

How to: Make calls with Virtual Phone Bank

Virtual Phone Bank (VPB) allows you to participate in a campaign or organization's outreach effort from anywhere. While you make calls you can view information about the people you're calling alongside your script and enter responses as you go.

To begin, you will need two things:

- A **phone bank code** provided by your organizer
- An **ActionID**, which you can set up using an email address and a password of your choice. Check with your organizer to see if you will receive a login invitation.

If your campaign or organization is using **Daily Access Codes**, you will be prompted to enter one after you login with ActionID.

You can make calls one of two ways:

- Make calls on your mobile device or landline and **view the phone bank on a computer or tablet**
- Make calls on your mobile device and **view the phone bank on your mobile device at the same time**. VPB is mobile responsive. You can click on a phone number to place a call.

You may also be asked to access the phone bank via:

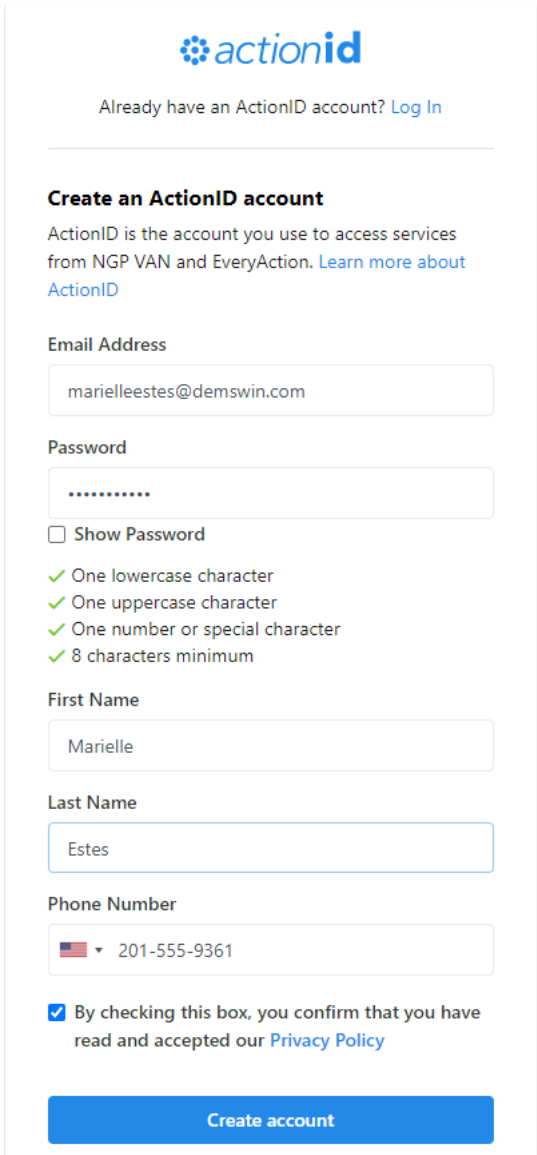
- A **campaign or organization database** where a non-open VPB is set up
- **OpenVPB** (openvpb.com), where you will create or log in with an ActionID to make calls.

OpenVPB is compatible with screen readers and can be accessed from a mobile device.


If your campaign or organization is using **Daily Access Codes**, you will be prompted to enter one after you enter the OpenVPB code.

Logging in to OpenVPB

If you're using OpenVPB, go to openvpb.com. If you are not already logged into an ActionID, you will be redirected to log in with an existing ActionID or create one from the login page by selecting **Create account**.



The screenshot shows the ActionID account creation page. At the top is the ActionID logo and a link for existing users. Below is a section titled 'Create an ActionID account' with a brief description and a link to learn more. The form includes fields for Email Address (marielleestes@demswin.com), Password (masked with dots), First Name (Marielle), Last Name (Estes), and Phone Number (201-555-9361). There are also password requirements, a checkbox for terms of service, and a 'Create account' button.

 **actionid**

Already have an ActionID account? [Log In](#)

Create an ActionID account

ActionID is the account you use to access services from NGP VAN and EveryAction. [Learn more about ActionID](#)

Email Address

Password

Show Password

- ✓ One lowercase character
- ✓ One uppercase character
- ✓ One number or special character
- ✓ 8 characters minimum

First Name

Last Name

Phone Number

By checking this box, you confirm that you have read and accepted our [Privacy Policy](#)

Create account

When you select **Create account**, set up Two-Factor Authentication (2FA) and return to openvpb.com to log in. Depending on the link your organizer provided, you may be prompted to enter an access code.



Start Making Calls

Open Virtual Phone Bank (OpenVPB) is your tool to make phone calls to voters and automatically record their responses for your organization.

