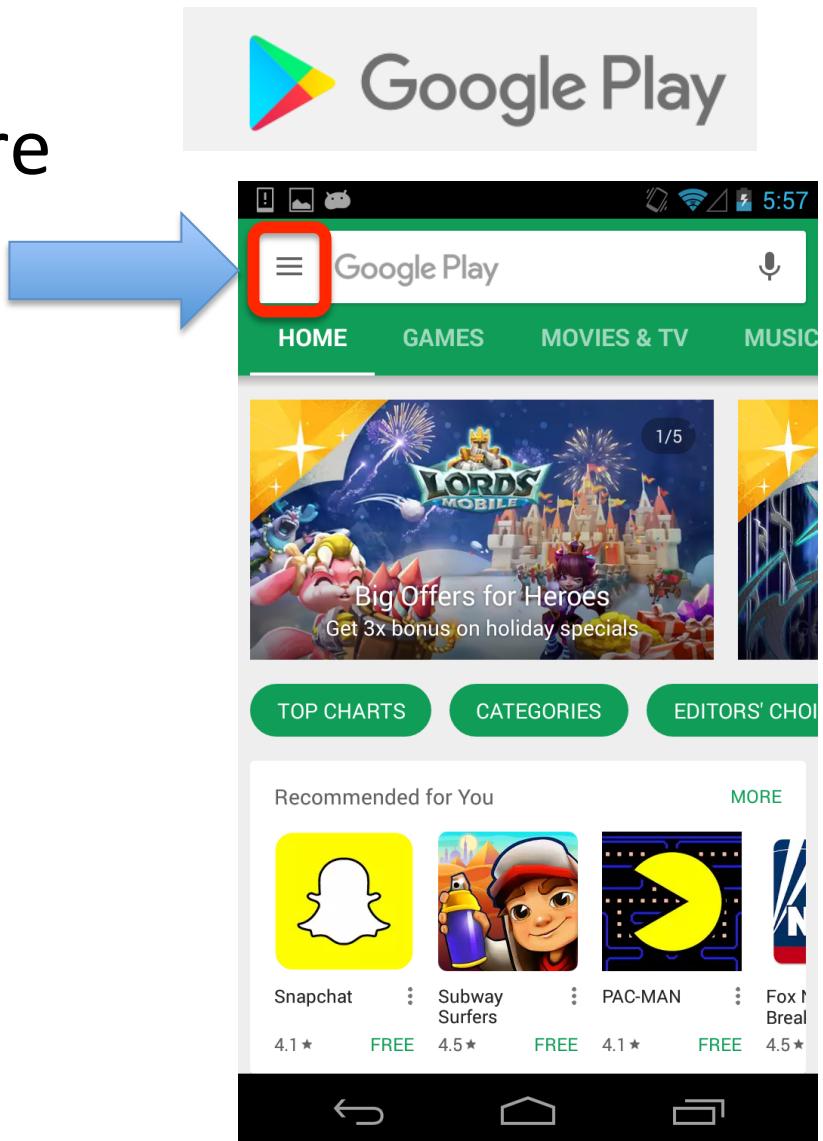
# Installation - Google

- Open Google Play Store
- Search for “vita sa”
- Select VITA SA
- Then “Install”



