

**GivePulse Community Partner Account Functions:**

- **Maintain your Organizational Profile** to showcase who you are and what you do to the Regis community
- Manage your service learning opportunities:
  - **Access student contact information** immediately following student registration
  - **Communicate directly with student volunteers**, individually or as a group
  - **Upload necessary volunteer documents** required from students prior to service
  - **Verify student volunteer hours** online

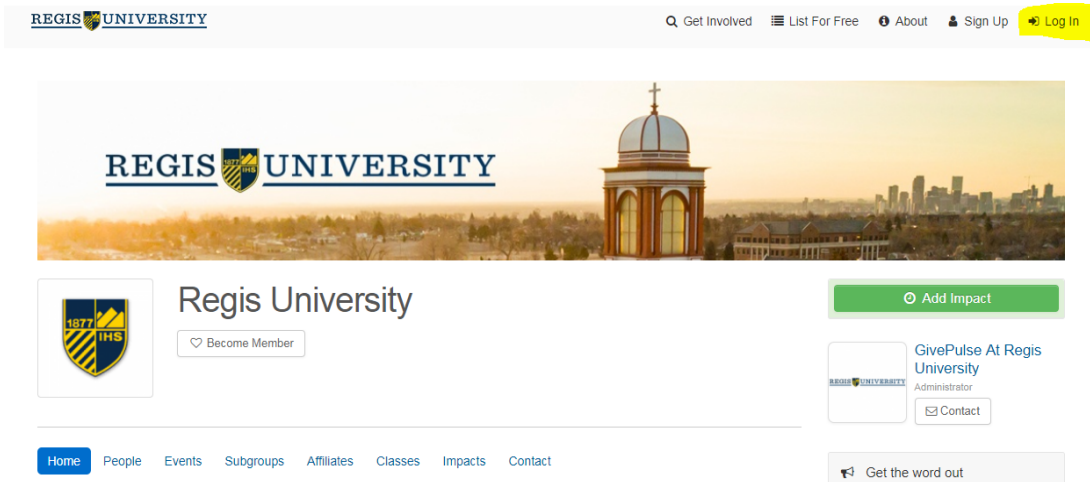
Read on to find out how to utilize all of the unique benefits of the GivePulse platform!

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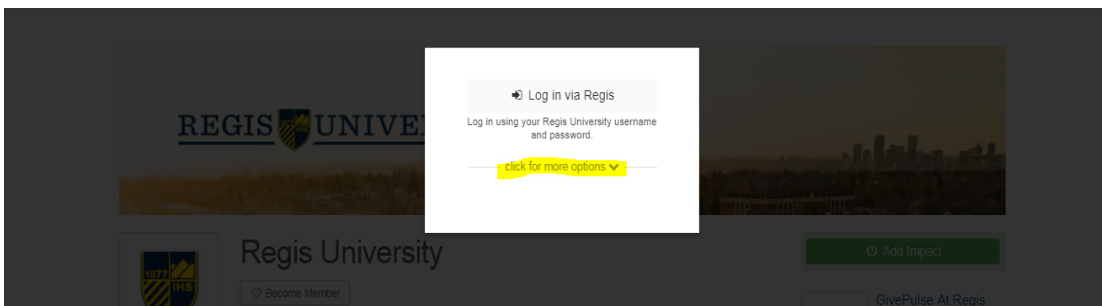
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## Logging in to Your GivePulse Account & Finding Events You Manage

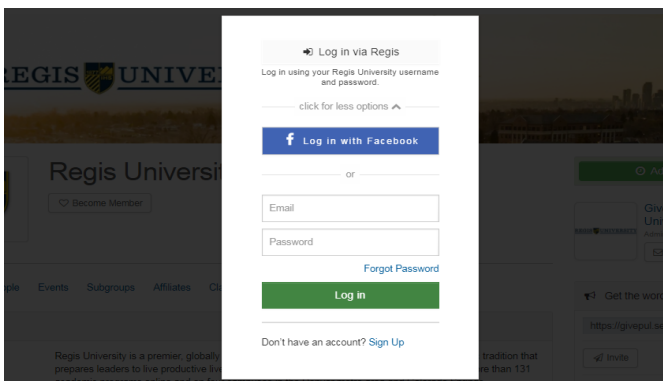
1. Type **regis.givepulse.com** into your web browser (no www or http)
2. Click **“Log In”** at the top right corner of the screen



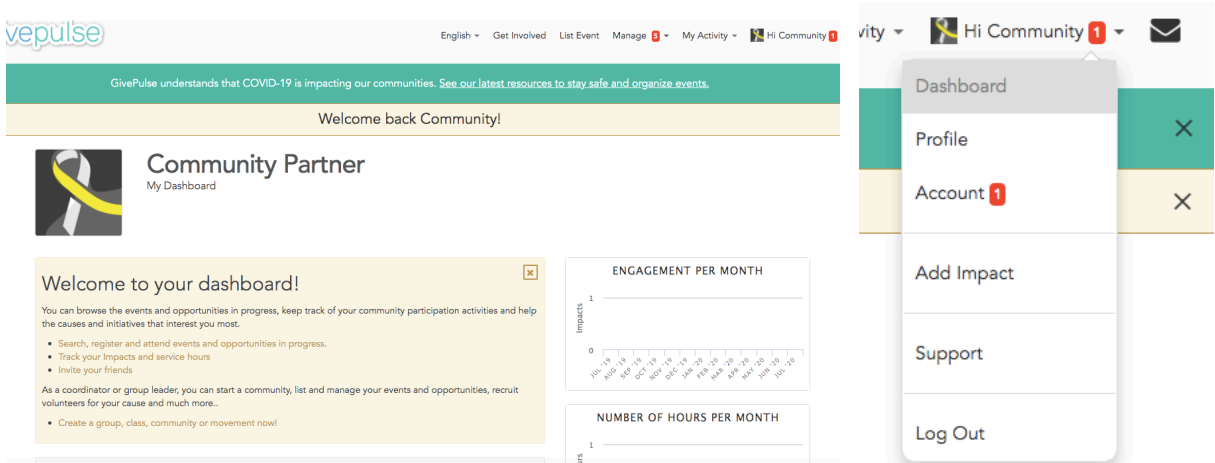
3. In the pop-up box, click **“more options”**. **\*\*DO NOT choose ‘Log in via Regis’\*\***



4. Enter your email and password.  
**\*\*If you have not yet claimed your account, select “Forgot Password” and follow the steps to change a password and log in again.**



- Once you are logged in you will be taken to the main Regis page. Click on the “Hi,...” menu option at the top right corner of the page then click on “Dashboard” to be taken to events and projects that you are managing for our students.