[Get Started](#)

If you have been given a Daily Access Code, you will be prompted to enter it after selecting **Get Started**.



Enter Daily Access Code

Enter the 6-digit daily access code your organizer provided to you.

Daily Access Code *

[Verify](#)

If you have any issues, please contact your organizer. Depending on the OpenVPB setup, contact information may be available at the top of your screen on this page.

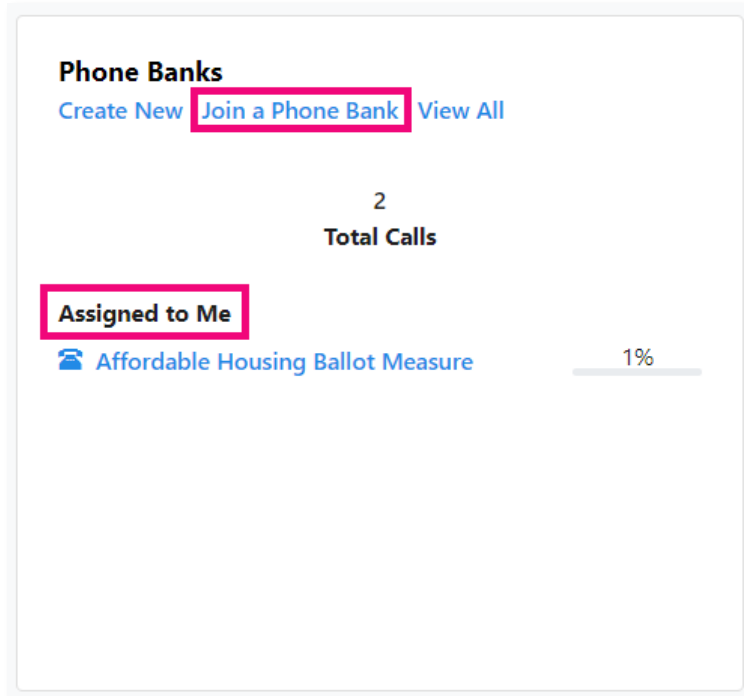
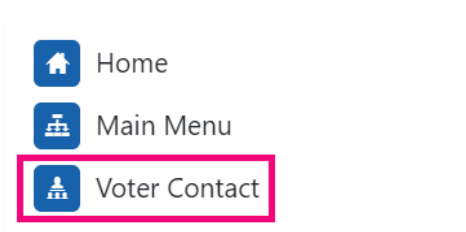
 If you have questions about this phone bank, please contact: Yari Zink • (201) 555-3244 • zinky@peopleforgood.org

Logging into Virtual Phone Bank

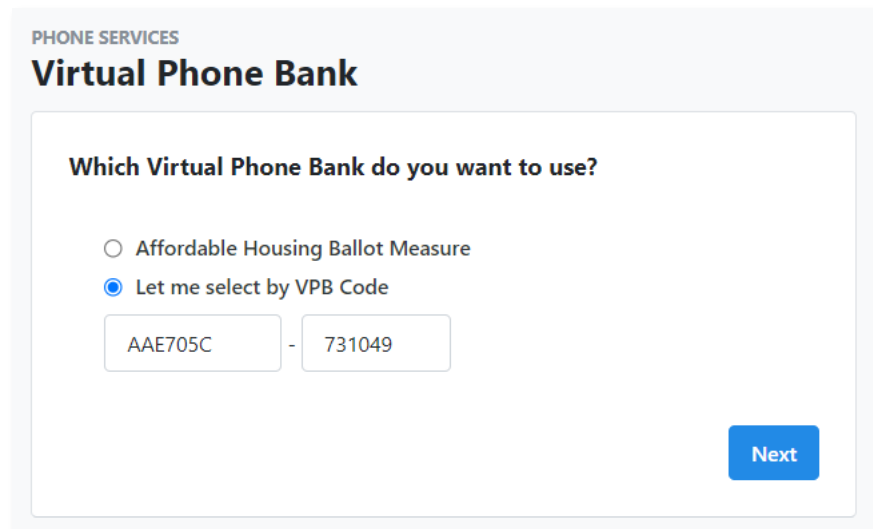
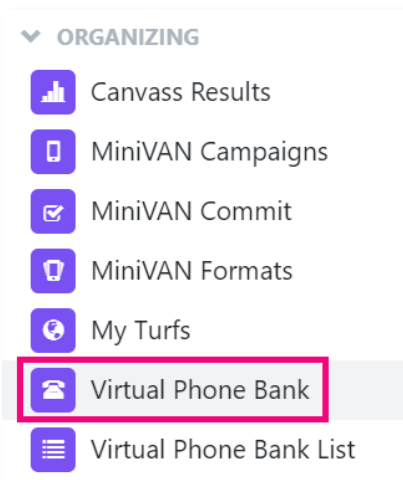
Login to VAN with your ActionID. If you have access to My Voters and My Campaign, ask your organizer which side of VAN you should phone bank from.