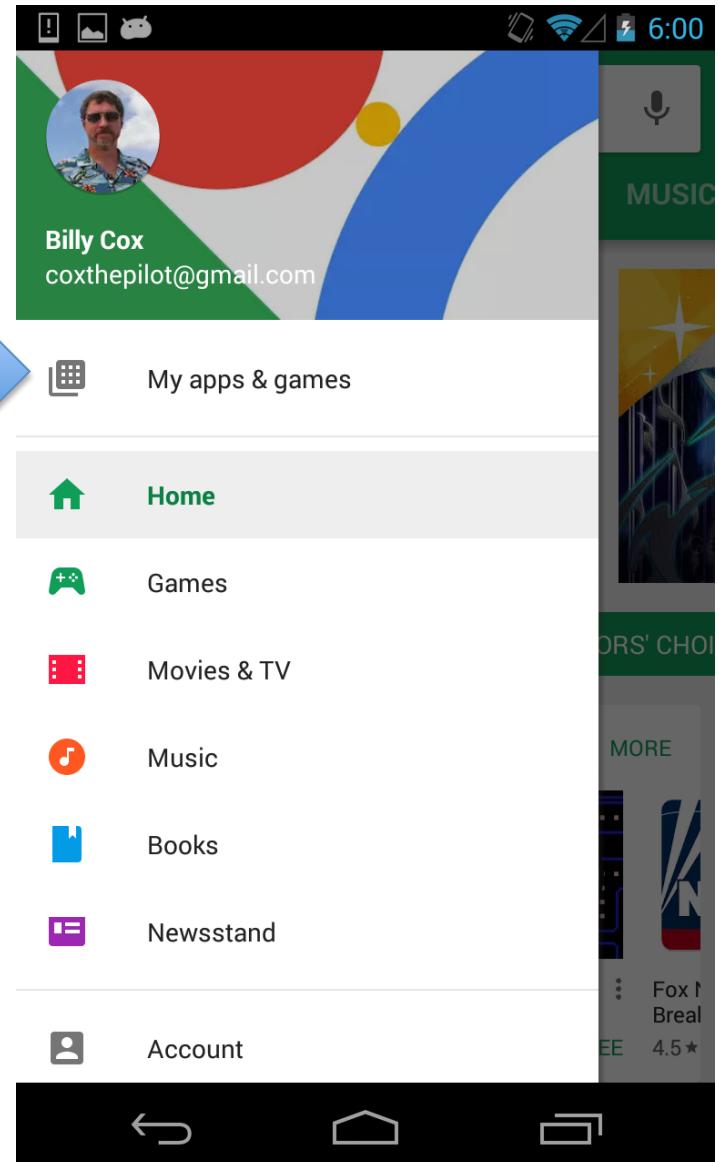
# Update - Google

- Open Google Play Store
- Open Settings



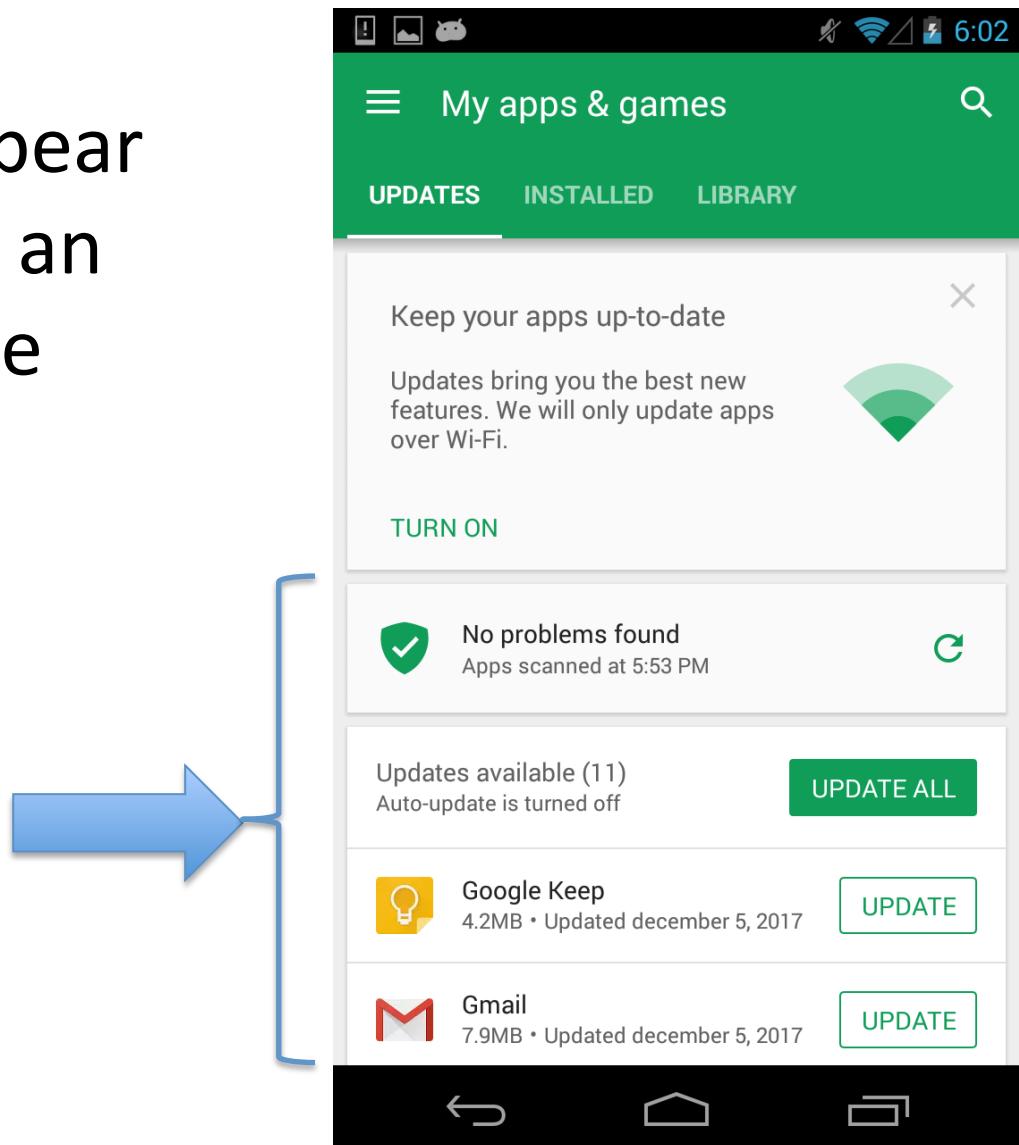
# Update - Google

- In Google Play -> Settings
- Select My apps and games



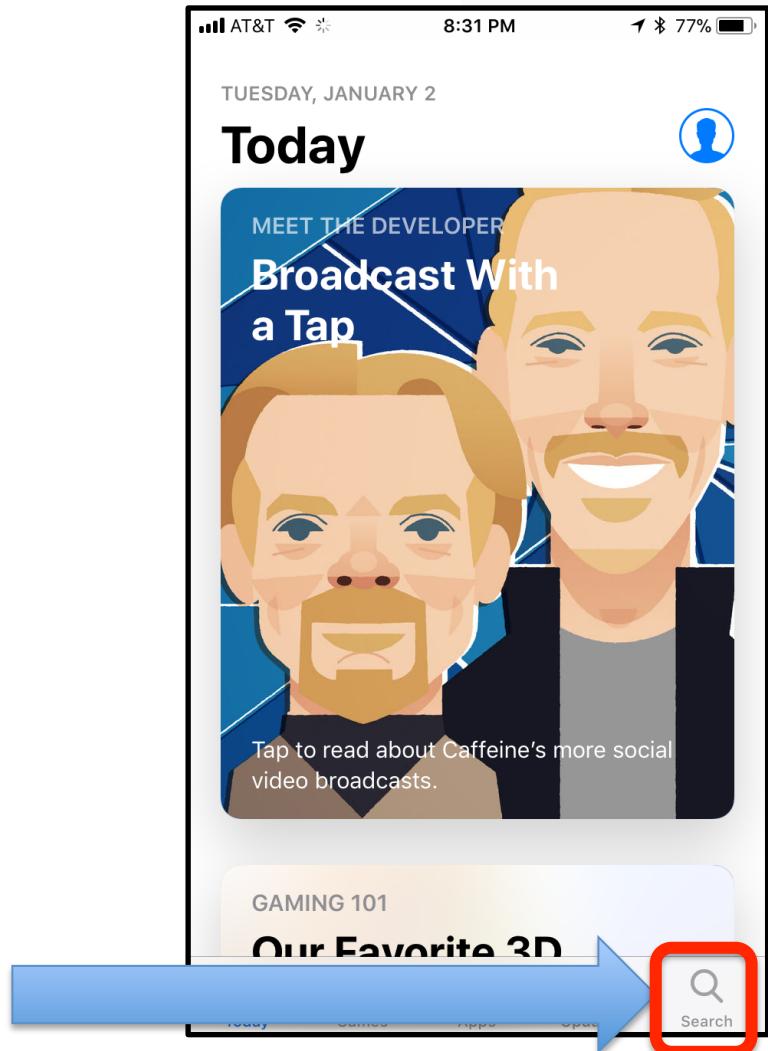
# Update - Google

- VITA SA app will appear in this list if there is an update waiting to be installed



# Installation - Apple

- Open Apple App Store
- Open Search



# Installation - Apple



- Search for “vita sa”
- “VITA Volunteer Management”
- Touch “Get” (it’s free)

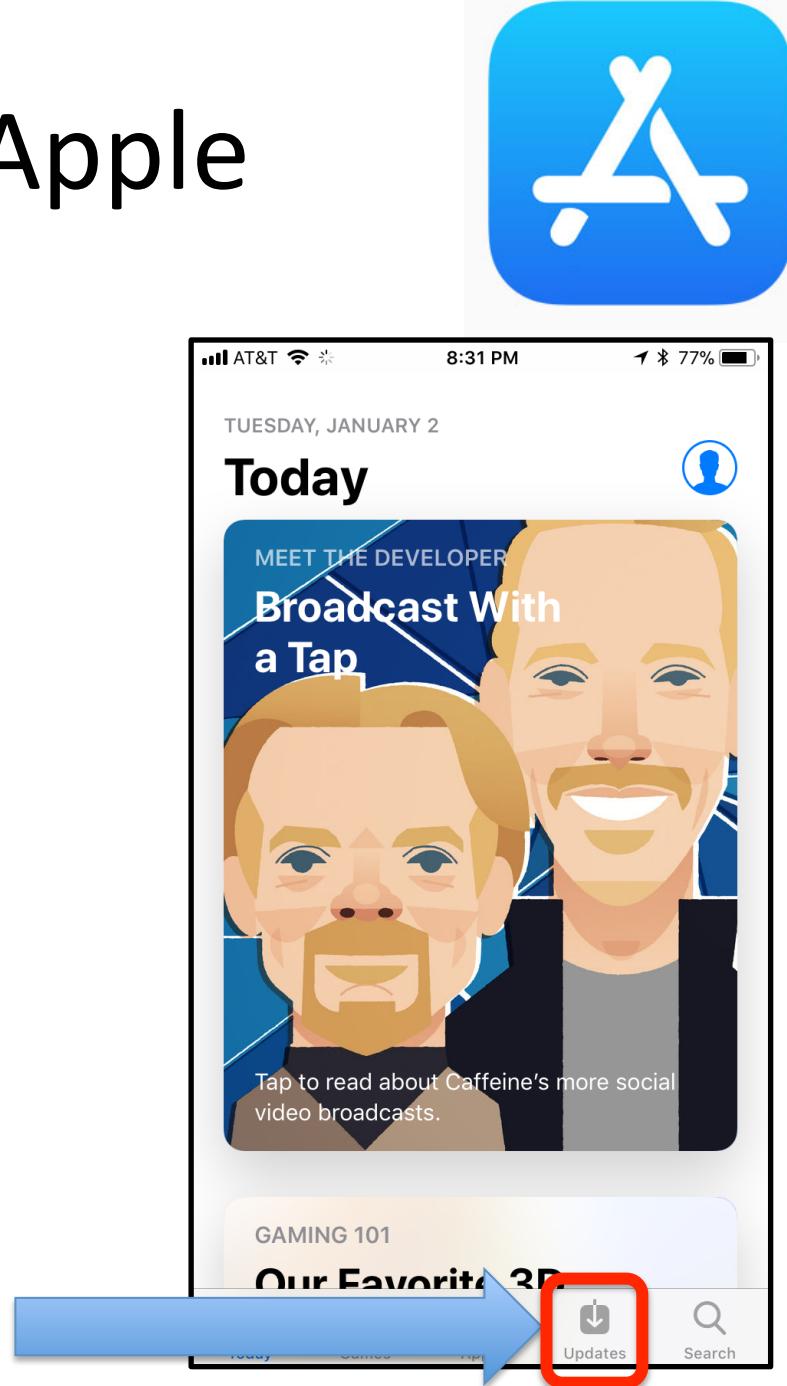
The screenshot shows the Apple App Store interface. At the top, there is a search bar with the text "vita sa". Below the search bar, there is a listing for the app "VITA SA" with the subtitle "VITA Volunteer Management". To the right of the app's name is a blue "OPEN" button. The main content area displays three cards. The first card shows the login screen for "VITA San Antonio For Volunteers and Site Coordinators", prompting for an email (volt@g.c) and password, with "Login" and "Register" buttons. The second card is titled "Select Site Date: Jan 16, 2018" and lists various sites with staffing needs: Ed Cody Library, Thousand Oaks Library, Community Center, Ella Austin Community Center, St. Philips College, Bel Air Hollow Library, Quail Ridge Community Center, The Neighborhood Place, YWCA Of San Antonio, Presa Community Center, and Palo Alto College. It includes a "Show Sites on Map" button. The third card is titled "Select Date Jan-2018" and shows a calendar for January 2018 with specific dates highlighted in orange. A legend at the bottom right defines the colors: orange for "Staffing needed", green for "Fully staffed", grey for "All sites closed", and white for "You are signed up".