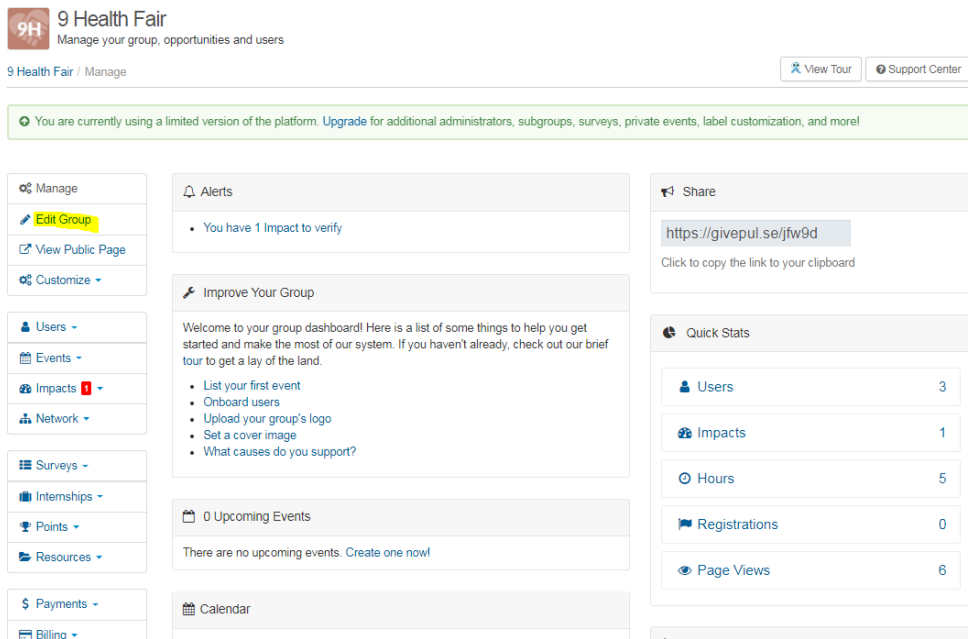
## How to Edit/Manage your Organizational Profile:

From your Dashboard:	ALTERNATELY:
<ol style="list-style-type: none"> <li>When you are on your “Dashboard”, scroll down to the “My Memberships” section. You should see a “Groups” tab. Click on your Organization.</li> </ol>	<p>Click on the “My Activity” menu (top right), then click on ‘Groups’. Click on your organization.</p>
<p>The screenshot shows the 'My Memberships' section. It has a 'Groups' tab and a 'Manage Events' button. Below is a search bar labeled 'Search By Name'. A card for 'Regis University' is displayed, showing its logo, name, a brief description, and '0.00 Hours   Last activity: never'. A blue 'Manage' button with a red notification icon is circled in blue.</p>	<p>The screenshot shows the 'My Activity' dropdown menu. It lists several options: 'Groups', 'Impacts', 'Registrations', 'Donations', 'Purchases', and 'Insights'. The 'Groups' option is highlighted with a green bar.</p>

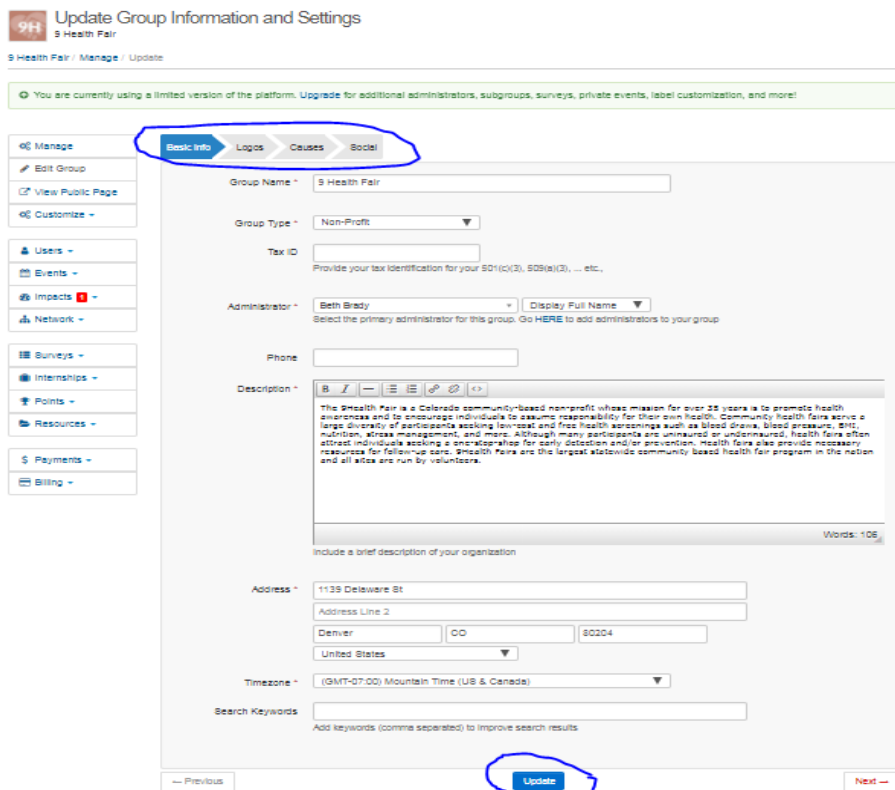
- Click on the blue ‘Manage’ button directly under your organization’s name



