

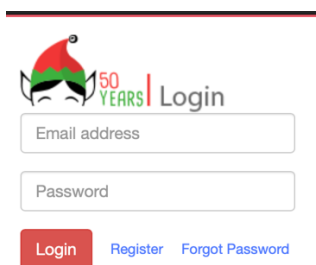


SANTA'S HELPERS, INC.

Santa's Helpers, Inc. is a 100% volunteer-based non-profit organization serving St. Louis's under-resourced and seriously ill children and their families since 1968. Santa's Helpers touches the lives of over 3,000 children and their families every holiday season by purchasing, wrapping and delivering gifts for Christmas and Hanukkah to deserving children whose names are provided by local schools and social service agencies.

Registration:

Every Social Worker or Referral Agent must be registered in order to refer families to Santas Helpers Stl. The registration process consists of 2 parts. You can find the registration screen by going to User Login and then clicking on Register.



- Part 1: Fill out the user registration form in its entirety, please do not leave items blank as that may lead to delayed approval.
 - We do not accept email addresses that are not associated with an organization (@gmail.com, @hotmail.com, @yahoo.com as an example are not accepted).
 - Please ensure that there is a valid phone number for us to contact you.
- Part 2: Once you have completed the registration form and clicked on submit, a Santas Helpers Board Member will accept/reject or contact you if further information is needed.

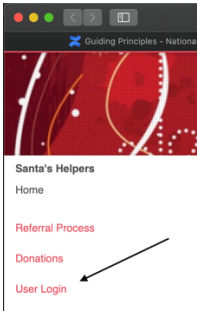
*** For new or unfamiliar organizations which are registering for the first time, please expect a phone call for further information about your organizations charter.*

Family Referral Process:

Each year around October, we open our registration to St Louis Local Schools and Social Service Agencies. In an effort to meet the needs of the families that are being serviced, we have automated the referral process through our website which has helped speed up the process for the submission and approval. The referral process steps below are a guide to help those Agencies complete the registration form and provide a user interface to check the status of those referrals. The following section provides details around how to login, create/complete the referral form and also use the portal to check the status for all of your referrals.

Login:

To access the login screen simply goto <http://santashelpersstl.com> and then click on the user login menu item.



The login screen will be presented, here you will put in your userid (email address) and password that you registered with.

The login form features a header with a Santa hat icon and the text '50 YEARS | Login'. Below the header are two input fields: 'Email address' and 'Password'. At the bottom, there are three buttons: a red 'Login' button, a blue 'Register' link, and a blue 'Forgot Password' link.

Login: Simply input your email address and the password combination and then click Login.

Post login you will be presented with your Santas Helper Portal. Here you can create a referral and check the status of existing referrals.

Forgot Password:

If you have forgotten your password, simply click on forgot password, enter your email address and click on submit:

The 'Forgot Password' form is enclosed in a light gray box with a red lock icon in the top left corner. The title is 'Enter your registered email address'. Below the title is a text input field containing 'test@test.com'. Underneath the input field is a note: 'Registered emails do not end in @gmail.com, @hotmail.com, @yahoo.com and must be associated with a known agency domain.' At the bottom center of the form is a red 'Submit' button.

If we find it in our system you will be displayed with a password reset process. Please follow the password guidelines outlined in the reset process in order to successfully change your password.

- Kris Kringle -

Please create a secure password including the following criteria below.

- 1st character must be a letter
- Minimum of 8 characters
- Atleast 1 uppercase letter
- Atleast 1 lowercase letter
- Atleast 1 number
- Atleast 1 special character

Password

Confirm Password

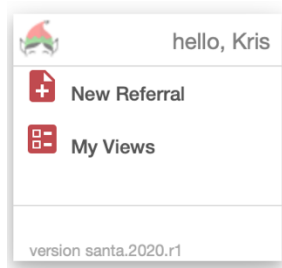
If you have met the first password guideline and repeated in the confirm password the update button will become active and you will be able to reset your password. Once resent you may then login and access the Santas Helpers Portal.

