The Liaison Portal makes it convenient for Liaisons to schedule appointments for Group Blood Drives. To learn more, please refer to this Guide!
# Contents

1. Introduction to the Liaison Portal ................................................................. 3
2. Accessing the Liaison Portal ............................................................................ 4
3. Liaison Portal Capabilities .................................................................................. 5
   3.1 Viewing Blood Drives .................................................................................... 6
   3.2 Reviewing the Progress of a Drive ............................................................... 7
      3.2.1 Schedule Frame ..................................................................................... 7
      3.2.2 Upcoming Drive Frame .......................................................................... 8
      3.2.3 Past Blood Drive Frame ......................................................................... 9
      3.2.4 Recruiter Information Frame .................................................................. 9
   3.3 List of Donors .................................................................................................. 11
   3.4 Scheduling an Appointment ......................................................................... 12
   3.5 Scheduling an Appointment for a new donor/member .................................. 14
   3.6 Modify an Existing Appointment .................................................................. 15
   3.7 Communicating with Members/Donors ......................................................... 19
   3.8 Sharing Drive Information to Social Media Sites ......................................... 21
   3.9 Reports .......................................................................................................... 22
   3.10 Change Password ......................................................................................... 24
4. System Administrators ....................................................................................... 25
5. Summary ............................................................................................................ 25
1. Introduction to the Liaison Portal

In a great many cases the organization (a.k.a. Donation Group) that the Blood Center is working with to set up a local blood drive assigns a chairperson or a Liaison to represent them and help coordinate and manage their blood drive. These liaisons are extremely important and useful members of the blood drive team and can significantly impact the success of the drive by actively participating in the donor recruitment process. The DRM Touch Liaison Portal was designed specifically to give these liaisons the tools they need to actively manage and support a blood drive and this manual is dedicated to discussing the steps that should be taken to properly set up the liaisons.

As noted, the DRM Touch system features an optional Liaison Portal to make it convenient for liaisons to schedule appointments for Group Blood Drives. This Liaison Portal will feature a URL which is unique to each respective Blood Center. When accessing the Liaison Portal, the liaison will be greeted by a branded home page similar to the following screen. Note: Once the portal is properly configured your Blood Center’s logo should be displayed in the upper left hand corner instead of MyBloodDrive.

![Login Page Example](image)

**NOTE:** The Blood Center Coordinator or Recruiter is usually an employee of the Blood Center, while a liaison works on behalf of a specific donation group, or donation groups. Although sometimes this individual is one and the same.

The Liaison Portal features a number of features for Liaisons, including the ability to schedule appointments at multiple mobile blood drive locations. However, it is important to bear in mind that these mobile drives must be: of “Confirmed” status AND associated with the liaison’s organization in order to appear in the Liaison Portal.
2. Accessing the Liaison Portal

The Liaison Portal will be accessed utilizing the unique URL along with user name and password provided to you by the Blood Center Coordinator.

**NOTE:** The Blood Center Coordinator will establish your Login ID and password using the **Liaison** option of the **Admin** section of the main menu within the **DRM Touch** system. This is also known as configuring user access management.

Once successfully logged into the portal you will see a home page similar to the example shown below.

![Home Page Example](image)

Please be advised that in most cases, liaisons will not have access to this administrative functionality. To learn more about adding new Liaisons or modifying information about existing Liaisons please refer to the **Admin Manager Users Guide** under section **Liaisons**.
3. Liaison Portal Capabilities

The Liaison Portal makes it very simple to communicate with donor/members associated with blood drives, schedule appointments for these donors, see the current status of the drive(s), run reports on appointments or results and change your password.

Once you have access to the Liaison Portal and your Blood Center Coordinator has attached or assigned donation groups to the liaison user id, you may view and maintain a variety of information about drives and donor/members associated with the groups you can see.

**NOTE:** The Blood Center Coordinator must add any groups which the liaison is affiliated with prior to scheduling appointments in the Liaison Portal. For more information, please refer to [Administrative Manager User Guide](#).

To access the Appointment Manager screen, click on the Manage Appointment link or App Manager tab as seen below.

![Liaison Portal Menu Example](image)

The Liaison Portal Home page displays a variety of activities which can be performed after access to the Liaison Portal is obtained.
3.1 Viewing Blood Drives

Select the Blood Drives tab (or the View all past and present blood drives link) to see a list of all the blood drives (past and future).