3. On left side bar, click on 'Edit Group'.

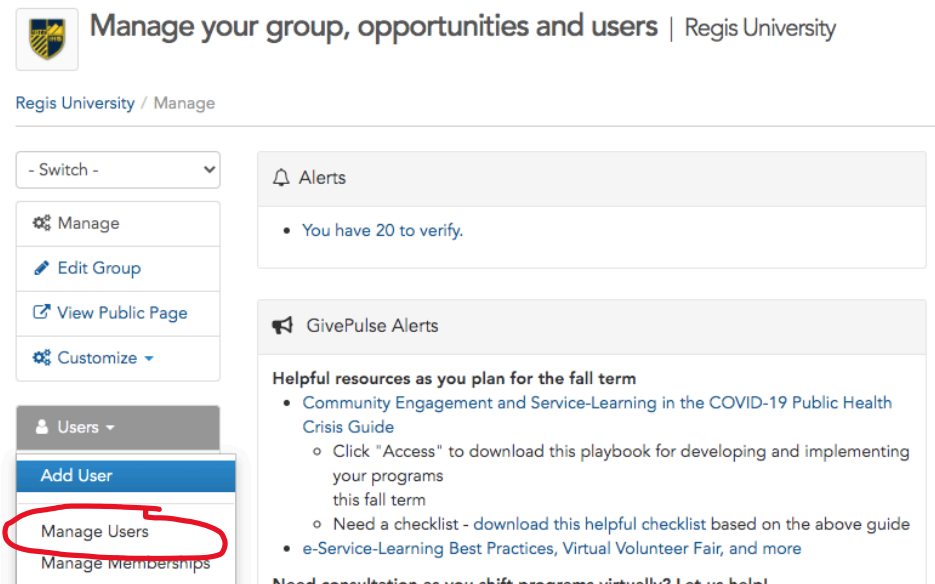


4. Review and edit information about your organization. You can use the tabs at the top to make changes/additions to your **Basic Info**, **Logos**, **Causes**, **Social** (social media links). Be sure to click on 'Update' (blue button) at bottom of each screen to save changes.

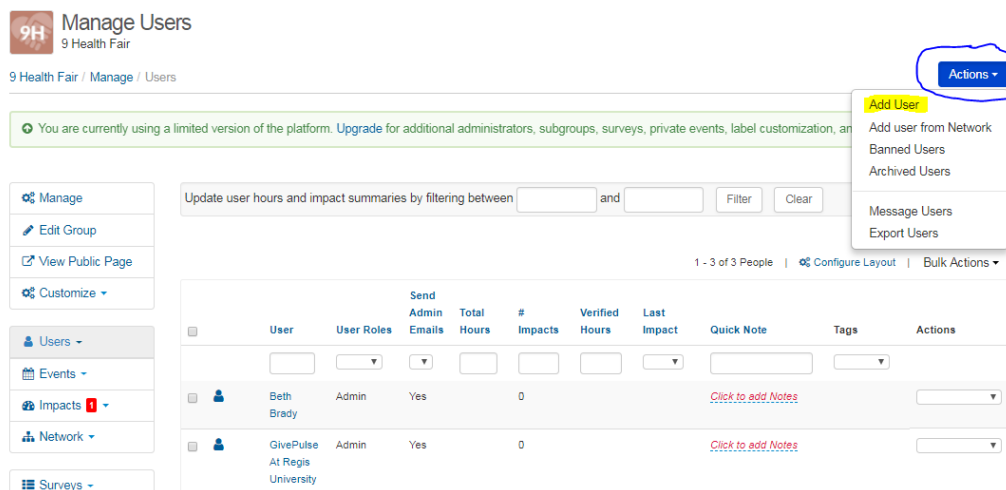


To View/Add/Change Administrative Users for your Organization:

1. Navigate to your Organizational page: “My Activity” > “Groups” >”Manage”
2. On left sidebar, go to ‘Users’ and select ‘Manage Users’ from drop down.  
\*If you simply want to add another administrator, you can go directly to ‘Add Users’ in drop down menu.



3. The ‘Manage Users’ screen will show you who has administrative capacities for your group on the GivePulse platform. To add another administrator for your organization, go to the ‘Actions’ button at the top right, and select ‘Add User’ from the drop down menu.



4. Enter the required information for your additional staff/administrator. Be sure to select **'Role'** – **'Administrator'** in the drop down menu, and then click **'Add User'** button at bottom of screen.

**Add Users**  
Health Fair

Health Fair / Manage / Users / Add Upload CSV

You are currently using a limited version of the platform. Upgrade for additional administrators, subgroups, surveys, private events, label customization, and more!

Manage  
Edit Group  
View Public Page  
Customize

Users -  
Events -  
Impacts -  
Network -  
Surveys -  
Internships -  
Points -  
Resources -  
Payments -  
Billing -

Add a user with the form below, or upload a CSV of multiple users here.

First Name \*  
Last Name \*  
Role \* Administrator  
Email  
Send Welcome Email \* Yes  
By default, the added user will receive a welcome email (with a link to claim their account if they are new to the platform).  
Password  
Optional. If you do not set a password, a random system password will be generated. Note that if the user is already on the platform, their password will not be updated.  
Primary Phone #  
Gender Please Select  
Tshirtsize Please Select  
External ID  
ie: Student ID, Employee ID, etc.

Add User Reset

5. To remove an administrative user from your organization, click the box beside that 'User' and then select **'Archive Member'** from the drop down menu on the far right side of that user.

