

VOLUNTEER APP USER MANUAL

IOS 3.7 Version

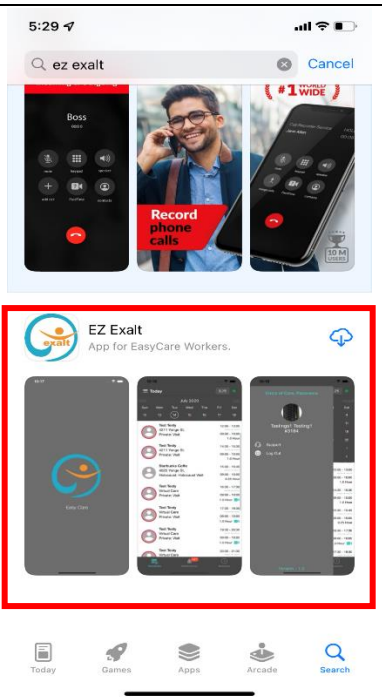
January 2022

The Volunteer Mobile App (IOS)

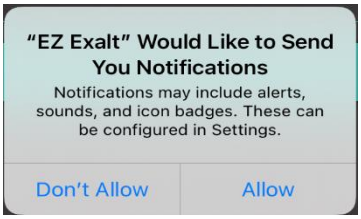
*The minimum iOS version required for the app is **iOS 13**. iPhone 6s and above can run iOS 13.

Install the App

Find the "EZ Exalt" app in the app store and install it on your phone.



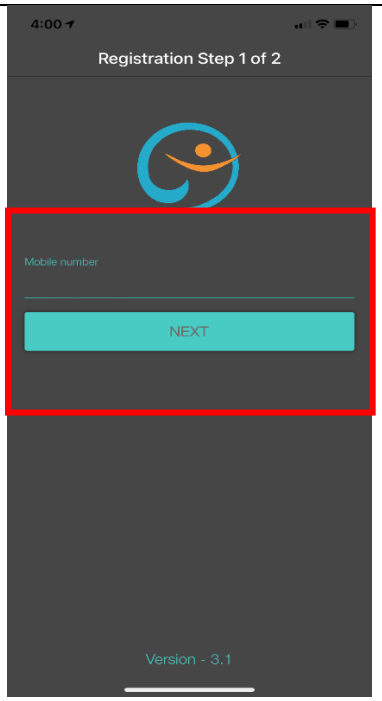
When open the app for the first time, it will ask for permission to send you notifications. Select "Allow."



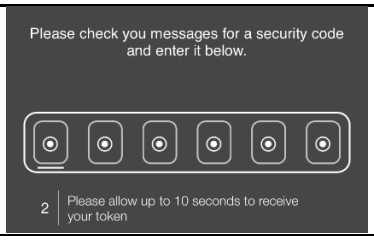
Registration

To start, you will need to register your cell phone number with us. Make sure your number is entered correctly on the screen, then tap the next button to verify it.

If you can't verify your number, contact the IT helpdesk at: 647-943-1332.

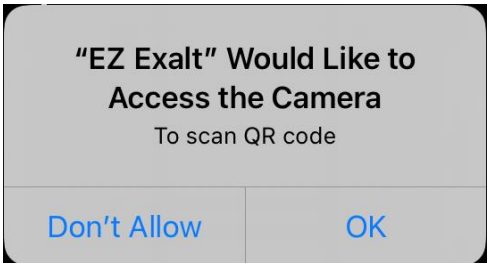


Check your text message for a 6-digit security code and enter it.

