

2025 Volunteers Dashboard - How-To Guide

After a decade of using forms to collect the certification visit data, we're finally at a point where entering the data directly into the database would streamline and improve the process. The database is desktop and mobile-compatible. Please don't hesitate to contact me with any questions or feedback about this guide or the process in general.

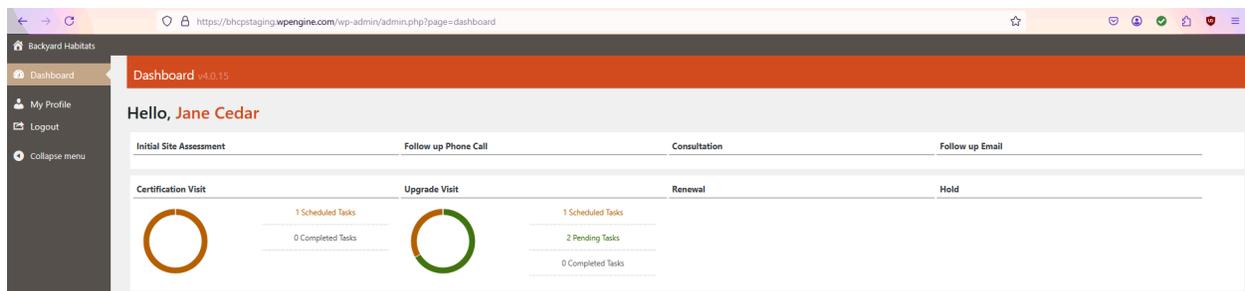
For a video version of this written guide, please visit [this link](#).

Login

1. Website: <https://backyardhabitats.org/wp-login.php>
2. Enter the username and password we provided each volunteer individually via email.
3. Once logged in, please change your password to something safer by clicking the 'Account' button in the top right corner.

First Screen

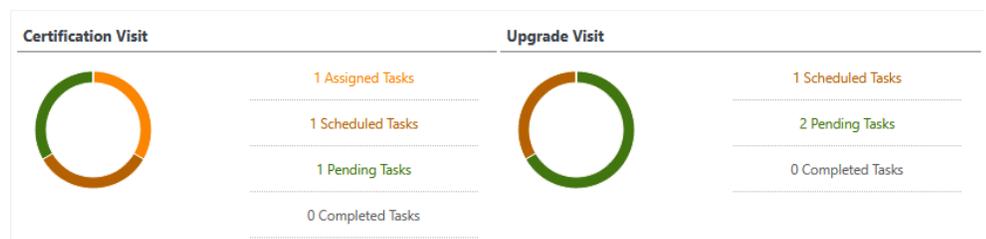
Once logged in, you will see your dashboard with your assignments and their progress.



Tasks

The dashboard is organized by tasks:

- Initial Site Visit
- Follow-Up Phone Call
- Consultation
- Follow-Up Email
- **Certification Visit**
- **Upgrade Visit**
- Renewal
- Hold



* Volunteers only see Certification Visit and Upgrade Visit tasks on your dashboards.

Each task is broken down into three steps and one substep.

- **Assigned**: New tasks assigned to you.
 - **Scheduled**: Tasks for which you scheduled visits.
- **Pending**: Tasks that you completed and are waiting for administrators' approval.

- **Completed:** Tasks that were approved by administrators.

* The ring charts visually represent the tasks and the step count for the assignments within each task.

Process

Scheduling

The initial part of the process stays the same until the part when I connect you and the participant via email. Instead of sending you the property information in a Site Report file attached to the email, the email is your cue to log into the database to see the assignment in your dashboard.

Dashboard v4.0.15

Hello, **Jane Cedar**

Initial Site Assessment	Follow up Phone Call
<p>Certification Visit</p> <p>1 Assigned Tasks</p> <p>1 Scheduled Tasks</p> <p>1 Pending Tasks</p> <p>0 Completed Tasks</p>	<p>Upgrade Visit</p> <p>1 Scheduled Tasks</p> <p>2 Pending Tasks</p> <p>0 Completed Tasks</p>

Profiles

Profiles	Actions
<p>Portland, OR 97215</p> <p>Karoline (Primary) @gmail.com</p> <p>Frank (Secondary) 2f316264ff065f157624711403@noreply.invalid</p>	<p>Certification Visit</p> <p>★ Assigned (Assigned: May 30, 2024)</p> <p>📅 Visit scheduled for January 23, 2025</p> <p>👤 Certified</p> <p>📎 Site Report (System)</p> <p>📎 Site Report (Malcolm McDowell)</p>
<p>Portland, OR 97239</p> <p>John Brian (Primary), He / him English @gmail.com</p> <p>Maryanna (Secondary), @gmail.com</p>	<p>Certification Visit</p> <p>★ Assigned (Assigned: February 5, 2025)</p> <p>👤 In Progress</p> <p>📎 Site Report (Catherine Trzybinski)</p>

1. The properties I assign to you will show in the '**Assigned Tasks**' list (orange line).
 - a. Click the orange line to open a slide-up window.
 - i. This window displays all the necessary information (contact information, pronouns, preferred language, address, site report, etc.).

