



The Box / CSXU Field Guide

POINT Volunteer Management System

Policies & Procedures for Resource Coordinators





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POINT





Eleven Steps. That's All It Takes.

The **POINT** platform is how CityServeX tracks volunteer service. As a **Resource Coordinator (RC)**, you don't manage it — you use it. Your job is to get your account and sign up for shifts. POINT will automatically check you in when you arrive and log your hours.

This document follows the official **CSXU Resource Coordinator Field Guide** — the same 11 steps and PDFs published at cityservex.org/resource-coordinator. Each step is described in full here so you have everything in one place.

Your single rule: if something goes wrong in POINT, contact your **Care Champion (Site Leader)**, not POINT support directly. They are your first line of help for everything in this system.





Step 1: Claim Your POINT Account

Policy: No Resource Coordinator may serve in a CityServeX shift without a completed, active POINT account. Your account is created through the invitation email —do not skip this step.

- Flow once a volunteer gets their invite and accepts:
 1. Create the account or sign in if they have an account
 2. Once created, it takes you to the application
 3. Don't forget to verify your account
- Check your email for an invitation from POINT (sender: noreply@pointapp.org). By the time the account is created, they should have gotten an email to verify their account. I would have them verify once the application is done so that they aren't steered away from the application as we are trying to follow the automated workflow.
- Open the message and click **Accept Invitation in POINT, then complete an application. Complete the application before you update your profile.**
- After submitting, return to your email to verify your account. POINT sends a separate verification message for security.
- While you are awaiting your application to be approved by your Care Champion, go back to your profile and update any necessary profile information. You will be taken to a setup page. Create a password and complete your profile information.

If you don't see the invitation email:

- Check your spam or junk folder.
- Search for POINT or noreply@pointapp.org.
- Contact your Care Champion (Site Leader) and ask them to resend the invitation.

This is Step 1 for a reason: Everything else in this guide — your application, your shifts, your hours — flows from having a claimed POINT account. Do not try to move to Step 2 until your email is verified and your account is active.





Step 2: Update Your Profile

Policy: Your POINT profile must be kept accurate and current at all times. **It is best to update your Profile AFTER you complete your POINT application.** Your Care Champion uses this information to communicate with you, schedule shifts, and maintain volunteer records.

How to Update Your Profile:

- Click your **profile icon** (top left of the screen).
- Click Edit and update the following as needed:
 - **Contact information** (name, phone, address)
 - **Email address**
 - **Email and texting settings** (choose how POINT contacts you)
 - **Emergency contact**
 - **Notification preferences**
- Click Save.

Update Your Profile When:

- Your phone number or email address changes.
- Your availability changes significantly (new schedule, extended absence).
- You have a name or address change that affects how CityServeX reaches you.
- Your background check is approaching renewal (your CC will alert you, but proactive is better).

Need help? If you have trouble with your account at any point during onboarding, contact your CityServeX Site Leader (Care Champion). Do not contact POINT support directly.





Step 3: Complete Your Volunteer Application

Policy: Your volunteer application must be completed and approved by your Care Champion before you can register for any Resource Coordination shift. Applications with incomplete responses will not be advanced.

- After verifying your email (Step 1), you will be redirected to the volunteer application automatically.
- Complete all questions thoroughly and honestly. Your Care Champion reads every response.
- Acknowledge all required documents when prompted: **Confidentiality Form** and **RC Job Description**. Read both before acknowledging.
- Submit your application. You will receive an automated confirmation from POINT.
- **Let's Talk stage:** your site may include a Let's Talk step before final approval. Your Care Champion will reach out to schedule a brief conversation. Respond promptly — your application will not advance until this step is completed.
- **Watch for the approval email.** Once your Care Champion approves your application, POINT sends you an email. Click **View Events** to begin registering for RC shifts.

Timeline: Your Care Champion aims to review applications within 5 business days. If you have not heard back after that time, contact them directly. Do not resubmit your application.





Step 4: Complete Your Background Check

Policy: Background check clearance may be required before serving in any Resource Coordination shift. If your site requires a background check, do not attempt to serve until you receive confirmation that your check has been approved.

If your site requires a background check, POINT will prompt you automatically during or after the application process.