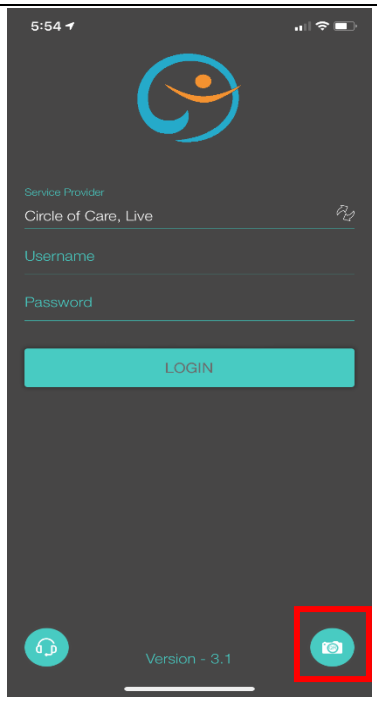


Login

Tap the camera icon on the screen - a pop up window will appear, tap “OK” to open up the camera.



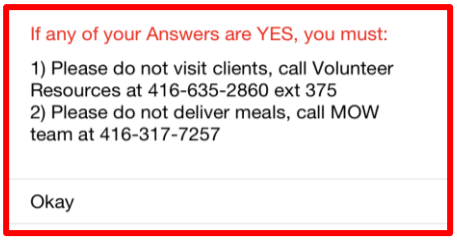
Point the camera to the QR code on the back of your ID badge and hold steady for a few seconds to scan the code. Once successfully scanned, you will automatically enter the app.



Self Screener

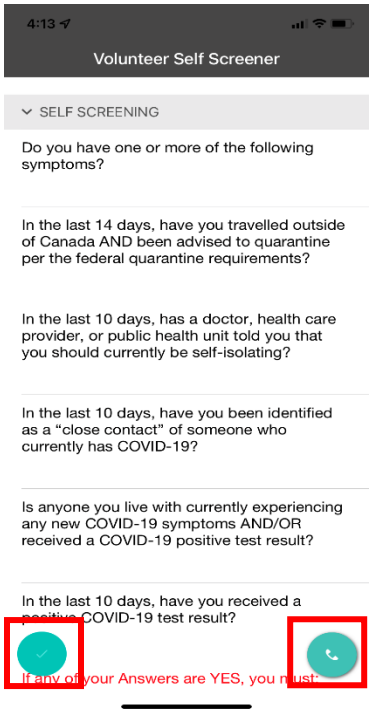
A COVID-19 screener will pop up if you have any in-person visit scheduled for the current day. Once it pops up, you MUST complete it to be able to continue using the app. Tap each of the screening questions and choose an appropriate response. Your answers should be based on your condition before any visits of the day.

The last tile is a reminder that if any of your answers are "yes", contact Volunteer Resources/MOW team and do not proceed to any client.



If none of your answers is "yes", tap the green check mark button on the bottom left to complete the screener.

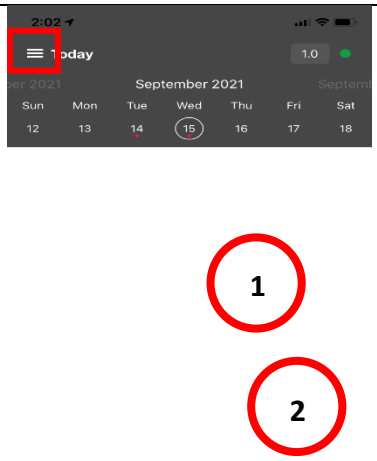
Note: If you don't have any in-person visit on the current day, the self screener won't show.

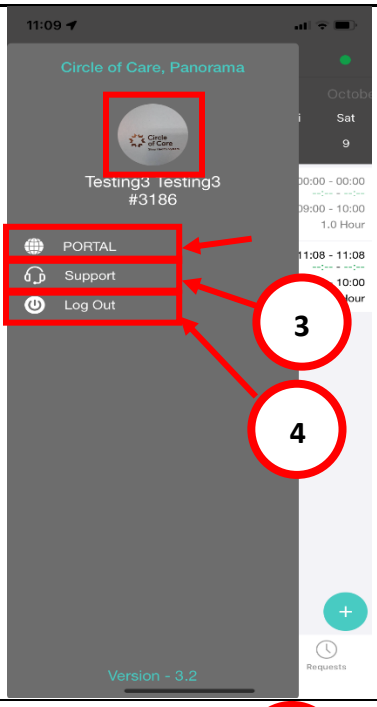


Main Menu

The three line icon on the upper left opens the main menu.