- b. Review the information on the **Site Report** by clicking on the hyperlink (blue words).
 - i. The Site Report document will open in a new window. After you review it, you can close it.
- c. Contact the participant via email to schedule a visit (same as always).

2. When you have a date scheduled for the visit
 - a. Click that property's **'Certification Visit'** hyperlink (horizontal red arrow).
 - b. On the slide-left window, enter the visit date (red circle).
 - c. Click the **'Save Draft'** button (vertical red arrow). The window will say **'updated,'** and you can **close it**.

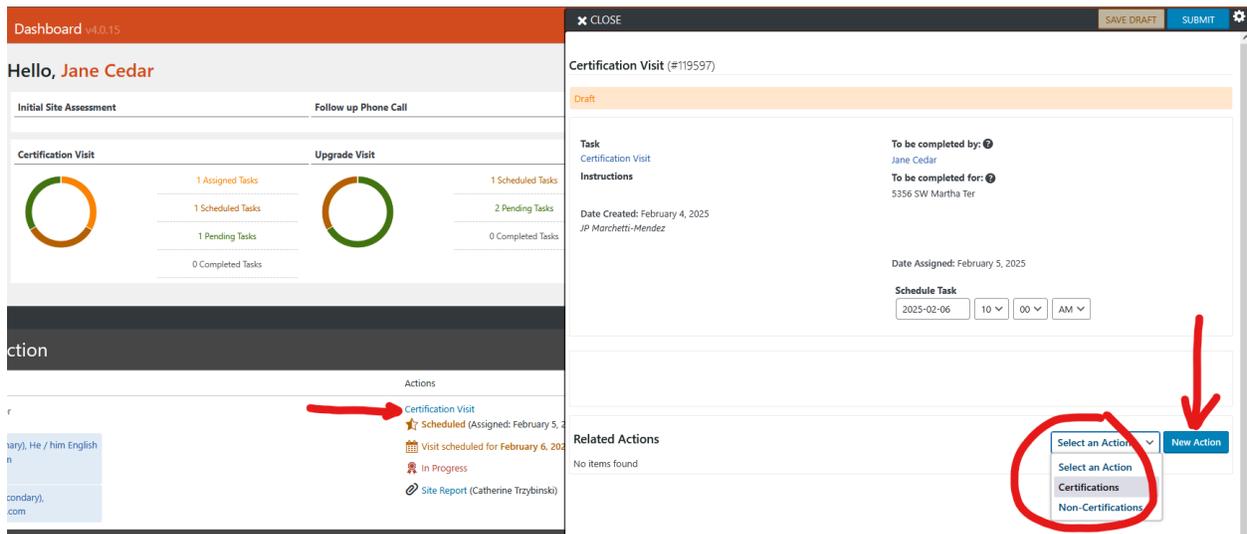
IMPORTANT: Clicking the 'Submit' button prematurely finishes the task. Only click the 'Submit' button when ready to send the task for the administrators' review.

- d. **Refresh** your browser (F5 key) to see the updated dashboard.

NOTE: Under the instructions (highlighted yellow), we'll add any special considerations the participant included when filling out the visit request form. In other words, I'll transpose the content of cells in column D of the self-assignment spreadsheet.