<input type="checkbox"/>	User	User Roles	Currently Enrolled	Actions
<input type="checkbox"/>	Brenda Whetstone	Has Admin Role		
<input type="checkbox"/>	Brenda Whetstone	Admin, Member, Event Manager, Participant, Registrant, Referral	No	<ul style="list-style-type: none"> <li>Message User</li> <li>Resend Claim Account Email</li> <li>Add Note</li> <li>Upload Document</li> <li>Add Impact</li> <li>Print Transcript</li> <li>Export Impact</li> <li>View Details</li> <li>Profile</li> <li>Remove Member Role</li> <li>Remove Admin Role</li> <li>Remove Event Manager Role</li> <li style="background-color: #007bff; color: white;">Archive Member</li> </ul>

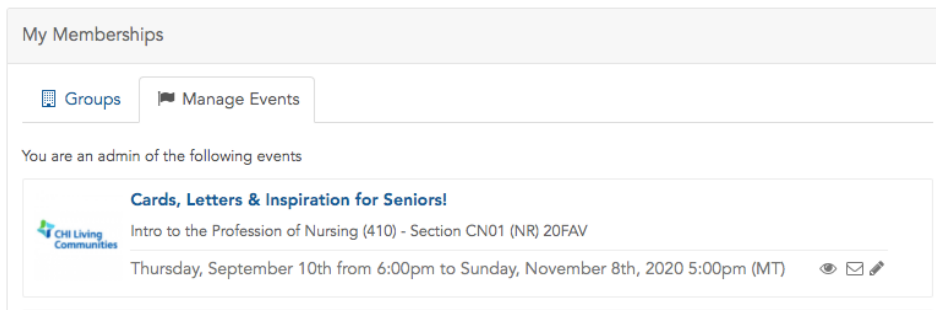
\* User Quick Notes are visible to all administrators.  
 \* GivePulse Impacts = Impacts recorded on the platform  
 \* Total Impacts = Impacts recorded with your Group, Club, Organization, it's subgroups and its affiliates  
 \* Group, Club, Organization Impacts = Impacts recorded with your Group, Club, Organization  
 \* When selecting "Impacts Data Between" and "Show Everyone" in the filter bar, the layout displays all active users from all time and updates their impact to the date range selected.

## Student Volunteer Management:

- All service learning placements are referred to as **'Events'** in the GivePulse system.
- Each student group placed at your organization for service learning will be registered under an **'Event'** for which you are an **'Event Manager'**.
- You can access all student volunteer management functions through the events for which students are registered.

### Accessing and Managing your Service Learning Events:

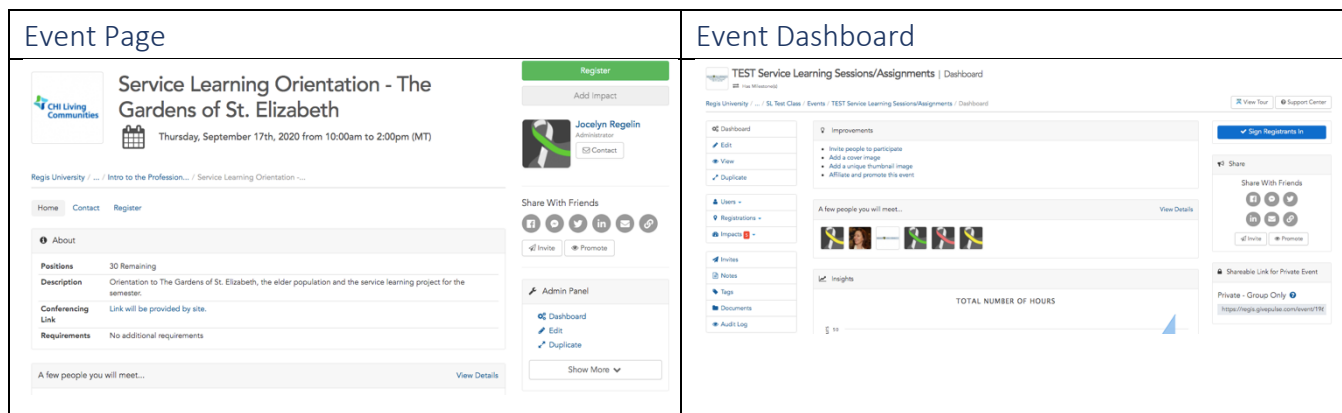
1. From your Dashboard (in “Hi,... Menu), scroll down to **“Memberships”** and click on **“Manage Events”**. This will take you to a page showing all ‘Events’ (i.e. service learning placements) for which you are a supervisor. \* Service Learning Event titles will include your organization’s name, ‘service learning’ and/or the specific student group.



### Admin Panel & Event Dashboard

There are two locations where you can manage your event. The **‘Admin Panel’** and **‘Dashboard’** for your event. You will find the **‘Admin Panel’** on the right side of your event page. Click on the **“Show More”** drop down to the various actions you can perform. From the **‘Admin Panel’**, click on **“Dashboard”**.

In both of these locations you can message students, pull registration lists and verify impacts.