Portal Details

After you successfully login you will see the Santas Helper Portal which is your primary work zone. Please note that if your browser remains idle for 30 minutes the portal will log you off and you will have to log back in.

**Please note based off of browser settings and conditions you may have to refresh your browser several times to get the login screen back.

User Portal:



The user Portal has 4 items of importance:

1. Name Recognition: hello, {Name} should always say your name.
2. New Referral – This is the action to create a new referral – you will not be able to create a referral without logging in.
3. My Views – this is where you would click to find the status of your referrals, create new referrals, update a referral that has been rejected and see if the referral is will-call or delivery.
****All 2020 Referrals are Will-Call only due to COVID-19 restrictions.**
4. Version Number – this will be important if you are experiencing issues with the site, one of our tech leads will ask you for the version number to ensure you are not trying to use a saved version of the website.

New Referral:

There are two ways to create a referral.

- From the Portal Menu
- From the My Views

To create a new Referral from the portal menu simply click on 'New Referral'.

The 'Refer a Family' screen will appear that has 4 sections that need to be properly filled out.

Section 1 – Family Detail:

List section is for the Surname of the family (Primary) and their contact phone, race (used for ethnic toys selection) and Holiday celebrating.

- Referrals have to have a Primary Surname and valid working contact phone.
- Phone numbers must be in the format of (###) ###-####. Please ensure that the phone numbers are listed properly.

Section 2 – Address:

A valid working address is also required to ensure that the referral is accepted. Please ensure that the address is valid and the zip code is entered correctly. To validate the address please use google maps or any other map program that will help with validating the address prior to entry. Having the correct zip code will ensure that the santas have the correct route when doing delivery.

****All 2020 Referrals are Will-Call only due to COVID-19 restrictions. However, we will still need valid addresses for historical reference.**

Section 1 – Family Member Details:

This section is used to list all family members that reside in the house-hold. Please ensure that you add a family for each person. To add a family member use the following steps.

Step 1: Click on the 'Add Family Member' button

Add Family Member

Step 2: Enter the details of the family member

- First Name
- Age
- Gender
- Clothing Size

Please Follows Step 1 and 2 for each family member you are adding. So if you have 5 household family members you should have clicked 'Add Family Member' five different times while adding in the details of step 2. Please see example of a 5 family member submission.

Family Member(s) Details

List all family members residing in the household. ^

Add Family Member

First Name *	Age *	gender	Clothing Size
Elf 1	2	male	2T
Elf 2	14	female	Adult size 6
Elf 3	19	male	Adult X-Large
Elf 4	32	female	Adult size 14
Elf 5	56	female	Adult size 16

If you had added all the family members residing in the household, proceed on to step 4.

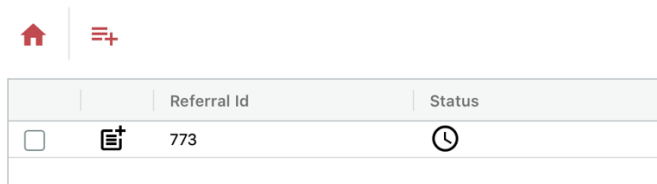
Section 4 – Additional Details:

Fill out all items that are applicable to the family in this section, the more information you provide will help us determine if we are going to accept or reject the referral. Please fill out this section carefully.


After you have completed step 4 click on the 'refer' button. You will receive a confirmation that the referral has been received. Please note that do to the safety and security of our families we will not be providing email confirmation that the referral was received. You can check the status in the 'My Views' section of the website.

Creating a referral from 'My Views'

If you are already logged in and have clicked on 'My Views' you will see a list of menu icons above the data grid (see image below).



Each icon has a hover over help feature that will explain what the icon is. For instance if you hover over the house icon you will see that a pop-up will show 'home'. This will take you back to the main login screen or back to santashelpersstl.com.