You can begin phone banking with VPB one of two ways:

- Open **Voter Contact** from the Sidebar. You may see phone banks under **Assigned to Me**. Otherwise, you can select **Join a Phone Bank** and enter the access code provided by your organizer.



Open **Virtual Phone Bank** from the Sidebar. Select the phone bank assigned to you or enter the access code provided by your organizer.



You will see a brief summary of how VPB works.

PHONE SERVICES

Virtual Phone Bank

Affordable Housing Ballot Measure

Welcome to Virtual Phone Bank. We'll show you names and phone numbers for 120 minutes, along with a script to read. Please call each person and fill in their responses on the screen as you go along.

[Next](#)

Making calls and entering results

During your call, you will see the name and number of the person you're calling.

If you're using VPB, you may also see a progress bar letting you know either the number of calls you've made against the total number of contacts or against your individual limit, depending on how the phone bank is set up.

VIRTUAL PHONE BANK

Affordable Housing Ballot Measure

Schedule For Events Skip Save & Next Call

Phone Bank Progress (526/2040)

Marjorie H Hieronymus – 79 F **(555) 552-2092**

Voter File VANID: 367422

[I Couldn't Reach Marjorie](#)

If you have questions about this phone bank, please contact:
Yari Zink
(202) 555-6990
zinky@vpb.com

Script Additional Info

Making calls in OpenVPB looks slightly different, but entering results works the same way.

About Sarah

Preferred Phone
(555) 222-3481

Also In Household: [Jane Allen](#) [Steven Allen](#) [Lisa Allen](#) [Matthew Allen](#) [More...](#)

Sarah Allen
(555) 222-3481
35 F

[Save & Next Call](#)

[I Couldn't Reach Sarah](#)

Hi! I'm _____ with DLC. We're growing our volunteer team to help build community support for a ballot initiative ahead of the election.

This election cycle there is a ballot initiative to preserve and grow affordable housing. Will you support it?

[Choose an option](#)

In the event you are unable to reach the person you called, select **I Couldn't Reach** and enter the reason.

Linda S Galstad – 65 F

Voter File VANID: 442732

I Couldn't Reach Linda

- Not Home
- Refused ?
- Deceased
- Moved
- Call Back
- Busy
- Left Message
- Wrong Number ?
- Disconnected ?

Cancel

Your script is displayed beneath your contact information.

Script

Hi! My name is _____. I'm volunteering with Left Wins. How are you today?

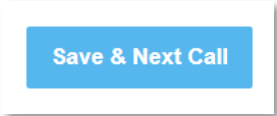
This election cycle there is a ballot initiative to preserve and grow affordable housing. Will you support it?

Y ▾

Will you sign up to volunteer and bolster support for this ballot measure?

Housing Vol

Once you complete the script (and, if necessary, enter in notes or update information about a contact), select **Save & Next Call**.



In some cases, the campaign or organization you're phone banking for will provide a **Designated Contact** (someone you can call or email should you have questions while making calls). If that information is not available, contact your organizer with questions.

In **VPB**, the Designated Contact information appears to the right of the information for the person you're calling.

If you have questions about this phone bank, please contact:
Yari Zink
[\(202\) 555-6890](tel:(202)555-6890)
zinky@vpb.com

In **OpenVPB**, the Designated Contact information appears above the information for the person you're calling.

If you have questions about this phone bank, please contact: Yari Zink • [\(202\) 555-6890](tel:(202)555-6890) • zinky@vpb.com

Also In Household: [Judith Shepard](#) [Krista Shepard](#)

Households

Some numbers are **shared by multiple people in a single household**. In that case, each person is assigned a tab and you can toggle from one to the other to record responses from each household member.