List of Drives Example:

Screen Options:

- View all current or future drives (Upcoming Blood Drives section)
- View all past drives for your enterprise (Past Blood Drives section)
- Request a new drive (Request a Drive button)
- View appointments currently set for an Upcoming Blood Drive (click on number under Appts column heading)
- View available appointment slots for an Upcoming Blood Drive (click on number under Slots Avail column heading)
- Identify if an Upcoming Blood Drive is ahead or behind goal by viewing the color of the number under the Goal column heading (Red indicates behind goal, green ahead of goal)
- View a list of all kept appointments (actual donations) for a Past Blood Drive (click on number under the Donations column heading)
- View a list of all scheduled appointments for a Past Blood Drive (click on number under Appts column heading)
- Identify if a Past Blood Drive met or fell short of its goal by viewing the color of the number under the Goal column heading (Red indicates behind goal, green ahead of goal)
3.2 Reviewing the Progress of a Drive

The liaison you will be interested in knowing how successful the donor recruitment process is progressing for a drive and if drive goals are being met. Select the Dashboard tab or the View drive goals link on the home page and the system will present a single page with full details about the current status of the drive.

Dashboard Example:

**NOTE:** The Dashboard display is configurable by how the user chooses to most effectively utilize the screen. By clicking and dragging a frame the user may move the most frequently used section to the top frames of the screen. The Blood Drive Coordinator will determine the initial view of the screen.

3.2.1 Schedule Frame

This frame presents a donor search screen used to locate specific donors associated with a group by entering information into the available search fields and selecting the Search button. When the search is complete the list of donors matching the criteria will be presented on the My Donors page as in the following example. By selecting any listed donor a quick schedule screen that allows you to select a time slot for the donation appointment will display. Refer to the section “Scheduling an Appointment” for the complete scheduling process.
3. Liaison Portal Capabilities

3.2.2 Upcoming Drive Frame

This frame displays a summary of any drive by selecting the drive name in the Change Drive drop down box. Once selected, the system displays the latest updates for goal, total appointments made to-date (Appts) and remaining available appointment slots (Slots).

Selecting the Appts value will automatically run a report listing all the donors who have made appointments.

By select the Slots value, the system will be redirected to the App Manager (tab) for viewing available time slots.

Selecting the Interstate sign symbol opens a Google Map for directions to a donation site.

Specifics about any drive from this frame can be shared by selecting the Share link which brings up the standard share facilities as shown in the example and allows for selection of other applications. By selecting the application or community, the information can be shared.
3. Liaison Portal Capabilities

Share Example:

For instance, if you have a Facebook account, selecting the Facebook Share link would send the information about the selected drive to your Facebook account (you may have to log into Facebook) and you could post a message about this drive to your friends.

3.2.3 Past Blood Drive Frame

This frame displays a summary of past blood drives associated with your group(s).

The View Full Report button generates a report for the listed Blood Drive and selecting the View All Blood Drives button will move the view to the Blood Drive tab as detailed in Section 3.1.

3.2.4 Recruiter Information Frame

This frame displays the Blood Center Coordinator (aka Recruiter) and their contact information. The Send an Email button opens a blank email template allowing the user to generate a personalized email as seen in the next example. Selecting the Submit Request will send the email to the Coordinator at the address listed within the contact information.
Recruiter Email Example:

The **Request A Drive** button generates a blank email template from which a date for a drive can be entered or selected by clicking the calendar. The comment section is free form and can be used to recommend another drive as shown in the next example. Selecting the **Submit Request** button will send the email to the coordinator.

Request a Drive Example:
3.3 List of Donors

Select the **My Donors** tab (or the **Search for a blood donor** link) to display a list of all the donors associated with your blood drive.

**List of Donors Example:**

This screen allows you to:

- Search for specific donors (entering values or partial values in the search fields and then selecting the **Search** button)
- Limit the donor search to a specific Group (see Group drop down box) or All Donors (if you have been granted permission to do so by your System Admin)
- Sort the list of donors returned from a search request in any order (click on the column heading you wish to sort by)
- Delete or remove donors from this group (if you have been granted permission to do so by your System Admin)
- Immediately see if a donor has an upcoming appointment scheduled (view the App Date column)
- Schedule a donation appointment for any donor on the list by clicking on their name.