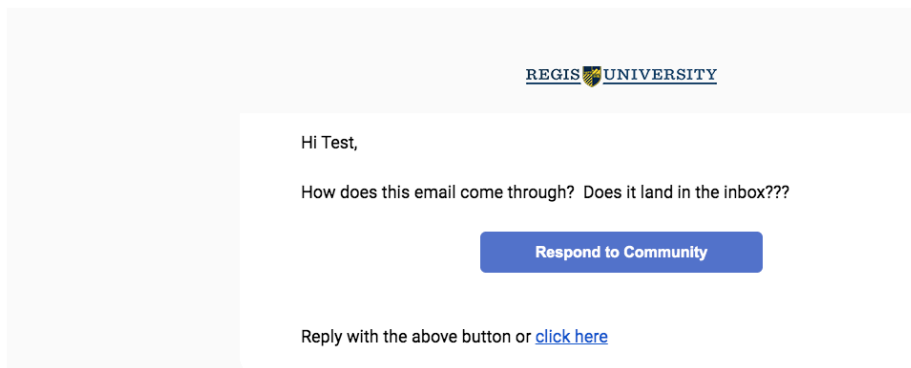
Admin Panel Detail	Navigate to Dashboard	Dashboard Detail
<p>Show More ^</p> <p>Note: These links will soon be moved to the Manage Event page (currently in beta).</p> <ul style="list-style-type: none"> <li>Manage Users</li> <li>Message Registrants</li> <li>Impacts</li> <li>Registrations</li> <li>Reservations</li> <li>Manually Register User</li> <li>Sign Registrants In</li> <li>Invites</li> <li>Invite Registrants</li> <li>Notes &amp; Admin Fields</li> </ul> <hr/> <ul style="list-style-type: none"> <li>Export Registrants</li> <li>Export Calendar</li> </ul> <hr/> <ul style="list-style-type: none"> <li>Audit Log</li> </ul>	<p>Admin Panel</p> <ul style="list-style-type: none"> <li>Dashboard</li> <li>Edit</li> <li>Duplicate</li> </ul> <p>Show More ^</p>	<ul style="list-style-type: none"> <li>Dashboard             <ul style="list-style-type: none"> <li>Edit</li> <li>View</li> <li>Duplicate</li> </ul> </li> <li>Users</li> <li>Registrations</li> <li>Impacts 5</li> <li>Invites</li> <li>Notes</li> <li>Tags</li> <li>Documents</li> <li>Audit Log</li> </ul>

### Using GivePulse to Message Students

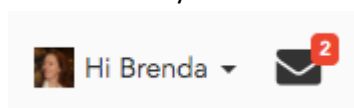
- From the event page “Admin Panel”, click on “Message Registrants” OR from the event Dashboard, “Registrations”, then “Message Registrants”.
  - Emails sent through GivePulse will be addressed from your organization (Regis University) and will go into the “Other” inbox in Outlook. Students may need to be directed to look there. Using Message Registrants will email *everyone* registered – you will not be able to select specific students this way.

Test email from CP Inbox x

 Community Partner (Regis University) <notification@givepulse.com> [Unsubscribe](#)  
to whetstone.b.c+TU3

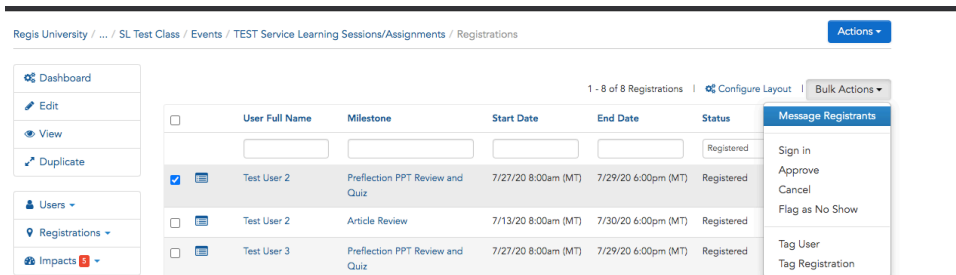


- Students can reply via the email. You will see a notification in the main menu and you should receive an email notification if you have notifications turned on in your profile.

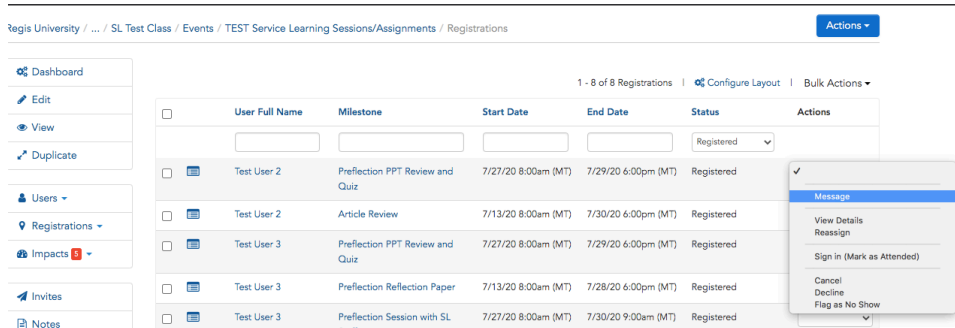




3. To message specific students through the platform, navigate to the event page, “Admin Panel” or event dashboard “Registrations” > “Manage Registrations”
  - a. To message several but not all students:
    - i. Check the box beside the students you want to message
    - ii. In the “Bulk Actions” menu, select “Message Registrants”

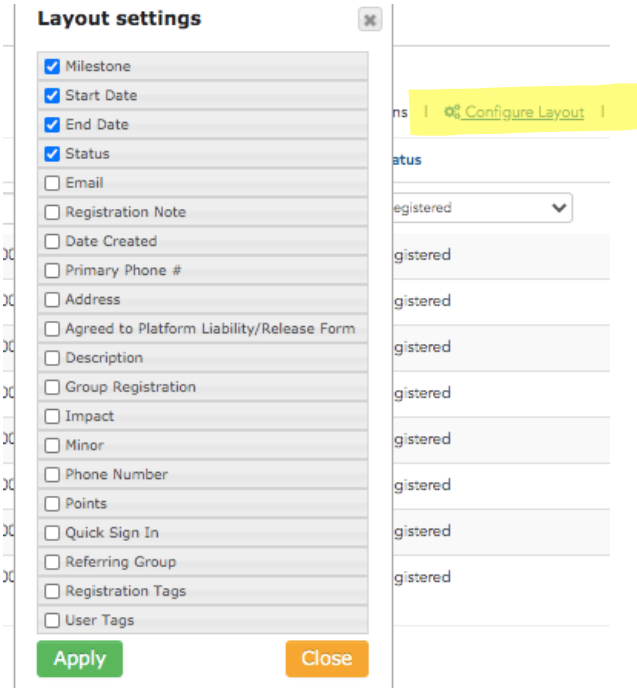


- b. To message individual students:
  - i. Click the drop-down menu on the right side of the student row
  - ii. Select “Message”



### Pulling Registration Lists

1. On the Registration page, click on the **“Configure Layout”** button above the list of students.
2. Select the information you wish to download.
3. Click **“Apply”**.
  