How to Complete It:

- If you have been requested to complete a background check through POINT, you will be asked to navigate to **Background Check**.
- Click **Start** to be redirected to the secure background check portal (Checkr, Sterling, or your organization's provider).
- Enter your personal information and consent to the check.
- Submit and return to POINT. The system automatically updates your status when it receives results.
- Any volunteer who has been requested to conduct a background check through POINT will be able to access it on their Volunteer Dashboard. You will see a section on the left-hand side labeled Background Check, or you can go to Manage Their Account, where you will also find a Background Check dashboard. This is only visible to those who have been asked to complete a background check through Checkr.

Background Check Status Guide:

Status	Meaning
Pending	Your background check has been submitted and is still processing. Normal processing time varies by provider.
Completed / Approved	You are cleared to volunteer. Your Care Champion has been notified.
Needs Attention	Missing information or a form that must be resubmitted. Check your email for instructions from the provider.

POINT will notify you by email when your background check is approved.



Privacy: Your background check results are processed by the provider (Checkr/Sterling) and are not visible to your Care Champion in full detail — only your cleared/not-cleared status.





Step 5: View and Sign Up for Resource Coordination Shifts

Policy: All Resource Coordinators must be registered in POINT for every shift they serve. Arriving for an unregistered shift does not constitute recorded service. Register as early as possible — shifts have limited slots.

How to Find and Register:

- Sign in at pointapp.org. Under **My Organizations**, select your CityServeX site.
- Browse available events to see all published Resource Coordination shifts.
- Select the event that matches your available date and time to view full shift details.
- Click **Sign Up To Volunteer** (top right of the event page).
- Select the specific shift time you want to attend.
- You may select **more than one shift** after clicking Next — helpful for signing up for recurring dates.
- Confirm your shift selections.
- Opt in to SMS notifications if desired — this gives you text reminders before each shift.

Registration Status:

After signing up, check **My Registrations** on the left side panel to verify your status.

Status	Meaning
Pending	Your registration is awaiting Care Champion approval (if your site uses manual approval).
Approved / Signed Up	You are confirmed for this shift. Show up and check in.
Canceled	Registration has been canceled — either by you or by an admin.

Register early: Slots fill up. Early registration helps your Care Champion plan staffing and reduces the chance of an understaffed shift. If you want a specific recurring time slot, register for multiple dates at once.





Step 6: Track Your Registration Status

Policy: Resource Coordinators are responsible for monitoring the status of their own registrations. If a registration remains in Pending status for more than 5 business days, contact your Care Champion directly.

- Navigate to **My Registrations** on the left panel of your POINT dashboard.
- Review the status of each registered shift.
- Look for **Approved** status. If a shift remains **Pending** past 5 business days, contact your Care Champion — do not assume it will auto-approve.

Your confirmation: You should receive an email from POINT when your registration is approved. If you don't receive a confirmation within the expected timeframe, log in and check My Registrations directly rather than waiting.





Step 7: Canceling or Changing a Shift

Policy: If you need to cancel a registered shift, do so in POINT as early as possible AND notify your Care Champion directly. Platform cancellation alone is insufficient — your CC needs to know so they can backfill the slot.

How to Cancel in POINT:

- Navigate to **My Registrations**.
- Select the shift you need to cancel.
- Click **Cancel Registration**.
- Confirm the cancellation. This frees the slot for another volunteer.

After Canceling in POINT:

Contact your Care Champion directly by phone or message. Explain why you are canceling and whether you need to reschedule. Your CC cannot see real-time notification — a personal heads-up is always required.

The earlier, the better: A cancellation 48 hours out gives your CC time to backfill. A same-day cancellation is genuinely difficult for site operations. Treat your shift commitment seriously — the participant expecting help on the other end is counting on someone showing up.





Step 8: Checking In for Your Shift (Automatically done for you)

Policy: POINT automatically checks you in once you have signed up for a shift(s). No check-in is required.

Use the following directions **ONLY** if the automatic check-in did not register your hours.