If you have been granted permission to remove donors from your group you will see a small ✗ in front of each donor in the group. If you select this ✗ the system will first ask you if you are sure you want to remove the donor and if you say yes, the donor will be removed from the group.
3.4 Scheduling an Appointment

The Liaison will work with a Blood Drive Coordinator or Recruiter to set up and manage drives at the center. Select the App Manager tab (or the Manage appointments link) to begin scheduling an appointment. Once selected, the scheduling page will display as shown in the following example.

Appointment Manager Example:

If applicable, select the appropriate Blood Drive from the drop down menu. Identify an available time slot (gray icon), double click the icon and the Donor Search window will display. Enter available donor information and select the Search button. Donors meeting entered criteria will display.

Donor Search Example:
Choose the desired donor and the appointment detail window will display, allowing you to specify the details of the appointment.

Appointment Reminder Example:

- **Phone Reminder**
  - Check this box for the donor to receive a phone call reminder of their appointment. If checked, enter the phone number for the donor.

- **Confirmation Email**
  - Selecting this check box indicates this donor will receive an electronic mail message to confirm their appointment. Once checked, enter the email address where the confirmation or reminder message can be sent to the donor.

- **Reminder Email**
  - Check this box for the donor to receive an electronic mail message to remind them of their appointment prior to the appointment date. The system will use the same email address listed for a Confirmation email.

- **Post Card**
  - Selecting this check box indicates this donor will receive a post card to remind them of their appointment date.

- **Comments**
  - Enter a message or comment that is to appear on the postcard scheduled to be sent.

After selecting the appointment detail information, select the **Book Appointment** button and the system will schedule the appointment and return to the schedule page. The icon will now be red, verifying that the appointment was made.
3.5 Scheduling an Appointment for a new donor/member

As described in Section 3.4 Scheduling an Appointment, select the **App Manager** tab (or the **Manage appointments** link). If applicable, select the appropriate Blood Drive from the drop down menu. Identify an available time slot (gray icon), double click the icon and the Donor Search window will display. To add an appointment for a new donor, select the **First Time Donor** button located at the bottom center of the screen.

A blank registration form for the new donor information will display.

![New Donor Registration Form Example](image)

New Donor Registration Example:

Enter the available information for the new donor. Required fields for saving the record are the **First Name, Last Name** and **Date of Birth**. Click the **Continue** button and the entered information will be saved and the appointment detail screen will display, allowing the selection of appointment reminder options as described in the previous section.
3.6 Modify an Existing Appointment

Selecting the **App Manager** tab (or the **Manage appointments** link) allows you to view each Drive (by selecting the appropriate Drive within the drop down if applicable) and modify an existing appointment for one of your donor/members.

Appointment Screen Example:

Rolling the mouse over each booked appointment (red icons) will display a detail window to the right of the screen for a review of the donor information.

Detail Window Example:

In order to change the appointment time you can right click on the icon (donor appointment) you wish to modify and drag it to the available time slot (gray icon) the donor would prefer.
To change any of the detail appointment information, (reminder phone number or email address etc.) click on the appointment icon and the detail window will appear for this appointment and necessary modifications can be made. Select Save and the system will return to the appointment screen.

Modify Appointment Screen Example:

Selecting the **Cancel Appointment** button will remove the donor from the schedule and return the screen to the appointment view.

Using the **Reschedule** button enables the movement of the appointment to a different time slot, displaying the scheduling screen.
3. Liaison Portal Capabilities

Scheduling Screen Example:

Click on an open slot and the appointment detail window will display.

Appointment Detail Example:

Complete the information and select the Book Appointment button. The appointment has now been rescheduled.

Selecting the Detailed View button on the upper right of the screen will also display the version of the schedule showing each donor and the time slot information.
By selecting the **M** or **Modify** icon for the appointment of interest the appointment detail window seen below will be presented from which you can make the needed changes.

The appointment can also be rescheduled from here by selecting the **R** or **Reschedule** icon. If you elect to reschedule from this window the system will return to the detail schedule view where you must click on an open slot icon (the Plus sign) and the appointment detail window will display. Changes can be made and selecting the **Book Appointment** button completes the reschedule.

Select the **Save** button to retain any detail information changed in these screens.
3.7 Communicating with Members/Donors

To regularly communicate with the members associated with your drive, select the **Email Donors** tab (or the **Email my donors** link on the home page). Information regarding previous emails sent will be listed directly under the Donation Drive drop down.

