



## Instructions

### Nonprofit Organizations Using New GuideWell Gives Portal

#### Background

Florida Blue is a part of the GuideWell family of companies whose shared mission is to help people and communities achieve better health. GuideWell Gives is the name of our employee giving program that engages all 18,000 GuideWell employees across the country and in Puerto Rico in the communities where they live and work. The GuideWell Gives portal helps our employees find volunteer opportunities in their community, create team building opportunities for their team members, share volunteer opportunities and experiences, and log their volunteer hours, all in one place.

Our nonprofit partners are vital to the success of GuideWell Gives. We want our employees to know about the great work of your organization and the volunteer opportunities that you have!

#### **TIPS & NOTES FOR YOUR ORGANIZATION'S PROFILE**

- Follow simple process below to set up a profile and enter volunteer opportunities.
- Be sure to add big group volunteerism for team building events.
- Donation drives are NOT volunteer opportunities that you can submit.
- Our team members are looking for hands-on volunteer activities to serve their communities.

#### URL to Portal

[GuideWell Gives Portal Nonprofit Login](#)

Click here to set up a new profile and then whenever you log into your existing profile.

#### 5-Steps to Setting Up Your Organization's Account in Portal

1. Once you click on the URL to enter the portal, click on "Register an Account" to set up your organization's profile.
2. Complete all information on Registration page. Click submit and an automated message will go to your email to activate that email address.
3. Once your email is activated, you will be sent to a Log In page. **IMPORTANT:** Choose the "**Standard Login**" option, enter the email address and password you used to register your account, then click the "Log In" button. (Do not use the "Front Door" option to enter the GuideWell Gives portal.)
4. You'll be taken to the Welcome page! From there you can edit the contact info on your profile or submit volunteer opportunities for GuideWell team members to see and register.

#### **TIPS & NOTES FOR THIS PAGE**

- Access and approval to the portal is connected to individual email addresses. If you have multiple people in your organization who will be setting up volunteer opportunities for the GuideWell team, each employee in your organization will need to register an "account" in this portal linked to their own email address.
- To change information about your organization, be sure to click on the hyperlinked "Organization Information" in your welcome message.

## 5-Steps to Setting Up a Volunteer Opportunity for GuideWell Employees

1. At the Welcome page, after you've logged in to the portal, click the "Suggest a Volunteer Opportunity" button.  
Also, note on this page, you'll see any opportunities you have not yet submitted for approval and events you've submitted in the past.
2. The "Suggest a Volunteer Opportunity" button will take you to the "Organization Information" page. Be sure all of your information is correct there, including the web address you would want volunteers to visit to find out more about your work. Click "Save and Proceed" button at the bottom when you're finished.
3. You'll now see the "Volunteer Opportunity Information" page. Complete all the information in order to ensure employees have all of the right details. (*Be sure to add any large-group volunteer opportunities our departments can find as team building events.*) Some key things to note for maximum success:
  - a. Choose a catchy title for your opportunity that will attract the most employees.
  - b. **\*Important** – Under Event Frequency please use One-time or Ongoing only, **Do Not use Recurring.**
  - c. Be succinct with your description because you have a limited number of characters but clear enough for employees to get excited to join.
  - d. Upload an impactful photo, if available, to connect GuideWell employees with the work they will do as a volunteer.
  - e. In the "Skills" and "Interests" drop down menus, you can make more than one selection by holding the "control" key on your keyboard while clicking all of the skills or interests that apply to your volunteer opportunity submission.
4. Click "Save and Proceed" button when your Volunteer Opportunity Information page has everything included. You'll be taken to the "Review Your Application" page. If it's correct, click "Submit" at the bottom of the page so that the Volunteer Opportunity will be sent immediately to the GuideWell Gives team for approval. Or...
5. You can choose "Save Only" option for this Volunteer Opportunity to go into your "Not Yet Submitted" portion of your profile until you're ready to "Submit" it for approval.

## Other Actions in GuideWell Gives Portal

### SEE HOW MANY VOLUNTEERS HAVE REGISTERED IN THE PORTAL

Once you're logged in to your account, at the bottom of the Welcome page, you'll see "Submitted Opportunities I Created." On the far-right side of that opportunity you'll see the "Volunteers" box and the quantity of registrants.

### FIND NAMES OF GUIDEWELL VOLUNTEERS WHO'VE REGISTERED

Go to the "Volunteers" box to the right of your "Submitted Opportunities I Created" list, at the bottom of the Welcome page. Click on the Volunteers box for the opportunity you want to see registrants, and the list of names will show.

### E-MAIL REGISTERED VOLUNTEERS

Find the Opportunity you've submitted at the listing in the bottom of your Welcome page. Click "View" on the far left of the opportunity where you want to e-mail registrants. Once inside the opportunity record, scroll to the bottom to see a "Select Action" pull-down menu. Select "E-mail Volunteers" and "GO" and then an email will automatically populate.

### UPDATE YOUR ORGANIZATION INFORMATION

On the Welcome page, select the "Organization Information" hyper link in the top paragraph. Ensure all the fields with an asterisk are completed. Providing your organization's "Mission Statement and History" and website address will ensure our GuideWell employees understand how you solve key social issues they care about.

### CLONE A VOLUNTEER OPPORTUNITY

Instead of re-entering all the data for submitting future volunteer opportunities, you can easily clone an opportunity you've previously submitted. Find the Opportunity you've submitted at the listing in the bottom of your Welcome page. Click "Clone" on the far left of the particular opportunity. Click "Submit" when the form is completed.