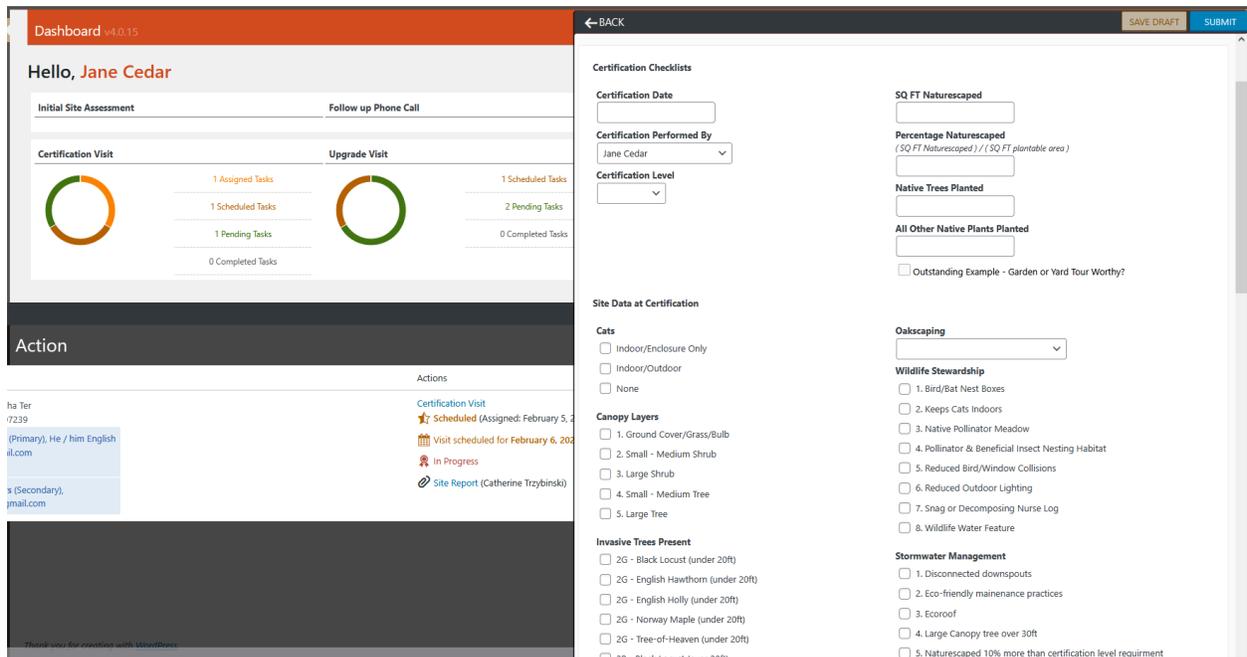
Post Site Visit

After the site visit, return to your dashboard and find the property you just visited.



1. Click on the “Scheduled Tasks” (brown) line.
2. Click on the **Certification Visit** task in the slide-up’s middle column.
3. Click on the **Action selector** (red circle) and select the form you want to create.
 - If the visit resulted in a certification, choose **Certification**
 - If the visit turned out to be a consultation, choose **Non-Certification**.
4. Click the **New Action** button (red down arrow). The form type you selected opens.

Submitting Certification and Non-Certification Forms



5. Enter the data you collected during the site visit in the opened form.
 - The form is similar to the one we’ve been using.
6. Upload the picture(s) you took of the participant toward the bottom of the form.
7. Write the Facebook post following the example provided toward the bottom of the form.

NOTE: If the participant refuses to be included in our social media, check the checkbox and skip steps 6 and 7 above.

- Click the Submit (the form is finished) or the Save Draft (the form is partially filled) button.

NOTE: Drafts will be saved indefinitely, but you will receive automatic reminders about unfinished forms after 14 days.

- Back out of the acknowledgment window (top left corner).

Dashboard v4.0.15

Hello, Jane Cedar

Initial Site Assessment Follow up Phone Call

Certification Visit Upgrade Visit

1 Assigned Tasks 1 Scheduled Tasks 1 Scheduled Tasks

1 Scheduled Tasks 2 Pending Tasks

1 Pending Tasks 0 Completed Tasks

0 Completed Tasks

ction

Actions

- Certification Visit
- Scheduled (Assigned: February 5, 2025)
- Visit scheduled for February 6, 2025
- In Progress
- Site Report (Catherine Trzybinski)

Certification Visit (#119597)

Draft

Task Certification Visit

To be completed by: Jane Cedar

Instructions

To be completed for: 5356 SW Martha Ter

Date Created: February 6, 2025 JP Marchetti-Mendez

Date Assigned: February 5, 2025

Schedule Task

2025-02-06 10 00 AM

Related Actions

- Draft February 6, 2025 5:10 pm

Select an Action New Action

- Click the **Save Draft** button if you saved a draft of the form (example above), or click the **Submit** button if you submitted a complete form (example below).

Dashboard v4.0.15

Hello, Jane Cedar

Initial Site Assessment Follow up Phone Call

Certification Visit Upgrade Visit

1 Assigned Tasks 1 Scheduled Tasks 1 Scheduled Tasks

1 Scheduled Tasks 2 Pending Tasks

1 Pending Tasks 0 Completed Tasks

0 Completed Tasks

ction

Actions

- Certification Visit
- Scheduled (Assigned: February 5, 2025)
- Visit scheduled for February 6, 2025
- In Progress
- Site Report (Catherine Trzybinski)

Certification Visit (#119597)

Gold

Task Certification Visit

To be completed by: Jane Cedar

Instructions

To be completed for: 5356 SW Martha Ter

Date Created: February 6, 2025 JP Marchetti-Mendez

Date Assigned: February 5, 2025

Schedule Task

2025-02-06 10 00 AM

Related Actions

- Completed February 6, 2025 5:20 pm

Select an Action New Action

- Close the acknowledgment window.
- Refresh the window (F5 key) to see the updated dashboard.
- The task now shows as Pending, which means an administrator will review and approve it.

Dashboard v4.0.15

Hello, Jane Cedar

Initial Site Assessment Follow up Phone Call

Certification Visit Upgrade Visit

1 Assigned Tasks 1 Scheduled Tasks

2 Pending Tasks 2 Pending Tasks

0 Completed Tasks 0 Completed Tasks

Actions

Certification Visit

★ Pending (Assigned: February 5, 2025)

👤 Certified

Certification Visit

★ Pending (Assigned: February 5, 2025)

👤 Certified

📄 Site Report (Catherine Trzybinski)

Certification Visit (#119597)

Pending

Task: Certification Visit

To be completed by: Jane Cedar

Instructions: To be completed for: 5356 SW Martha Ter

Date Created: February 6, 2025
JP Marchetti-Mendez

Date Assigned: February 5, 2025

Schedule Task: February 6, 2025

Related Actions

Completed February 6, 2025 5:20 pm Gold Certification

NOTE: While the task is pending, you can still visit and make changes to the form you submitted.