To create an email, begin by selecting a **Donation Drive** from the drop down menu (if appropriate).

Templates will be unique to each blood center and typically created by the System Administrator in conjunction with the Marketing Department. To change the template, select from the drop down listing and the display will update. Messages can be created without using one of the provided templates.

![Email Donors Tab Example](image.png)

Member Email Template Example:
Enter the subject line would be for the email and what return email address which will be displayed in the From Email Address on the receivers message. Complete the body of the message with your greeting or communication.

To determine which members will receive the email select the Advanced link and the following selections will display with a number of ways to establish the distribution criteria.

Advance Member Email Filter Example:

Utilizing the various check boxes and the Appointment Status drop down fields enable a user to target specific groups of donors for specific email messages.

**Note:** For instances where you would want to include ALL DONORS, selecting all boxes and an Appointment Status of No Filter would include all donors in the time frame specified.

When creating the body of the email a number of text formatting controls are available within the tool bar.

In addition, the Token drop down is available for you to insert variable information from within the database such as Driving Directions or Drive Appointment Times as needed to complete and customize the message.

Display of the message is available in one of three modes: Design, HTML or Preview as seen in the menu bar at the bottom of the screen. Default mode will be Design and selecting the other modes will change the view.
After final compilation and review select the **Send Emails** button at the bottom of the page and the system will submit the request to the email processing engine. Emails are not directly sent but are placed in a queue to be sent by the DRM Touch Email Engine during its next cycle. Typically the emails will be sent within 10-15 minutes. The progress of the email can be tracked by selecting the **Check Status** link.

### 3.8 Sharing Drive Information to Social Media Sites

Another method to share information about your drive is utilizing various social media sites such as Facebook, LinkedIn, Google, 4GN, etc. This is accomplished in two ways. One method was discussed in Section 3.2 Reviewing the Progress of a Drive. Or, by selecting the **Share blood drive with friends** link on the home page.

Social Site information will display where you can begin to share the specifics about any drive via the standard share sites. Utilize the scroll bar to view all available sites. As a reminder, most sites may require a log on to an account before sharing will be allowed.

**Sharing Sites Screens Example**
3.9 Reports

Select the Reports tab or Get Reports from the Homepage. Rolling the mouse over the report types provides a brief description of each report.

Available Liaison Reports:

**Note:** If appropriate, select a drive from the Drive dropdown field then select the View Report button to display the report.

The Appointment Report lists all donors who scheduled an appointment for a selected drive.

Appointment Report Example:

Utilizing the Select a format drop down then selecting the Export icon allows customization of where to export the reports. Several other options are available in the tool bar as shown here.

The Recognition Report lists all donors who have completed a donation for the selected drive.
Recognition Report Example:

Notice the same command bar discussed above is available to manage the report.

The Recruitment Report lists all donors who meet the selected eligibility criteria. Drop downs are listed for available Groups (if appropriate) and Phlebotomy Type (donation type). Make the selections from the drop down list(s) and select the View Report button. Selected criteria will display.

Recruitment Report Example:

Notice the same command bar discussed above is available to manage the report.
3.10 Change Password

Selecting the **Change Password** tab will display the fields to change the current password.

![Change Password Form]

Change Password Example:

Enter the **Current Password** and select the **New Password** and then re-enter the desired new password in the **Confirm Password** field then select the **Submit** button.
4. System Administrators

For a liaison to have access to all the functionality described in this user guide, the System Administrator or the Blood Center Coordinator must first register the liaison in the Liaison Portal. This can only be accomplished by individuals who have the appropriate privileges in the Core DRM Touch application.

The steps required to properly register and establish new liaisons are completely outlined in the DRM Touch Admin Manager User Guide so please refer to this document for further information about setting up the Liaison Portal and granting login permission to new liaisons.

5. Summary

The DRM system will feature an optional Liaison Portal to make it convenient for Liaisons to schedule appointments for Group Blood Drives. This Liaison Portal will feature a URL which is unique to each respective Blood Center, and user access management must be configured by the Blood Center Coordinator to facilitate use.

The Liaison Portal features a number of features for Liaisons, including the ability to schedule appointments at multiple mobile blood drive locations. The Portal also offers reporting capabilities and the ability to send targeted email messages promoting Group Blood Drives to its member list.

All of these features contribute to the overall success of a Blood Drives hosted by various donation groups.