

AGENCY SET-UP - DAY OF CARING

Goal: To register your 501c3 Agency online at the United Way NSV Volunteer Portal.

What is the Volunteer Portal? A website used by the United Way NSV to administrate its larger volunteer events, but Agencies can use it year-round to solicit volunteers, post events, and manage their own volunteers' hours.

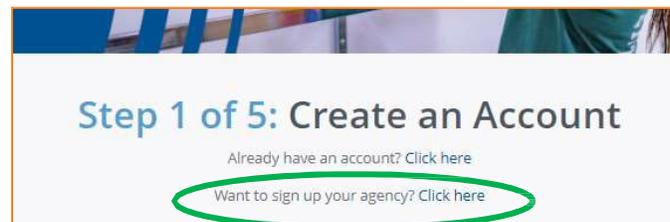
STEP 1: WEBSITE REGISTRATION

1. Open your preferred web browser (Chrome, etc.) and navigate to <https://volunteer.unitedwaynsv.org/>
2. Under the large image of two volunteers is a map with a white box. **Click on "Click here to register your organization"** to get started (*orange oval*).
3. Answer the required questions about your organization with the most current information. More fields, like social media, are available once you finish registration.
4. Click "REQUEST ACCOUNT" at the bottom. United Way of Northern Shenandoah Valley will review and then activate your Agency profile.



TROUBLESHOOTING

ISSUE- I can't find the organization registration link. You may have clicked on "SIGN UP" on the first page. You can still register from this screen! Look under the heading "Step 1 of 5" for a link (*green oval*).



ISSUE- The "REQUEST ACCOUNT" button isn't working. There may be 2 reasons it is not working. Try these, in order.

1. Scroll up and look for red outlines around missed questions. All required fields must be completed.
2. Your internet connection may be slowed and the website is still transmitting your submission. Look for a message that may say "Waiting..." or a loading line at the top or bottom of your browser.

ISSUE- I did not receive an email confirming submission. Please check your Junk/SPAM or Deleted folders. Contact DayOfCaring@unitedwaynsv.org for additional assistance, if needed.

ISSUE- What is an EIN and how do I find it? The Employer Identification Number (EIN) is a Federal ID for 990 filings, employee taxes, and 501c3 determination. Someone else in your organization likely knows the EIN. However, if not, this ID is often publicly disclosed and can be found through the IRS website:

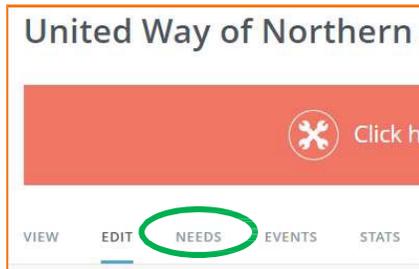
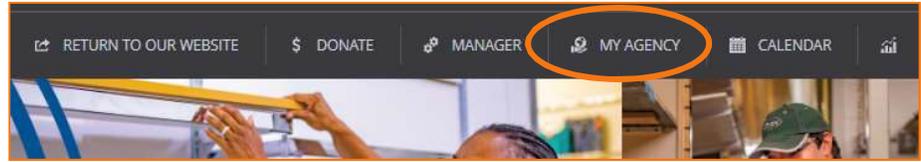
<https://www.irs.gov/charities-non-profits/tax-exempt-organization-search>

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Goal: To create a project (called "Needs") in the Volunteer Portal for Day of Caring.

STEP 2: CREATE A PROJECT FOR VOLUNTEERS

1. While logged in, go to "My Agency" in the upper right-hand of the gray menu (*orange oval*).



2. You'll come to a screen called "Dashboard" with your Agency name and a long red banner. Under the red banner is a sub-menu. Click on the word "NEEDS" (*green oval*).

The Needs screen you can manage existing Needs and create new ones. To create a new Need, click on the blue "ADD NEW NEED" button to the far right.

3. The "Create Need" screen will have a series of both required and optional fields to help describe our project for volunteers. All fields will have a **blue question mark icon** explaining the purpose of the field.

4. Your Need is listed as "Pending" until the United Way NSV volunteer committee contacts you and approves the project.

A screenshot of the 'Create Need' form. The 'Initiative' field is set to 'Day of Caring 2023'. Below it is a section for 'Initiative Questions' with three questions: 'Q. Will my agency provide lunch if requested?*' with 'Yes' and 'No' checkboxes; 'Q. What type of project site is our need located at?*' with a text input field; and 'Q. Does your project site have any photography restrictions?*' with a text input field.

Important! Be sure to select "Day of Caring 2025" in the Initiative field. This will trigger additional questions and automatically link you to the event.

TROUBLESHOOTING

ISSUE: Why is my Need Pending? The Day of Caring committee reviews all Agency Needs before it is set to Active.

ISSUE: What if I don't have all the information for my Need yet? You can always create and then edit your Need before the July 31 deadline! Creating it now will give your organization time to plan and signal your interest in participating. You may also email DayOfCaring@UnitedWayNSV.org for assistance in developing your project.