Playmania - Revista de Playstation 100%...  
Entertainment  
GET  
In-App Purchases

Today Games Apps Updates Search

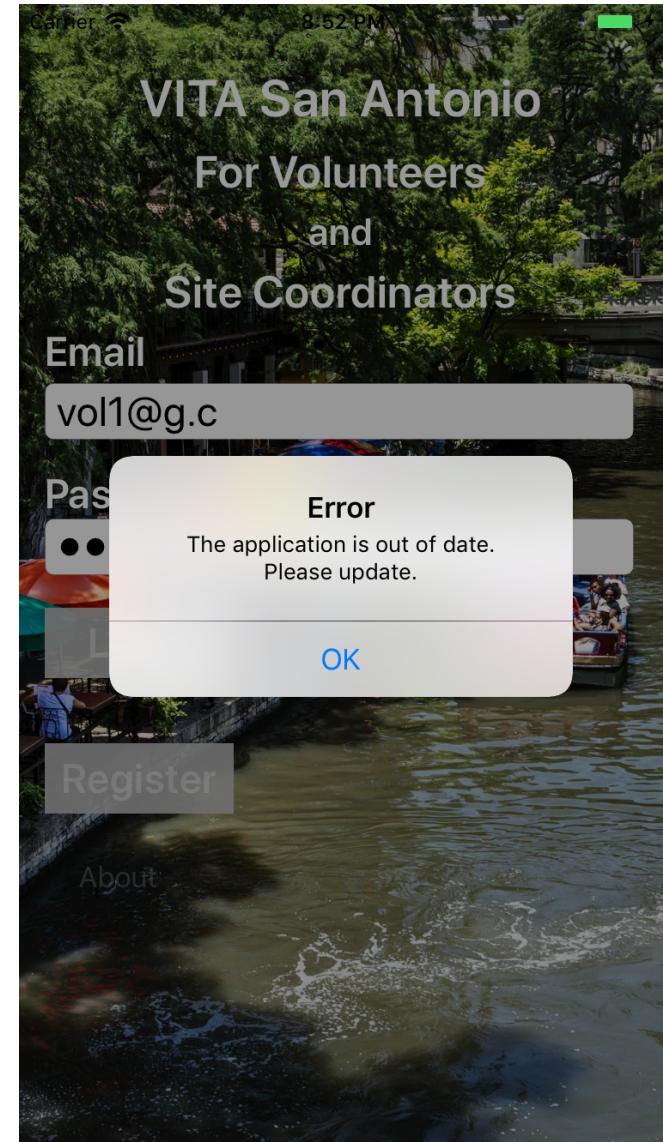
# Update- Apple

- Open App Store
- Touch Updates
- VITA SA will appear if an update is available



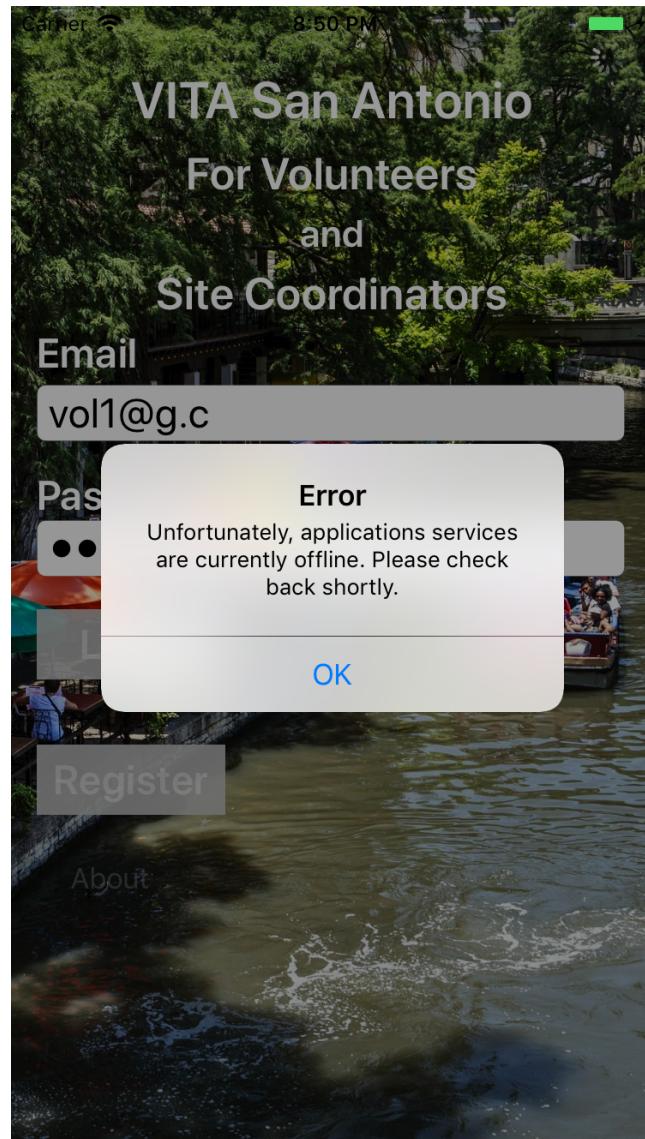
# Need for App Update

- You will need to update your app to proceed if you see: “The application is out of date. Please update.”



# App is temporarily offline

- If the app is down for maintenance, you will see this message.
- Check back in a few minutes



[< Back](#)

## New Volunteer Registration

Name: Email: 

8+ characters, 1+ alpha, 1+ numeric.

Password: Verify pw: Phone: 

Level of Certification:

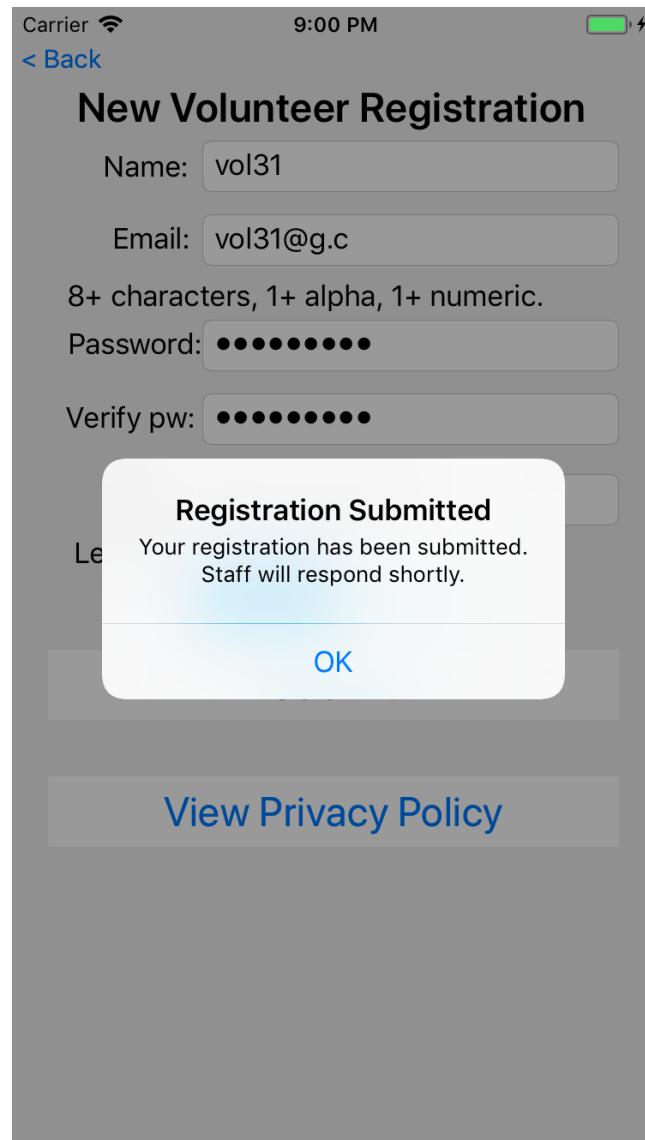
Basic AdvancedSubmit

# Register

- All Volunteers and Site Coordinators must register
- Register
  - Enter name, email, password, phone, and certification
  - Make sure you enter the exact same password twice
  - Press Submit

