Coordinator Portal
Online Scheduling Guide

Our blood drive management site is called the Coordinator Portal. You can find it at coordinators.vitalant.org. Blood drive coordinators who effectively use this online scheduling system have greater blood drive success. We encourage you to use it for many of your communication and scheduling activities. Thank you for saving lives with Vitalant!

HOW TO LOG IN:

Step 1: Go to ***coordinators.vitalant.org***.

Step 2: Enter your Username: _____

Step 3: Enter your Password.

If you don't know or haven't yet created a password, click on "Problems logging in?" and follow the instructions.

(NOTE: Passwords must be at least 8 characters in length and include upper and lowercase letters, and at least one number and special character. Passwords are case-sensitive.)

TO SCHEDULE A DONOR APPOINTMENT

For all appointments, please search the database FIRST for existing donor records

After you log in, click "Donors" from the top banner. Then click "Search for donors" in the top gray bar to see if the person has an existing record. You may also view the alphabetical list of donors on the "Donors" page to find the person you're seeking.

FOR AN EXISTING DONOR:

Option 1: If the donor appears on your donor list, click on the "Book an Appointment" icon to the right of their name. Choose Donation Type and Available Blood Drives (be sure to choose the correct date if you host multiple drives). Next, follow the steps to set up the date and time for their appointment.

Option 2: If using the "Search for donors" feature, enter first and last name and then click "search." Once the donor profile appears, click the "Book an Appointment" icon and follow the steps to schedule the donor's appointment.

HINTS:

- When searching, first try the donor's legal name, e.g. use "Robert" instead of "Bob."
- If needed, click "Advanced Search for Donors" for additional search criteria.
- It's important to always use existing donor records, if available, to prevent the creation of duplicate accounts.

If you were unable to locate the donor, you can add a new donor by clicking "Create Profile for New Donor" in the top gray bar.

TO ADD A NEW DONOR:

Step 1: Click "Create Profile for New Donor." Use legal name.

Step 2: Enter the required fields to create a new donor profile (first and last name, date of birth, gender, email address and primary phone number).

Step 3: Click "Add" and the donor profile will be created. To find it, scroll through your list of donors or use the search functionality.

Step 4: Click on the "Book an Appointment" icon and follow the steps to schedule the appointment.

DONOR CREATED APPOINTMENTS

Donors can also make their own appointments.

- Donors go to vitalant.org and choose "Donate Now."
- Donors enter your blood drive code: _____
- **For new donors or returning donors who haven't set up their donor account yet:**
  - From the home page, click "Create an Account."
  - Complete all fields and click "Submit."
  - An email from Vitalant will automatically be sent to the donor with a link to click to activate the new account.
  - Donor will be prompted to set up a password.
  - Note: Donors may also schedule an express appointment and bypass creating a donor account. Donors are encouraged to setup their account so they may receive rewards.

EMAILS TO DONORS

There are several email templates available to you in the Coordinator Portal: recruitment, thank you and one you can create with a customized message. For more details about how to generate a list of donors and send one of these emails, please review the Coordinator Portal Guide.

QUESTIONS?

Please contact your Vitalant Account Manager, or use the contact information below:

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