1. User Information
2. Access to the volunteer portal: use the login credential that was given to you by the Volunteer Resources staff
3. Shows the contact numbers of IT Helpdesk and Call Center
   IT Helpdesk: contact if having technical issues with the app
   Call Center: contact in case of client emergency only
4. Logs you out of the application

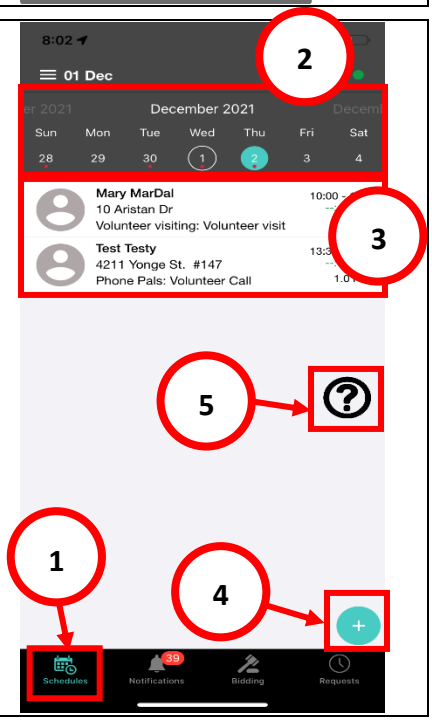




Schedule Center Overview

The schedule center is the first page you see when open the app.

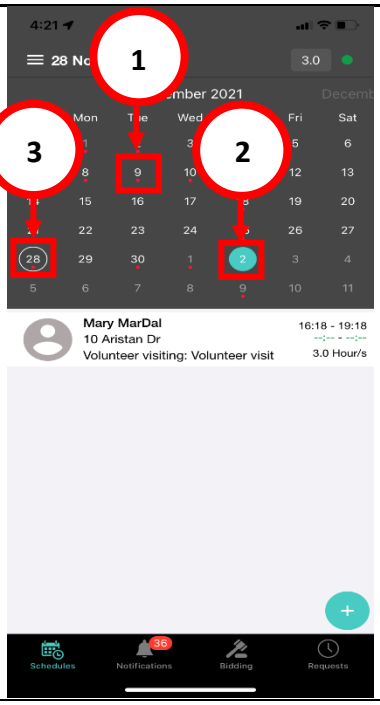
1. Schedule Center Icon: allows you to access the Schedule Center
2. Calendar: your calendar
3. Scheduled Visit List: any visits or phone calls scheduled for the selected day
4. New Calendar Item Button: allows you to create a new calendar item
5. WalkMe: a self-learning tool that provides you with live guidance to complete tasks on your phone



Calendar

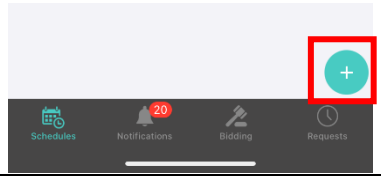
Swipe down on the calendar to expand to month view.
Calendar Icons:

1. Red Dots: a red dot below a number indicates a schedule on those dates
2. Green Circle: the green circle indicates the current date
3. White Ring: when a date is selected, a white ring appears on the date



Scheduling

The plus icon on the bottom right allows you to create a new calendar item.