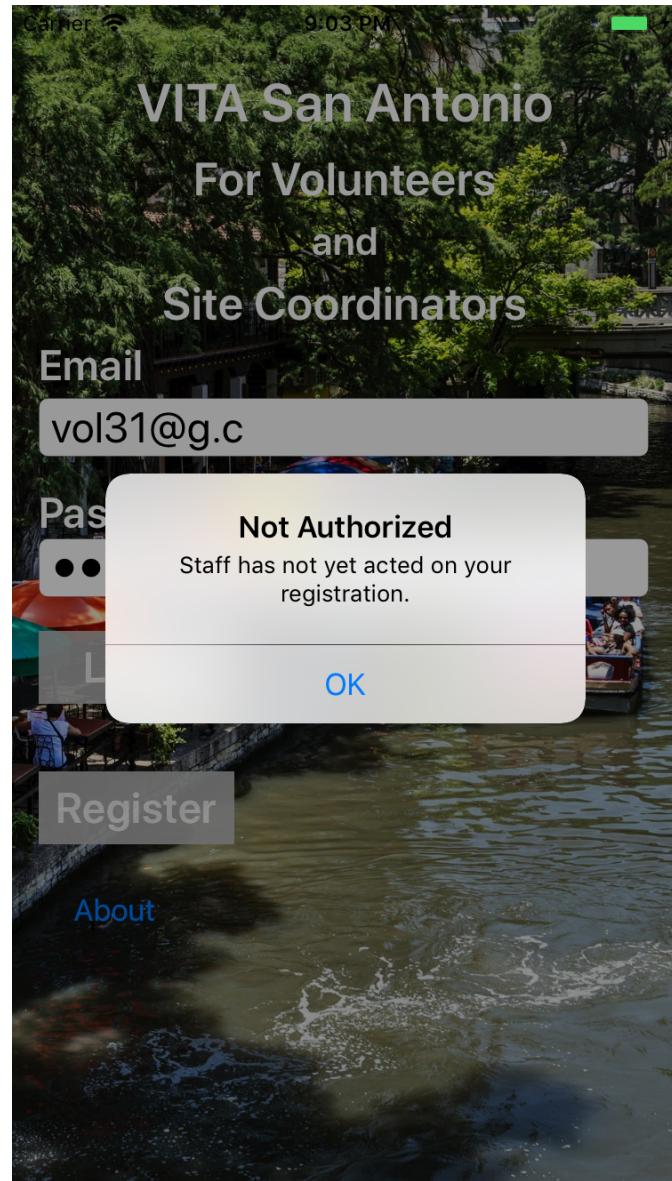
# Register

- On successful registration you see this message.
- The back office staff will then check to records to ensure you are ready for approval and enable you to access the system



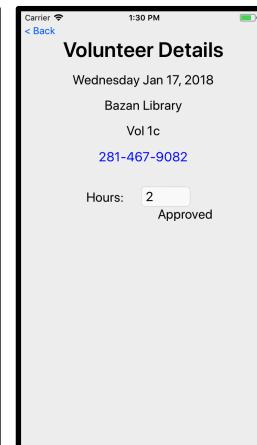
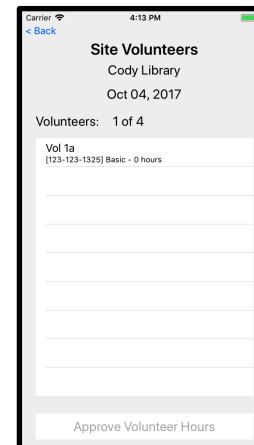
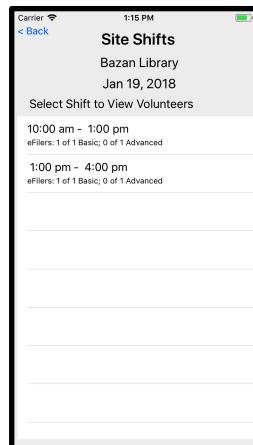
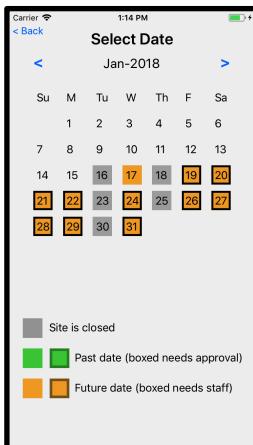
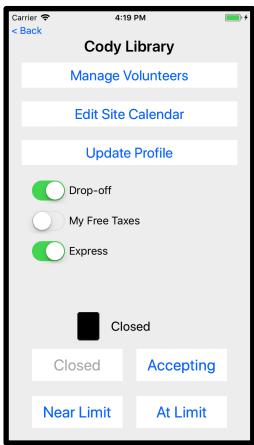
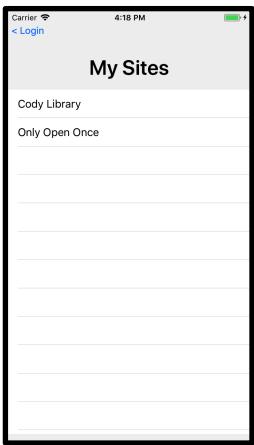
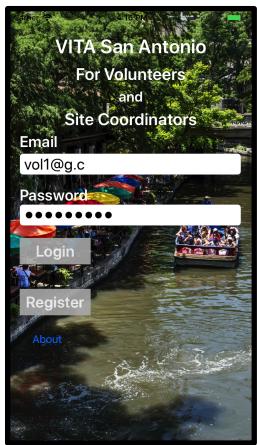
# Registration

- If you attempt to login before back office staff have approved your registration, you will see this message.





# VITA App – Site Coordinators



Select Site

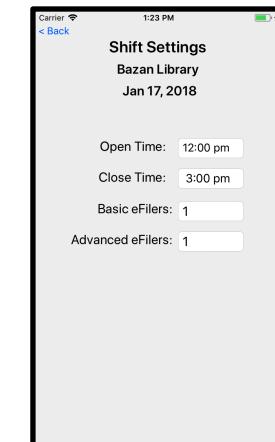
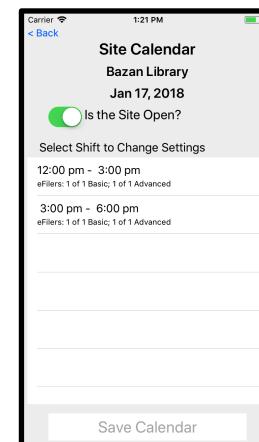
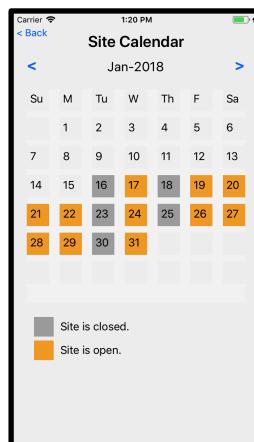
Manage

Dates

Shifts

Volunteers

Receive notifications from management office.