4. Above the list of registrants, click the blue **“Actions”** button and select **“Export”**.



TEST Service Learning Sessions/Assignments | Manage Registrations

Regis University / ... / SL Test Class / Events / TEST Service Learning Sessions/Assignments / Registrations

- Dashboard
- Edit
- View
- Duplicate
- Users

	User Full Name	Milestone	Start Date	End Date	Status	
<input type="checkbox"/>					Registered	
<input type="checkbox"/>	Test User 2	Preflection PPT Review and Quiz	7/27/20 8:00am (MT)	7/29/20 6:00pm (MT)	Registered	
<input type="checkbox"/>	Test User 2	Article Review	7/13/20 8:00am (MT)	7/30/20 6:00pm (MT)	Registered	

1 - 8 of 8 Registrations | **Actions** -

- Manually Register User
- Message Registrants
- Export**

You can select how much information you want to download. If you configured the layout, select **“Visible Columns”**. A (.csv) file will download.

### Export Registrations

What data would you like to export?

- All Data
- Visible Columns
- Registrants

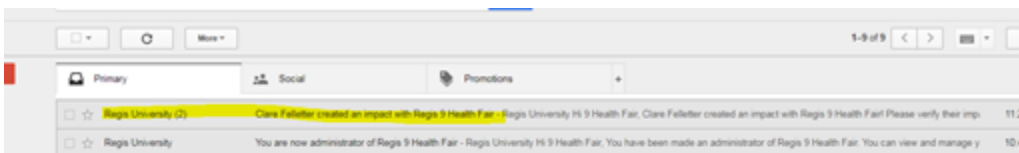
**Export** **Close**

## Verifying Impacts

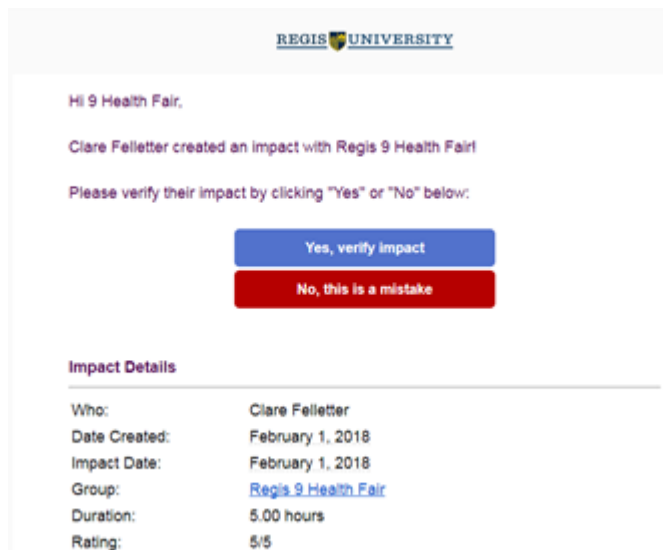
There are multiple ways to verify student service hours (impacts) in GivePulse, via email notification or via the platform.

Verifying Impacts by Email Notification: As long as your administrator notifications are turned on, you will be able to approve student impacts via email. You will know you have impacts to approve when you receive an email from the platform - *the sender is Regis University*. **Please note that this is the easiest way to verify impacts on the GivePulse Platform.**

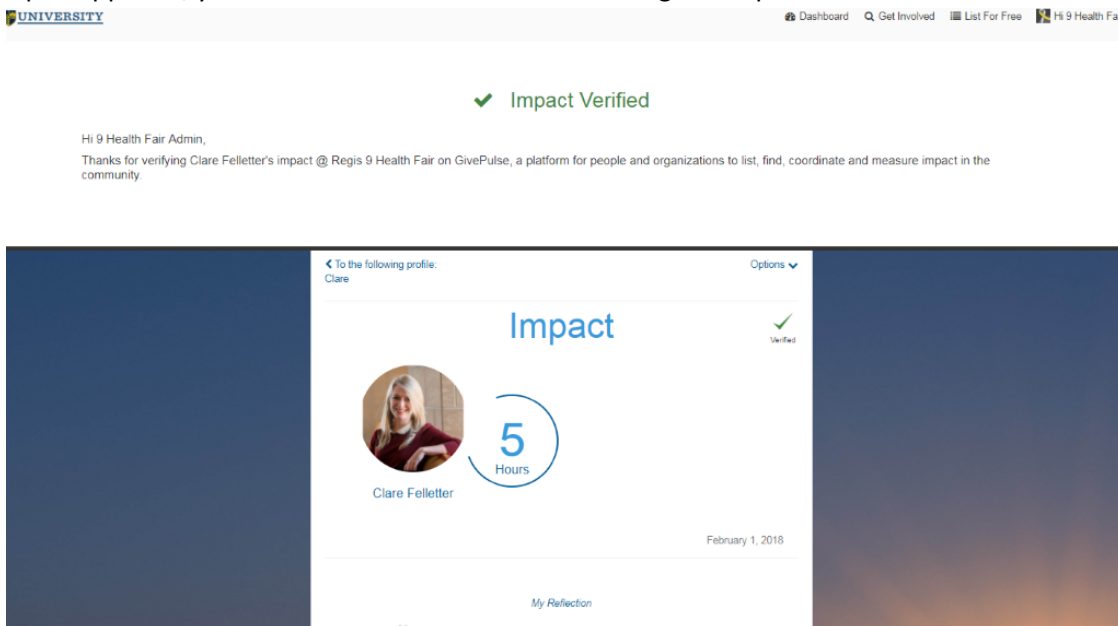
**\*If you would like to disable email notifications, please contact Brenda Whetstone at [bwhetstone@regis.edu](mailto:bwhetstone@regis.edu).**



1. Open the email and click **“Yes, verify impact”** if the impact is correct. If it is not correct, or if you would like to make changes to the impact, click **“No.”** This will activate the ‘Dispute impact’.