Select Date: allows you to choose the date you would like to schedule

Select Service: will indicate the services you will be providing

Select item: the action being taken – whether to call a client, schedule a visit, etc. These items change based on the service selected

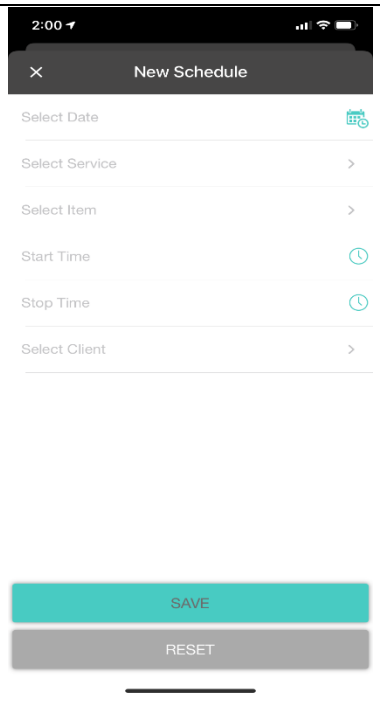
Select the scheduled start and end times

Select client: select the client you will be providing service to

"Save" creates the calendar item, "Reset" discards the information.

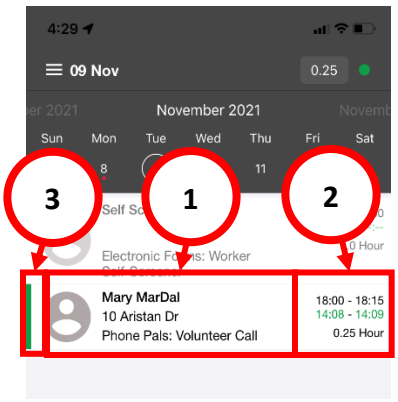
Close the window to see the item you created. If you find that your schedule is not updated for that day, swipe down from the top to refresh schedule data.

Note: You will be able to edit the details entered on this screen after creating the item.



Scheduled Client

1. The client tile contains their name, address, and type of visit.
2. The time on the top right indicates the scheduled time. When a visit has been completed, a second set of times will appear, indicating the actual start and end times captured by the application.
3. To the left of the client tile, colors indicate:
   Green – visit was completed successfully
   Yellow – visit is in process
   Red – visit was declined or did not occur



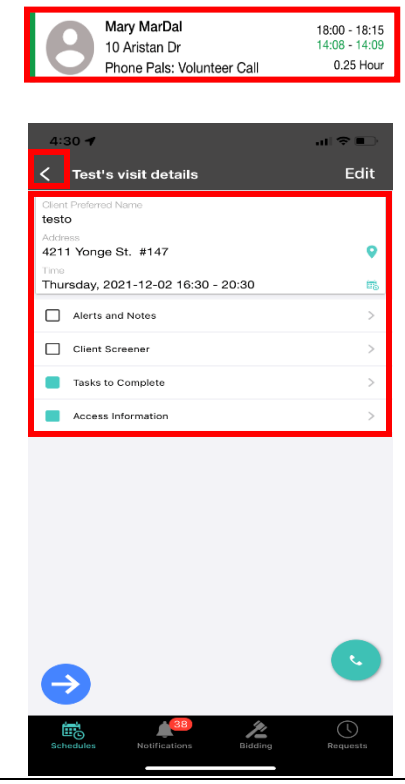
Client Tile Actions

When tapping directly on a client information tile, client details will be provided.

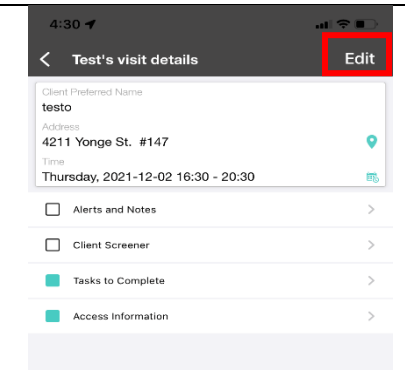
This screen provides you with the client's information including: Address, Phone Number, Visit Date, Visit Time, Alerts and Notes, Tasks required during the visit, and Access Information.

Some of the information will only become available 48 hours prior to the scheduled start time to protect client's privacy.