Site Calendar

Shifts

Shift Details



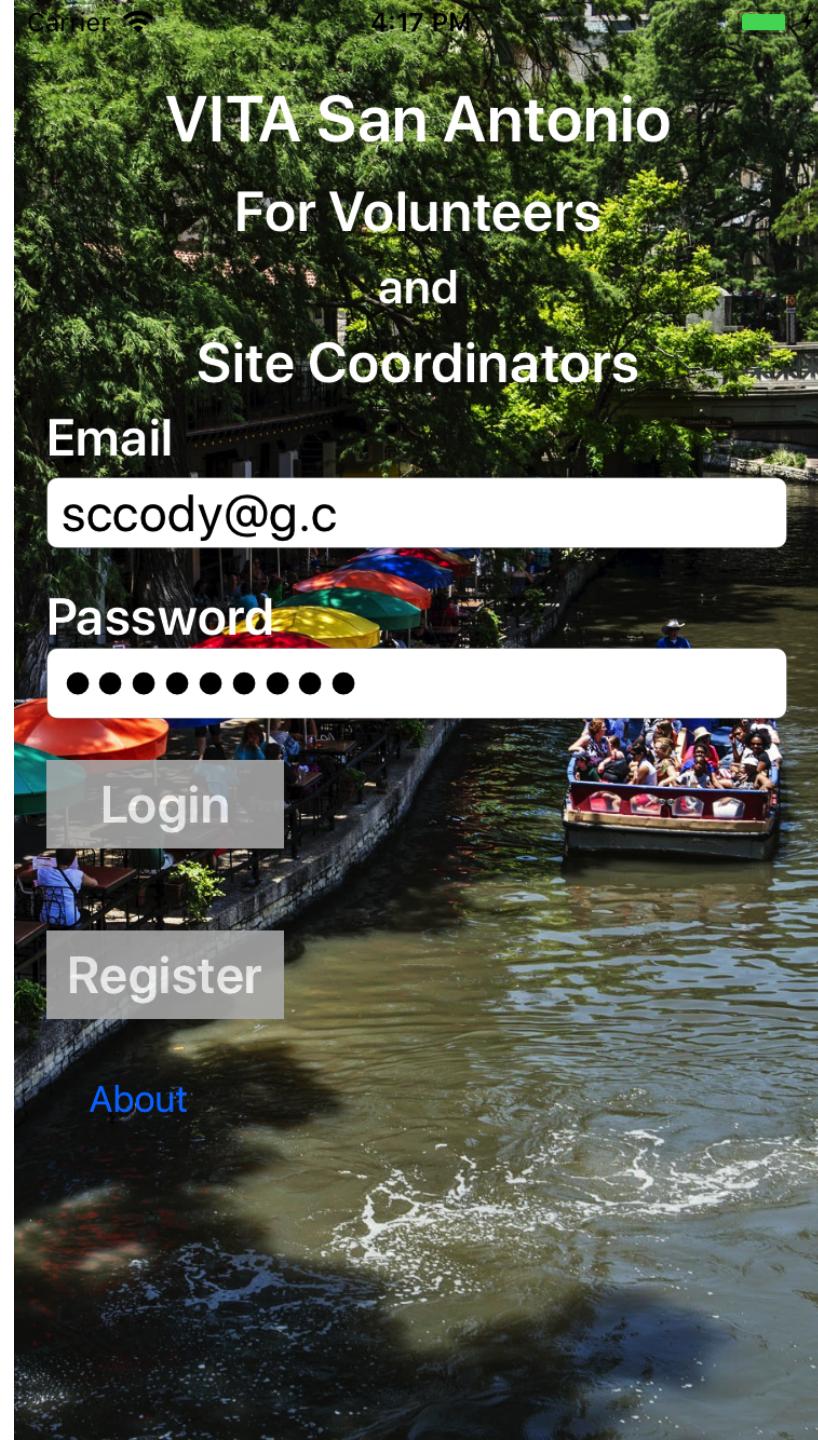
# Site Coordinator Actions

- The app supports the following:
  - Update site services
  - Update site calendar including open/closed, shift hours, and number of volunteers needed
  - Approve eFiler hours
- Only back office staff can do the following:
  - Cause a site to be open when it initially configured to be closed (with zero shifts)
  - Add or remove shifts
  - Make bulk changes to number of required eFilers across many shifts and dates



## Login

- To access any capabilities in the app, you must first login





# Login

- If you are a Site Coordinator or Backup Site Coordinator for 2 or more sites, you will see the following screen.
- Select the site to manage
- If you are Site Coordinator for only 1 site, you will not see this screen.

[<> Login](#)

# My Sites

Cody Library

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Only Open Once

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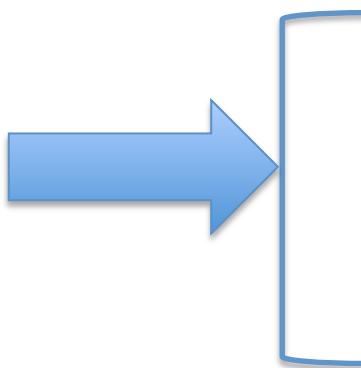
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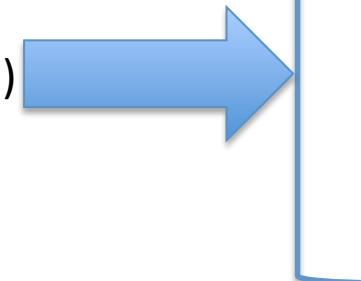
## Update Site Features

- Primary screen for managing a site
- Adjust features as needed
- Client status **not used**

Site features



Client Site Status (**not used**)



Carrier WiFi

< Back

4:19 PM



## Cody Library

Manage Volunteers

Edit Site Calendar

Update Profile

Drop-off

My Free Taxes

Express



Closed

Closed

Accepting

Near Limit

At Limit



# Update Site Calendar

Carrier

4:19 PM



< Back

## Cody Library

[Manage Volunteers](#)

[Edit Site Calendar](#)

[Update Profile](#)

Drop-off

My Free Taxes

Express



Closed

Closed

[Accepting](#)

[Near Limit](#)

[At Limit](#)





## Update Site Calendar

- Touch day of week to change site calendar

Carrier

1:20 PM



< Back

## Site Calendar

<

Jan-2018

>

Su M Tu W Th F Sa

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30 31



Site is closed.



