**Viewpoint Customer Portal Guidance**

<https://rnib-vol.powerappsportals.com/Volunteering/>

## The following guidance applies to the Customer Portal on the RNIB website.

The customer portal in RNIB allows quick access to enquire about services and update your personal information on your RNIB account. As a volunteer this will also give you access to your current volunteering commitments, your essential training status, opportunities to update your availability to volunteer, and it allows you to apply for volunteer roles too.

## Registering for an account

The first step is to register for an account if you do not already have one.

Choose the option to register and this will walk you through the various steps involved. This includes asking for your name, DOB, address, phone number and email address. It will also ask you to input a code in which appears in an image and an audio option to play this code.

Once you have completed this, there will be a confirmation displayed which lets you know it is successfully submitted.

There will then be an email sent to the address you registered with. There will be an Invitation code in this email displayed. Follow the link on this page which says **register** and that will automatically copy the code to the next stage.

The next stage will display the redeeming code at the top. It will also ask for more information which you will need to choose for yourself this will include:

**Email:**

**Username:**

**Password:**

Complete this information and select **register**

This will then bring you to a profile page. On this page there will be links displayed to the various areas of your personal and volunteering information. These can be selected and updated at your own discretion. To find more information on each see below:

#### Contact Details

Includes the option to change your contact details such as email, phone number, address. To update any of these just type in the appropriate field and select **Submit** at the end of the page.

#### Communication Preferences

This will ask for your preferred methods of contact, select each field to choose from the drop-down lists. There is also a box where you can type any specific notes about your Training Format preferences. To complete your preference field use the **Submit** button at the end of the page.

#### My Referees

This page will show the details of referees who you have included when submitting any previous volunteering applications.

If you have a new application which required you to upload any new referees the Create button allows for this. It will then ask you to input the contact details of the referee and save them to your profile.

Note – this will only need to be done if you are submitting a new application for a different volunteering role and you have been requested to get a new reference for this role. To change information for an existing referee, please contact the Volunteering Team.

#### Diversity Information

This section allows you to update the Diversity information which RNIB holds about you. There are drop down lists to select from. Once you have completed the sections the **Submit** button at the end of the page will update the information.

#### My Status

This allows you to select what your current Volunteer Status is. The options are included in a drop-down list and these are:

#### Available

This means you are available to participate in Volunteering activities.

#### Away

This should be selected if you are going to be away for a period for example on holiday and you will not be available to volunteer. If you select this please remember to return to the Portal once you are ready to participate and update to Available.

#### Busy

This should be selected if you are busy with a volunteering assignment and can’t take on any new ones; again please remember to return to the Portal when ready and update to Available.

#### My Essential Training

This will include information about the Essential Training process in RNIB for relevant volunteering roles. The information displayed will let you know the requirements and how to complete these.

The record which is displayed at the bottom of the page will tell you information about your individual training record and what the current status of your training is, for example if it needs to be renewed.

#### Security

This section will have links to let you change your password and email, complete the fields required when needed and use the “**change and confirm”** button to submit.

#### Your Information

This section displays the details RNIB holds, including your name, email address, title, preferred language, and contact number. To update any of the fields, type in the relevant box and use the **Update** button at the end of the page to confirm the changes.

Your **Organization**, **Nickname, Website and Public Profile Copy** are optional. They will be displayed with your comments and forum posts if you post on the main RNIB website (this is separate to the volunteering section).

There may be a notification to confirm your email tap on the button with the mail icon to do this.

There will also be a section which asks you to select how RNIB contacts you, this includes

**Email**

**Fax**

**Phone**

**Mail**

Select the relevant options and choose **Update** to complete.

## Logging in

When logging into the system with your username and password it will bring you to the home page. Whenever you log in for the first time to complete registration there will be a box which asks you to confirm your email.

The main page offers various ways to engage with RNIB. There will be a link titled Volunteering for RNIB, which should be selected to be taken to the Volunteering page.

**To make an Application**

Once on the volunteering page, you will be presented with a list of our current volunteering opportunities. Here you can browse through these or use the filters on the left-hand side of the screen to select the following:

Opportunity Type

Region

Homebased Opportunity

Opportunities Reserved for Blind and Partially Sighted people

To filter by any of these just select the one(s) you wish to search by.

To see more about any of the opportunities, select the Opportunity Number to see the details. To apply for the opportunity, select the **Apply** button at the bottom of the page. Some quick opportunities do not need an application. These will have information on how to volunteer in the **How to get involved** section of the opportunity details.

The Apply button will take you to the application form and allow you to follow the steps through to apply. Complete each of the pages by inputting the requested information and using the **Next** button at the bottom of the page. As you progress through the application the sections which you have completed will be displayed at the top of the screen, these will change to Green with a tick when the information is completed and moved to next stage of the application.

Sections include Volunteer Diversity Details, Referee details, and a Privacy Statement. The Privacy Statement is a drop-down box.

Once you have submitted the application it will then appear in the My Applications section as described above. The Recruiting Manager will then contact you directly about the next stage.

To interact with your Volunteering activities there are menu options on the top right-hand corner of the screen and will include:

### Enquiries

When selecting enquiries this will link to other services in RNIB such as Grants, Customer and ECLO referrals. This is separate to Volunteering and related to any activity as an RNIB customer.

### Volunteering

The options which you will be given are:

#### Volunteering

This will take you back to the Volunteering Opportunities page where you can view and apply for our current volunteering opportunities.

#### My Applications

This will display any existing volunteering applications you have open and the details of that application at the bottom of the page.

There will also be a link which allows you to search and apply for new volunteering opportunities. See the section on **Making an Application** to get more details on how to apply for another role.

The applications will be listed with the following information:

Application

Submitted Date

Opportunity

Recruitment Checks Required

Recruiting Manager

#### My Commitments

This displays your current volunteering commitments

Information which is included is as follows:

Commitment

Opportunity

Start Date

Status Reason

Essential Training Pending

Safeguarding Training Level

Volunteer Manager

This section will allow you to access the information which the Volunteering Team holds around your Commitment: This is not information that you can update – it’s just to view.

On this page there are also links to useful Resources and Guidance as a Volunteer and to Essential Training Requirements.

### Troubleshooting

If you experience difficulties logging into your portal account, it may be because setup isn’t complete.  Check if you have previously received an email with an invitation code.  There will be a link in the email that you will need to click on to finish account setup. This should resolve the issue.

If you have not received an email, please contact the Volunteering Team (details below) and we can resend this. Once you have received the new code from the Volunteering Team via email, you can then click on the link [Redeem invitation · RNIB Customer Portal](https://customerportal.rnib.org.uk/Register?returnUrl=%2FVolunteering%2F) and enter the code into the Invitation Code field. The next step is to make sure to tick the box labelled ‘I have an existing account’ and then select the Register button. This should take you to the Portal Home page or it may first open a page where you can enter more contact details. This will complete your set up.

If issues persist once you have completed these actions then please contact Volunteering@rnib.org.uk or on 0303 123 9999 option 4.

**End Of Document.**