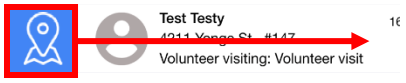
If available, you can tap on the address to open up Apple/Google Maps or tap on the phone icon to call the client. Use the back arrow on the upper left to return to the Schedule Center.



The "Edit" option on this screen allows you to edit the details of the visit. It is only available if the visit hasn't been checked out yet. If available, you will be able to edit all the details before checking in and some of the details including Service, Item, and Stop Time after checking in.

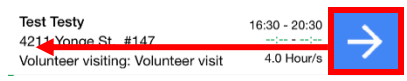


When swiping right on the client's tile, a map icon will appear, allowing you to open Apple/Google Maps to provide you with directions.

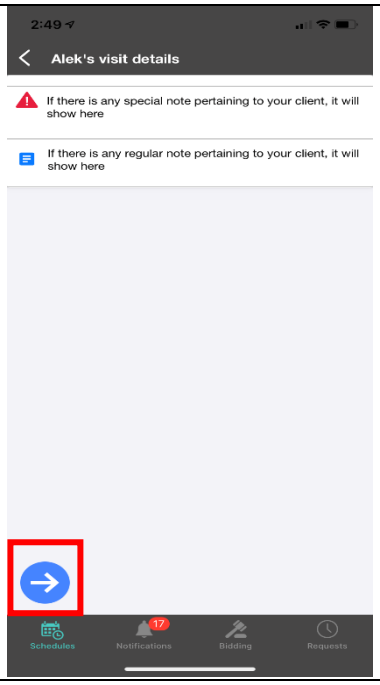


Completing Scheduled Visits

To check in, swipe the client tile to the left and tap on the blue checkmark button.



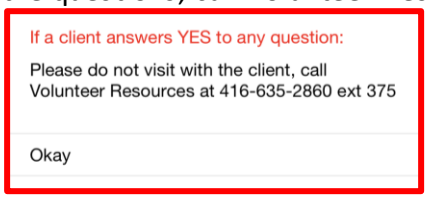
If the client has alerts or notes, the first screen will show you all of the alerts and notes on file. If there is none, this screen will not appear. Tap the blue arrow button to move on.



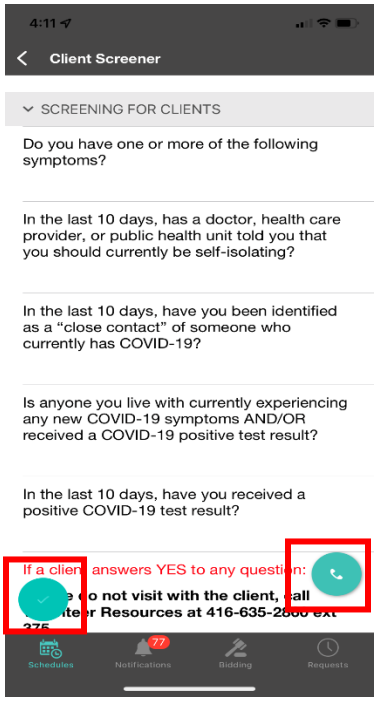
Client Screener

The client screener needs to be completed before every in-person visit. It is not required for scheduled phone calls and any past visits. Before head out to the client's residence, use the green call button on the bottom right to call the client, tap each question and record client's response. Also make sure the client is at home and ready for the visit.

The last tile is a reminder that if the client answered "yes" to any of the questions, call Volunteer Resources and do not visit the client.