Also In Household: [Vikki Vanhauen](#) [Tamara Vanhauen](#)

Tamara Vanhauen
[\(555\) 690-8222](tel:(555)690-8222)
47 F

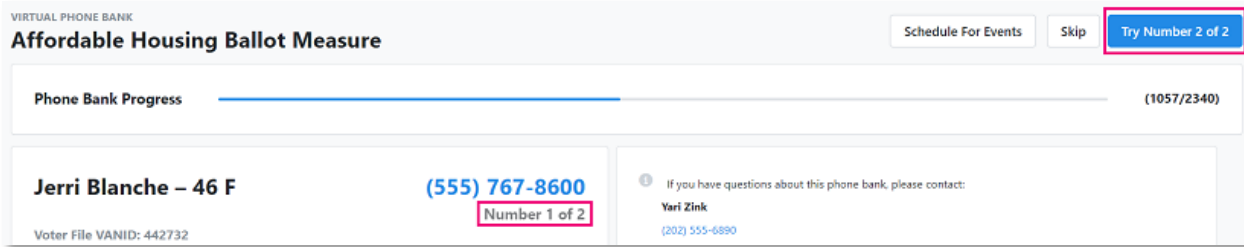
[Skip](#) [Save & Next Call](#)

[I Couldn't Reach Tamara](#)

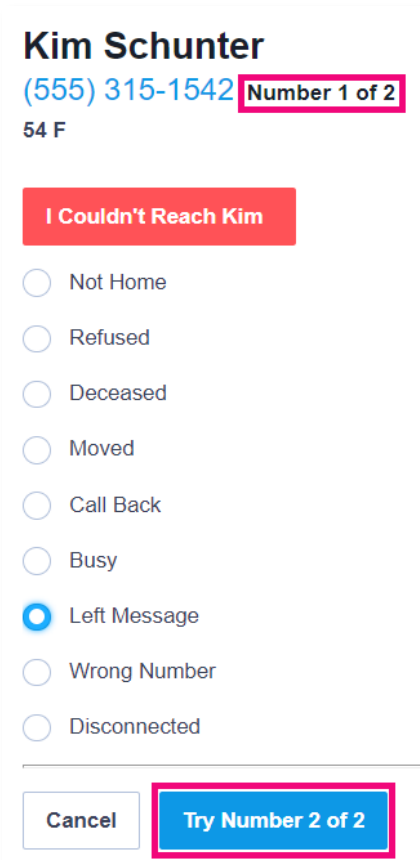
Calling through alternative numbers

Occasionally, a single person will have multiple numbers.

In **VPB**, the button to try an alternative number is located on the upper right of the screen. Only proceed to the next number if you are unable to reach a contact with the first.



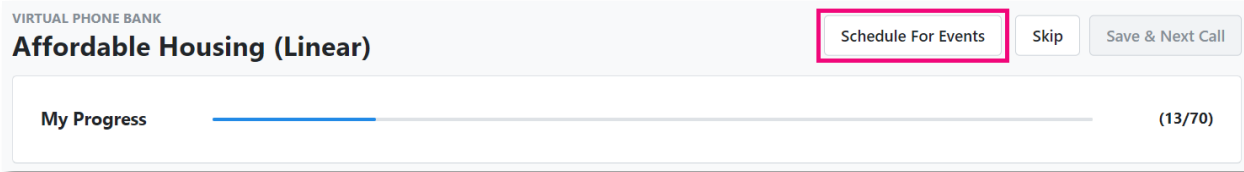
In **OpenVPB**, the button to try an alternative number is located below the list of reasons you were unable to reach your contact.



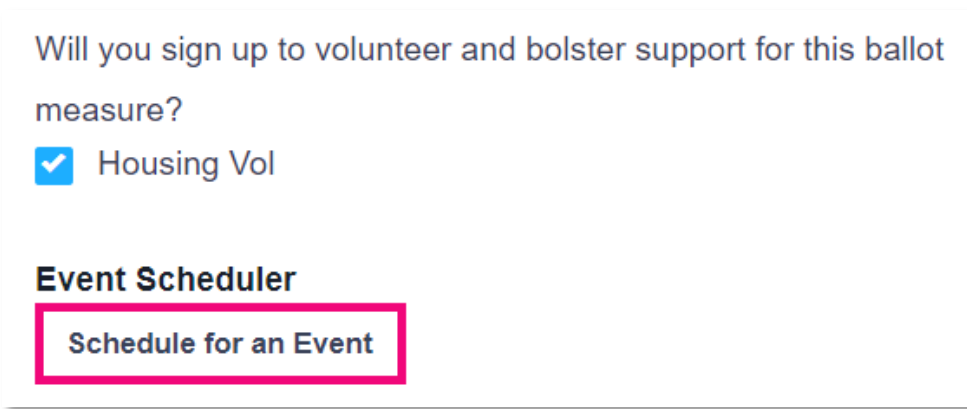
Scheduling people for events in Virtual Phone Bank

When making calls, you may be asking people to attend events.