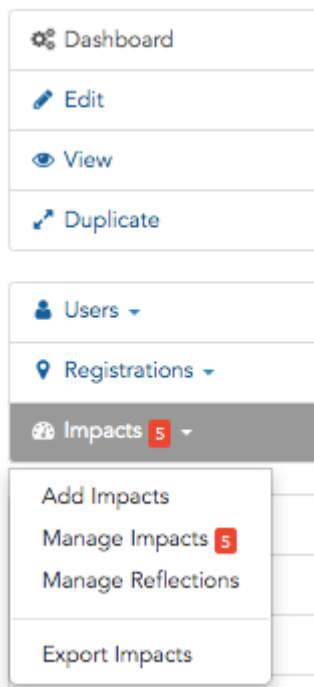
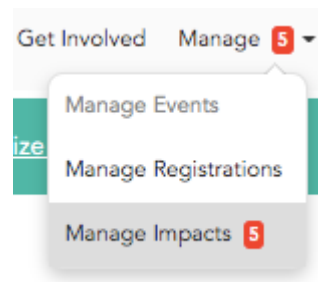
- Upon approval, you will be taken to a screen confirming the impact has been verified. **Done!**



Verifying Impacts via GivePulse:

There are multiple places within the platform to see and verify student impacts, via the main menu and on the event page.

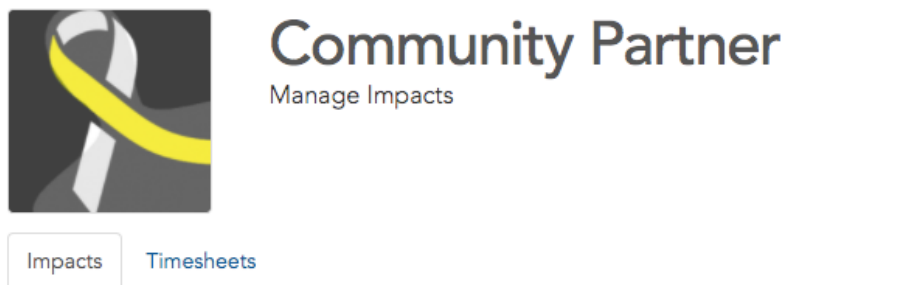
- Main Menu:** In the upper right of the screen, you will see a “Manage” button. There will be a red square with a number in it beside “Manage” if you have impacts that are waiting to be verified. Click in that menu, look for “Mange Impacts”.



- Event Page:** On the event page, in the “Dashboard”, you will see “Impacts”. There will be a red square with a number in it beside “Manage” if you have impacts that are waiting to be verified. Click on “Manage Impacts” to be taken to the list of impacts.

### Impacts and Timesheets View & Verifying Impacts

When you are looking at the Impacts page, you will see two tabs, “**Impacts**” and “**Timesheets**”.



**Timesheets:** This is a feature that allows students to input hours on a form that looks like a timesheet. They can list each task and # of hours spent by day, then submit them all at once rather than log each day separately. In the “**Timesheet**” tab, you will see a single listing of hours that the student submitted on one timesheet. (The individual impacts will be listed on the “**Impacts**” tab.)

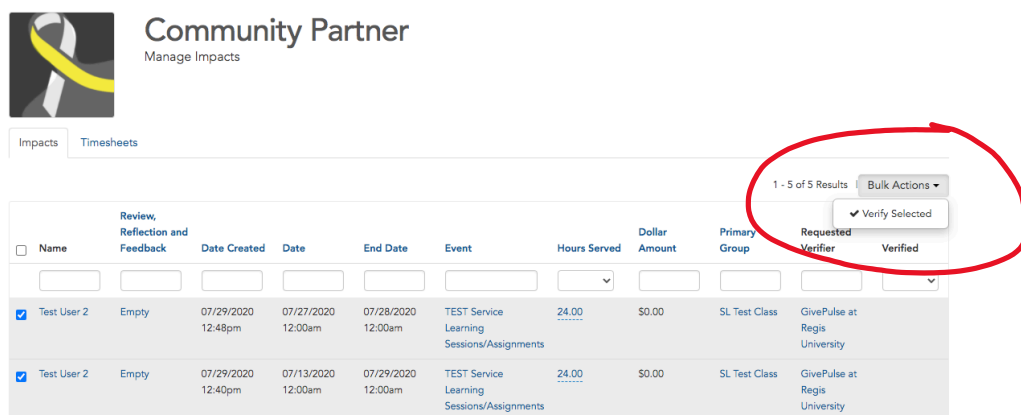
**Impacts:** This lists every impact that a student submitted for verification, either individually or on a timesheet.

You can choose to *verify impacts via either method*. When you verify a timesheet, all the impacts listed on the “**Impacts**” tab will now show “**Verified**” under the “**Verified**” column. The same happens if you verify all the individual impacts – the Timesheet will show as “**Verified**”.

### Verifying Impacts

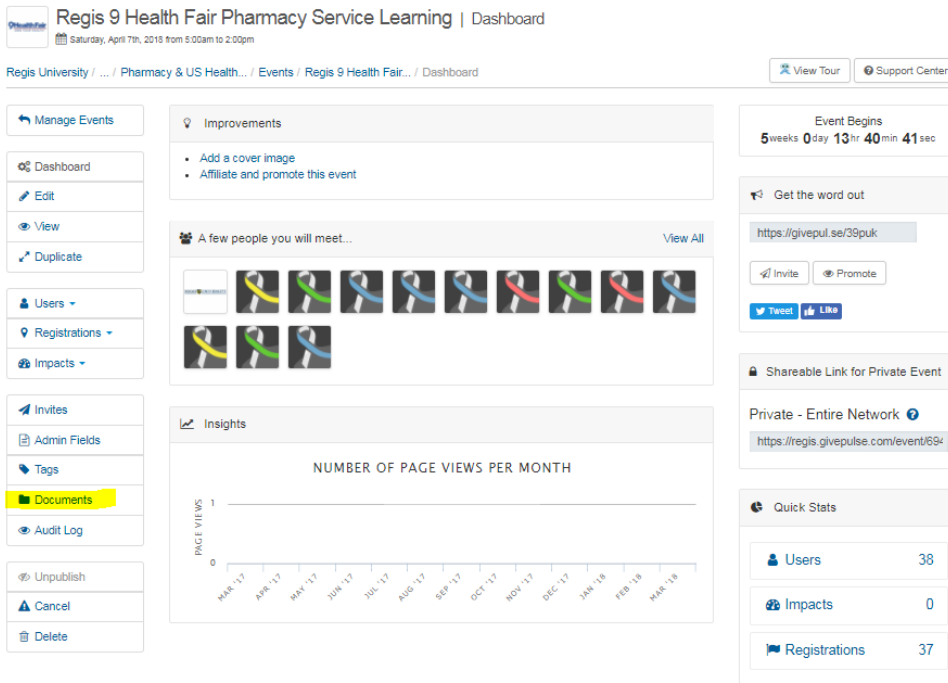
You can verify impacts individually or all at once.