How to Check In:

- **Locate your Check-In Station URL:** scroll to the bottom of your shift description in POINT. Click the URL listed under Step 1. Make sure it is the link specific to your site.
- Open the URL on your phone. **Tip: favorite it so you don't have to look it up each shift.**
- If you have the POINT app or know your password: use the **QR code** on the check-in screen to clock in.
- If you don't know your POINT password: **type your name in the search bar** on the check-in screen to find your record.
- Your shift should populate if you are registered. Select it and confirm your check-in.
- **Check out** at the end of your shift using the same station if your site uses manual check-out.

Check-In Troubleshooting:

Situation	What to Do
I forgot to check in.	Contact your Care Champion immediately after your shift. They can manually mark you as Checked In or approve self-submitted hours.
The Check-In Station link doesn't work.	Notify your Care Champion before or during your shift. Complete your service and let them resolve the hours afterward.
My shift isn't showing on the check-in screen.	The station only shows same-day and near-day events. Confirm the shift is scheduled for today. If it is, contact your CC.
The QR code scanner isn't working.	Use the name search instead — type your name in the search bar on the check-in screen.

Timing: The Check-In Station displays events for the same day and up to 24 hours before the shift. Do not try to check in for a shift that is not today.



Step 9: Logging Extra Hours

Policy: If you serve outside a scheduled shift or your check-in did not record properly, you must log extra hours manually. All manually submitted hours require Care Champion approval before they are official.

How to Log Extra Hours:

- Click **+ Add Hours** from your volunteer dashboard.
- In the **Organization** tab, select the correct CityServeX site location.
- Select the **Program**: Resource Coordination.
- Fill out **What did you do?** — include a brief description of your service. **Note your location** in this field.
- Add your **Start Date, Start Time, and Duration**.
- Click **Add**.
- Your Care Champion (Site Leader) will receive a notification and must approve before hours are recorded.

Within 48 hours: Submit extra hours as close to your service date as possible. The further the submission gets from the event, the harder it is to verify and approve. Don't let unrecorded hours accumulate.





Step 10: Your Activity Dashboard

Policy: Resource Coordinators are responsible for monitoring their own hours and confirming that submitted hours move from Pending to Approved. If an approved hour does not appear within 5 business days of submission, contact your Care Champion.

How to Access Your Dashboard:

- Click the **Activity** tab on the left panel of your volunteer dashboard.
- View your summary: total hours served, number of shifts registered, and total donations (if applicable).
- Click the **Hours** tab to see the status of all your submitted hours.

Status	Meaning
Pending	Your hours have been submitted and are awaiting Care Champion approval.
Approved	Your Care Champion has confirmed the hours. They are now official in your record.
Denied	Your submission was not approved. Your CC should have added a note explaining why. Contact them if you need clarification.

Your hours are your story. Every shift recorded here represents real service in the community. Keep your Activity Dashboard accurate — it feeds into CityServeX's site-wide impact reporting and honors the work you're doing.





Step 11: Need Help?

Policy: For any platform issue, your first contact is always your Care Champion (Site Leader). For general POINT technical support not related to CityServeX configuration, POINT's own support channels are available.

Your Help Hierarchy:

Contact	Use When
Your Care Champion (Site Leader)	Application questions, shift access issues, hour discrepancies, account problems, or anything CityServeX-specific. This is always your first call.
PIP (POINT AI Chatbot)	General platform navigation questions, feature explanations, how-to guidance. Available 24/7 inside POINT.
Live Human Support via PIP	Ask PIP to transfer you to a human. Available Monday–Friday, 9 AM–5 PM EST.
support@pointapp.org	Direct email support for technical issues PIP cannot resolve. Use only for non-CityServeX-specific questions.
POINT Volunteer Support Page	Self-service knowledge base at pointapp.org . Search for any platform feature.

Always start here: Contact your Care Champion first for anything related to your CityServeX application, shifts, or hours. POINT's support team handles platform technology. Your CC handles everything CityServeX.

You're Not Just Logging Hours.

Every time you check in for a shift, it isn't just a timestamp. It's evidence that someone showed up. That the community didn't just talk about caring for neighbors — it did something. POINT captures that. Your hours are your story.





Eleven steps. That's all it takes. Get your account, complete your application, sign up for shifts, check in, log your hours. The rest happens in the room — between you, the people you serve, and the resources that change their situation.

CityServeX. Everyday. All Lanes.

