Blood Drive Chairperson Web Scheduler Cheat Sheet

Thank you for helping NY Blood Center and your local hospitals collect the blood that is always in need. The following is a quick reference on how to schedule your group's donors using our donor group scheduling system. Outside of this sheet, there are lots of cool things you can do, enjoy!

SYSTEM ACCESS

1 To access the system go to the following web address using any computer that can access the internet. www.nybloodcenter.org/Chairperson

2 To Login to your system, your account manager will give you the specific username and password for your group.

SCHEDULING PAST DONORS

3 To see a list of your existing donor base (past donors from your group) click on "My Donors" on the top navigation menu.
   a. This shows all the eligible donors listed by First Name; to sort by name or another field click the column header that you'd like to sort by.
   b. To search for a donor (rather than scroll through the list) use the search criteria section at the top.

4 To schedule a donor, click the donor's name.
   a. The next screen shows all available blood drives for your group in the next 30 days. *(to see drives further in the future, contact your account manager)
   b. Select the drive date and location you'd like to schedule this donor for and you'll be prompted to select an available appointment time.

SCHEDULING FIRST TIME DONORS

5 To schedule a donor that is not on this list; click "Add a New Donor" from the home screen.
   a. Enter the donor's first and last name and any other information you currently have about the donor (Donor ID#, Phone #, Birthdate) to help NYBC properly identify the donor and click "Schedule"
   b. Follow steps A-B from #4 above to schedule the donor at your drive.

RESCHEDULING EXISTING APPOINTMENTS

6 To Reschedule an appointment, click "Appt Manager" from the top menu bar.
   a. Click and drag the appointment you'd like to change and release it when you reach the new desired slot.
   b. Hover over any slot to see the details of the appointment.

REPORTS

7 To run a report, click on "Reports" from the left hand menu.
   a. Click on "Appointment Report" to see a list of donors who have signed up for your blood drive.
      i. Remember, donors may sign up themselves on the internet or via telemarketing so it is important to check this schedule for all appointments.
   b. Click on "Donation Frequency" to see your past donors and how often they donated.
   c. Click on "Drive Results by Date Range" to see how many donors donated at a past drive.