- **Individually:** Use the “**Actions**” drop-down menu on the far-right of the row and select “**Verify**” for individual impacts. (You may need to use the scroll bar at the bottom of the impacts window to scroll to the right to find the “**Actions**” column.)
- **Bulk:** Click the check box by “**Name**” to select all impacts. Under “**Bulk Actions**”, click “**Verify Selected**”.
- **You have now successfully approved the impacts!** A notification will be sent to the student that their impacts have been verified.

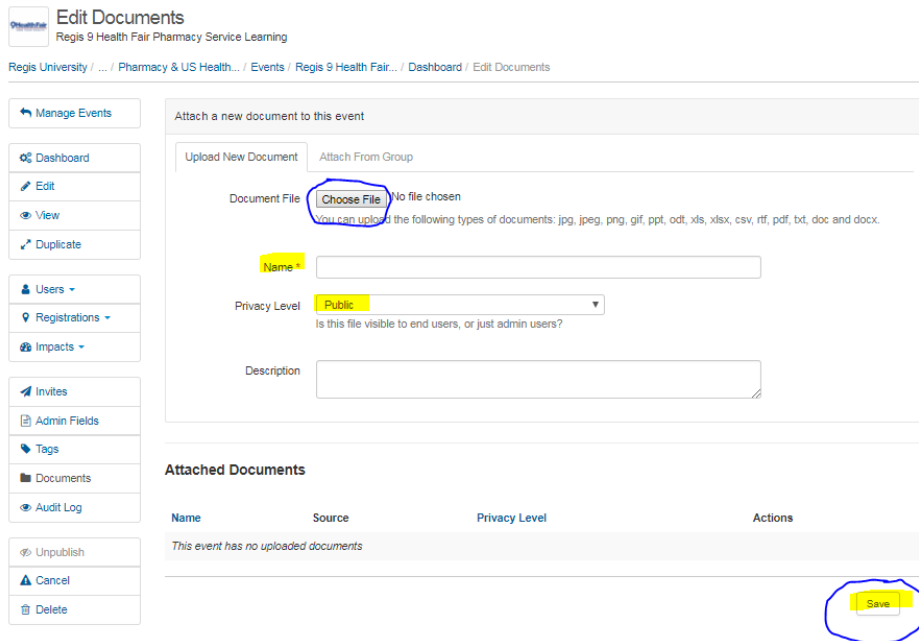


## Volunteer Paperwork: How to Upload required documents for student completion

1. From Event Dashboard, Select **'Documents'** on left side bar.



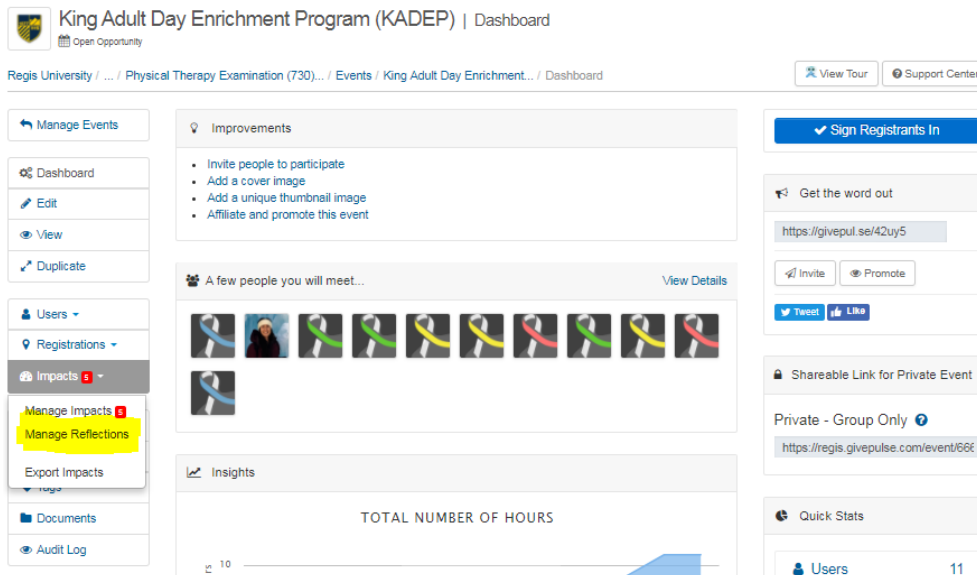
2. Upload document. Provide name for document and description as desired. Ensure **Privacy Level** is set to **'Public'**, and click **'Save'** at bottom right of screen.



To view/respond to student reflections:

As students complete their service hours, they may include a reflection on their time with your organization. If you would like to read and/or respond to their reflections, follow these steps:

- a) Go to 'Impacts' drop down on left hand side bar, and select 'Manage Reflections'



- b) From here you can view student reflections, and send responses/comments to individual students by clicking on 'comment' link at bottom right of each reflection.  
 \*You can also verify impacts from this screen.