Site is open.



## Update Site Calendar

- List of shifts on this date
- If the site was initially configured to be closed, there will be no shifts shown.
  - Contact back office if you need to be open on a date for which it was originally closed
- Use “Save Calendar” after making adjustments to open/close or shifts
- The number of shifts can only be changed by the back office staff
- Touch a shift to make changes

[<> Back](#)

## Site Calendar

Bazan Library

Jan 17, 2018



Is the Site Open?

Select Shift to Change Settings

12:00 pm - 3:00 pm

eFilers: 1 of 1 Basic; 1 of 1 Advanced

3:00 pm - 6:00 pm

eFilers: 1 of 1 Basic; 1 of 1 Advanced

Save Calendar



## Update Site Calendar

- Set open/close time for this shift on this date and this site
- Only one shift is affected
- Set number of eFilers for Basic and Advanced
- Use < Back to go to the previous screen when done.
- Be sure to save your changes

Carrier

1:23 PM



< Back

### Shift Settings

Bazan Library

Jan 17, 2018

Open Time: 12:00 pm

Close Time: 3:00 pm

Basic eFilers: 5

Advanced eFilers: 5





## View Volunteers

Carrier

4:19 PM



< Back

### Cody Library

[Manage Volunteers](#)

[Edit Site Calendar](#)

[Update Profile](#)

Drop-off

My Free Taxes

Express



Closed

Closed

[Accepting](#)

[Near Limit](#)

[At Limit](#)





## View Volunteers

- Dates in Orange are dates in the future
- Grey means the site is closed
- Orange means the site is open and is fully staffed
- Boxed Orange means the site is open and one or more shifts needs staffing
  
- Touch a date to view the shifts on that date

Carrier ⌘

1:14 PM



< Back

## Select Date

<

Jan-2018

>

Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			



Site is closed



Past date (boxed needs approval)



Future date (boxed needs staff)



## View Shifts

- List of shifts
- Quick summary of the number of volunteers for each shift currently signed up
- Touch a shift to see who has signed up for that shift

Carrier

1:15 PM



< Back

## Site Shifts

Bazan Library

Jan 19, 2018

Select Shift to View Volunteers

10:00 am - 1:00 pm

eFilers: 1 of 1 Basic; 0 of 1 Advanced

1:00 pm - 4:00 pm

eFilers: 1 of 1 Basic; 0 of 1 Advanced



## View Volunteers

- List of volunteers signed up to be at a site on a date
- Phone and certification provided
- Touch volunteer to view/change hours

Carrier

9:16 PM



< Back

### Shift Volunteers

Ed Cody Library

Jan 16, 2018

12:00 pm - 2:00 pm

Basic: 1 of 5

Advanced: 0 of 5

Vol 1k

[281-467-9082] Basic - 0 hours

Approve Volunteer Hours



## View Volunteers

- Adjust hours worked as needed
- Volunteer can change hours until end of date
- Touch phone number to call the volunteer

Carrier

1:30 PM



< Back

## Volunteer Details

Wednesday Jan 17, 2018

Bazan Library

Vol 1c

[281-467-9082](#)

Hours:

Approved



# Approve Volunteers Hours

Carrier   
< Back

4:19 PM



## Cody Library

[Manage Volunteers](#)

[Edit Site Calendar](#)

[Update Profile](#)

Drop-off

My Free Taxes

Express



Closed

Closed

[Accepting](#)

Near Limit

[At Limit](#)



# Approve Volunteers Hours

- Dates in Green are dates in the past
- Past dates are used to manage volunteer hours

Carrier 4:08 PM

< Back

## Select Date

<

Sep-2017

>

Su M Tu W Th F Sa

						1	2
3	4	5	6	7	8	9	
10	11	12	13	14	15	16	
17	18	19	20	21	22	23	
24	25	26	27	28	29	30	

Site is closed or no volunteers

Past date (boxed needs approval)

Future date (boxed needs staff)



# Approve Volunteers Hours

- Touch volunteer to view/change hours
- Be sure to “Approve Volunteer Hours”
- This will mark the hours for all volunteers are approved

Carrier

9:16 PM



< Back

## Shift Volunteers

Ed Cody Library

Jan 16, 2018

12:00 pm - 2:00 pm

Basic: 1 of 5

Advanced: 0 of 5

Vol 1k

[281-467-9082] Basic - 0 hours

Approve Volunteer Hours



## Approve Volunteers Hours

- Adjust hours worked as needed

Carrier

1:30 PM



< Back

## Volunteer Details

Wednesday Jan 17, 2018

Bazan Library

Vol 1c

[281-467-9082](#)

Hours:

Approved



# VITA SA App

*Optimize the customer experience by fully utilizing staff, sites, and volunteers.*

Encourage volunteers to go to the sites that need help.

(and away from sites that don't)

Encourage clients to use the web and provide feedback.