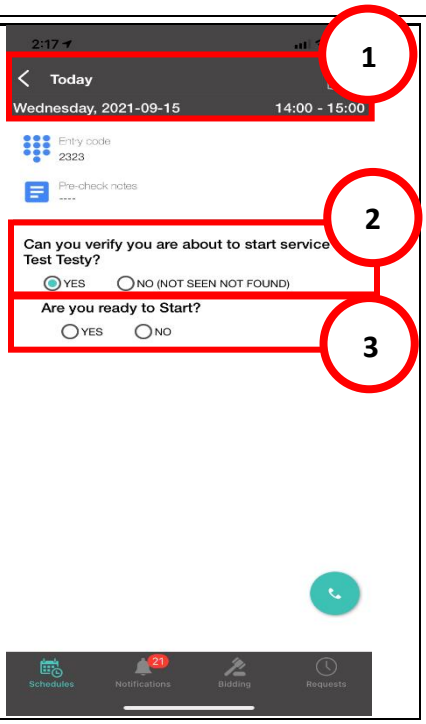


If none of the answers is "yes", tap the green check mark button on the bottom left to complete the screener.



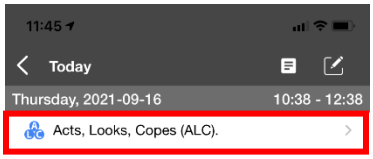
Client Check-In and Verification

1. This screen provides you with the client name, current date, and scheduled visit time
2. Question 1: Can you verify you are about to start service for Select "Yes" – allows you to proceed to the next question
3. Question 2: Are you ready to start
   Select "Yes" – allows you to proceed to the tasks screen

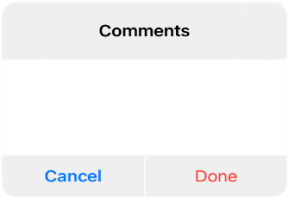


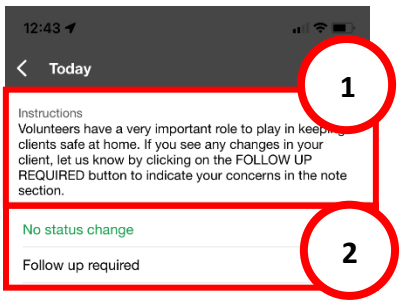
Tasks Screen

The screen will show all of the required tasks for the visit – this will mainly be the ALC Checklist. To complete a task, tap on its name.



1. On the top section, instructions are included surrounding the specific task.
2. The bottom list are the possible responses you can provide. If you choose "Follow up required", a comment screen will allow you to include additional comments.



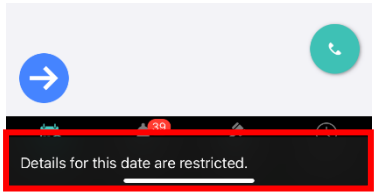


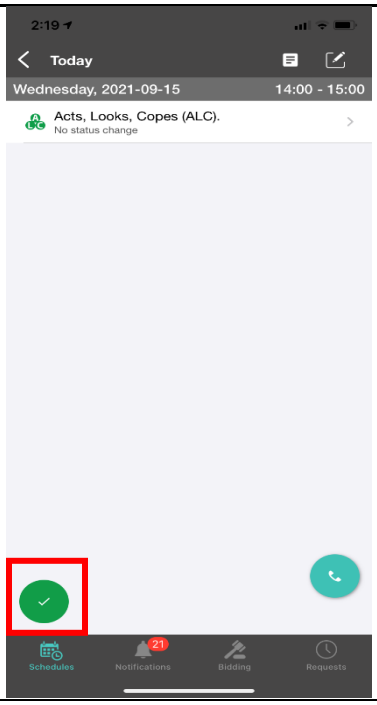
When a task is completed, its icon will change colour.
Blue: the task has not been completed yet
Green: the task was completed successfully without any issue
Red: the task was completed, but there was an issue that Circle of Care will have to review (I.E. "Follow up required" was selected during the ALC checklist task)



Once all tasks have been completed (all icons are red or green), a check mark button will appear on the bottom left allowing you to successfully check out. You will be brought back to the main page after pressing it.

Note: You can create a visit for any past or future days, but can only check in on the day it is scheduled for. Otherwise, a message "Details for this date are restricted" will show.