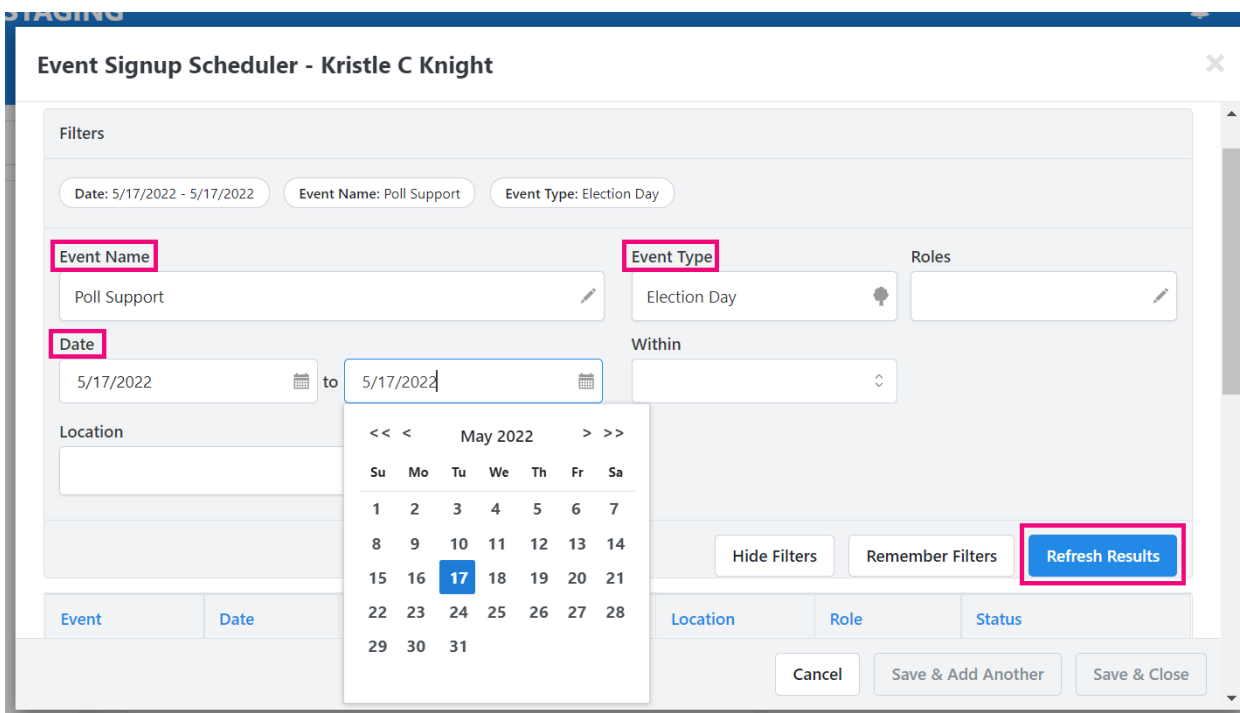
In **VPB**, the button to **Schedule for Events** is located on the upper right of the screen.



In **OpenVPB**, the button to **Schedule for an Event** is located below your script.



In **VPB**, the scheduler may include multiple events. Edit filters to narrow the event selection by type, name, and date, then select **Refresh Results**.



The Event Scheduler will show you all the available shifts for an event.

In **VPB**, use the **Status** dropdown to record responses. Communicate with your organizer to ensure you're updating statuses appropriately.

Event Signup Scheduler - Joann Dickinson

Hide Filters Remember Filters Refresh Results

Event	Date	Time	Total Shift Time	Location	Role	Status
Poll Support (Opening)	Tue 5/17	6:00 AM - 9:00 AM	3 hours		Volunteer	
Poll Support (Morning)	Tue 5/17	9:00 AM - 12:00 PM	3 hours		Volunteer	
Poll Support (Lunch)	Tue 5/17	12:00 PM - 3:00 PM	3 hours		Volunteer	
Poll Support (Afternoon)	Tue 5/17	3:00 PM - 6:00 PM	3 hours		Volunteer	Scheduled
Poll Support (Closing)	Tue 5/17	6:00 PM - 9:00 PM	3 hours		Volunteer	

Cancel Save & Add Another Save & Close

In **OpenVPB**, use **Choose an option** to record responses.

Schedule for an Event

May 17 Poll Support Tuesday at 6:00am EDT Role: Volunteer Choose an option

May 17 Poll Support Tuesday at 9:00am EDT Role: Volunteer Choose an option

May 17 Poll Support Tuesday at 12:00pm EDT Role: Volunteer Choose an option

May 17 Poll Support Tuesday at 3:00pm EDT Role: Volunteer Choose an option

May Poll Support

Cancel Save