To create a new referral from the 'My Views' section simply click on the 'create referral' button , you will then be presented with the 'Refer a Family' as described in the previous section of this user guide. Please follow the steps outlined from Section 1 – 4 and the click on 'refer' to submit the referral.

My Views

Navigating through the 'My Views' section is designed to be easy and user friendly. Whithin this view you will see a list of all your referrals (by year), the status of the referral, edit ability of the referral (rejected only), and the ability to look at the full details (printable version) of the referral and details if it was rejected and why.

After you click on 'My View' you will see a table view of the application that shows a Year selector, Useful Icons and a table of all the referrals (see example below).



	Referral Id	Status	Last Name	Number of Children	Special Needs	Age(s)	Sex
<input type="checkbox"/>	775	🕒	Jones	4	No	3, 8, 23, 49	female, male, female, female
<input type="checkbox"/>	773	⚠️		5	No	2, 14, 19, 32, 56	male, female, male, female, f...

In the example above you will see that the referrals listed are for the year 2020. You can find the year on the top right-hand corner of the screen. To check prior years referrals simply click on the drop down and select the year that you are wanting to look at historical data on. You will also see that your name should be listed as Santa's Helper: {name} (user profile).

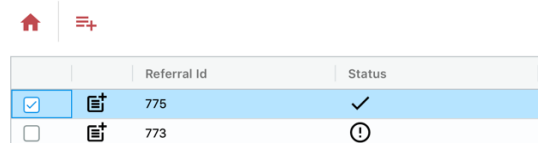
****User profile options will be coming soon.**

The following icons are used to show the status of each referral.

- 🕒 Pending
- ✓ Approved
- ⚠️ Rejected

The check box (image 1) in the first column of the grid when checked will provide the full details of the referall on the right side of the viewable section of the website (image 2).

Image 1 (Checkbox in Grid):



	Referral Id	Status
<input checked="" type="checkbox"/>	775	✓
<input type="checkbox"/>	773	⚠️

Image 2 (selection with Details):

The screenshot displays a web interface for managing referrals. On the left, a table lists two referrals:

	Referral Id	Status	Last Name	Number of Children	Special Needs
<input checked="" type="checkbox"/>	775	✓	Jones	4	No
<input type="checkbox"/>	773	ⓘ		5	No

Navigation controls at the bottom of the table show '1 to 2 of 2' and 'Page 1 of 1'.

On the right, the 'Referral Details' section for Referral (775) is shown. The status is 'Approved'. The 'Status Change Information' states: 'This referral has been accepted for will-call pickup on Dec 23 between 1-3pm CST'. Below this are sections for 'Referral Organization Details', 'Family Details', and 'Family Member Details'.

Referral Organization Details:
 Name: Kris Kringle
 Phone: 6364398501
 Email: test@test.com
 Organization: Santa's Helpers

Family Details:
 Referral Id: 775
 Last Name: Jones
 Phone: (636) 555-1234
 Race: African American
 Celebrated Holiday: Christmas

Address:
 1 Holiday Lane
 St Louis, Missouri 63312

Family Member Details:

First Name	Age	Gender	Clothing Size
Elf 1	3	female	4T
Elf 2	8	male	Youth Medium

In the example above the item selected is an Approved referral. The details on the right indicate Approved with the Status Change Information.

Status Change Information – In this section you will find the reject reason, what needs to be fixed or if approved the details around the delivery or will-call information. Please check the status details if you are you have questions around the status change.

Rejected Referral:

If the item is rejected the following icon will show in the data grid, the only time you can edit a referral is if it is rejected.

If you click the icon for the rejected referral an 'Update Referral' dialog box will be presented. Please update the fields that are outlined in the *Status Change Information*. Once you make the correct changes click on 'Update' and the referral will be resubmitted for approval.

Update Referral

Family details ^

last name * phone * race -- v

celebrated holiday -- v

Address v

Family Member(s) Details v

Additional Details v

Update Cancel