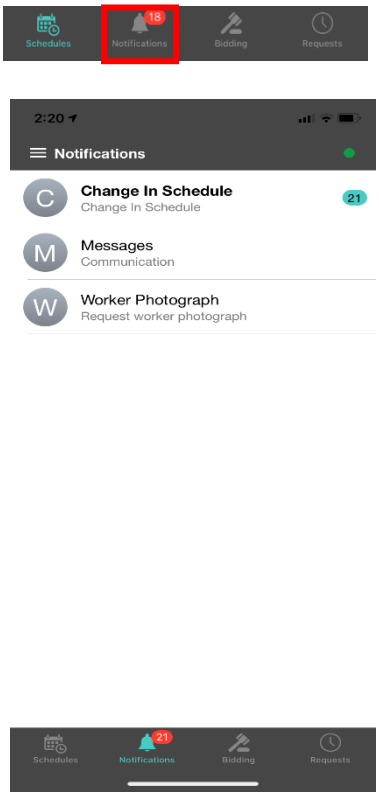


Message Center

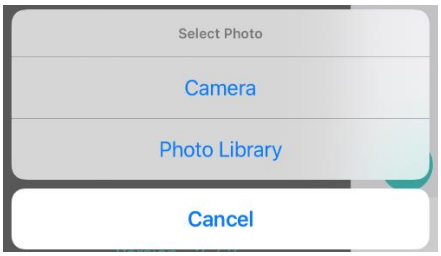
The bell icon opens the Message Center.

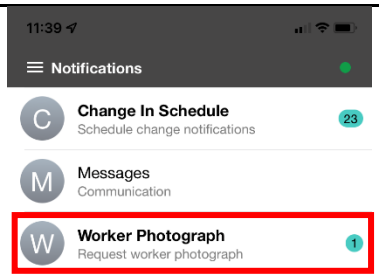
You will be able to see messages from the Circle of Care team. These messages have been organized into different categories. When you have a new message, you will see a red circle with a number in it on the bell icon.

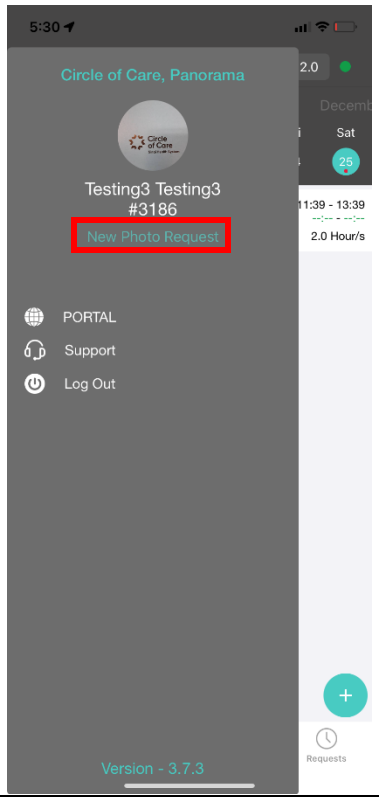
To open messages, tap on the correct category then select the message you would like to view.



Any new photo request messages will go into the “Worker Photograph” category. If you receive a new request, go to main menu and tap on the “New Photo Request” button under your profile picture. In the pop up window, choose “Camera” to take a picture of yourself or choose “Photo Library” to select a picture from your library.







Contact Page

Circle of Care IT Helpdesk

416-635-2860 ext. 433 and 285

Circle of Care Volunteer Resources

Valeria Samsonova (LGT, Grocery Shopping, Russian Phone Pals & Friendly Visitors)
Administrative Assistant
T 416-635-2860 ext. 142 C 647-501-5472

Patricia Flinn (MOW, Phone Pals, Friendly Visiting)
Coordinator, Volunteer Resources
T 416-635-2860 ext. 375 C 416-505-0539

Charlotte Koven (Hospice & Bereavement)
Hospice Case Manager
T 416-635-2860 ext. 271 C 647 534 5886

Lisa Rae
Director of Volunteers, and MOW Services
T 416-635-2860 ext. 284 C 416-843-3762