# SvdP Database for New Members

The three most common activities involving interaction with the SVDP Database by active advocates are:

> **Searching the Database -** to determine if there is an existing client record established for someone who has left a message on the hot line so that the responsible advocate can be notified
>
> **Creating/Updating Client Records** for someone who has contacted the Help Line asking for help and meets the criteria of either residing in our Zip Code or is a Parishioner.
>
> **Creating/Updating History Records** associated with the client interactions that occur each time there is a request for help

**Searching the database** is most commonly used to locate a client record for existing clients or to determine if a client record exists for a potential new client. Some conferences use the Find function to search for an existing record by looking not only for the name, which might be misspelled, but also for a matching phone number or DOB.

The initial screen presented upon logging into the database provides several access / search options.

Most useful when searching for a client record is the “Find” function. Some members also find the alphabet very useful. By clicking on the first letter of the last name, a list of records is displayed. Scrolling through the list or using the Ctrl F keys to further search for a name is easy to do.

**Demo**
**Find record**

Global Search [ ] My Cases | Add New Record | Find | Reports | Minutes | Schedule | Functions Select Function

Enter one or more characters of the first or last name, the case number, phone number or the Record number and click on the find button. If only one record is found, that record is displayed. You can also submit the form by pressing the "Enter" key.

Last name: [ ] First name: [ ] Case number: [ ]

Phone number: [ ] DOB: [ ] Record number: [ ]

Find record

This search function is case insensitive.

Note: All Apartment and Landlord records have a last name of Manager. If you want all the records you can enter manager in the last name. If you want a specific record, enter a substring of the apartment or landlord name in the first name field.

A ^ in front of the search string will return only those records that start with the search string.

A $ at the end of the search string will return only those records that end with the search string.

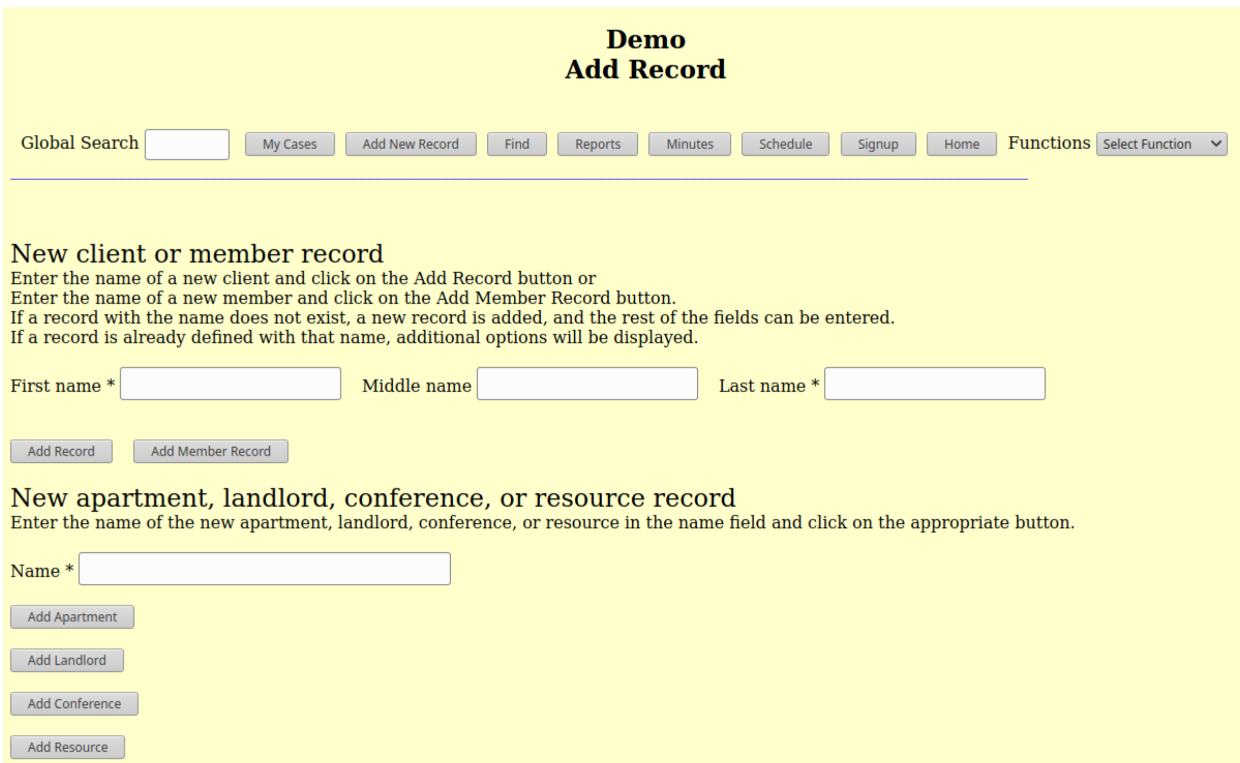
Note: When entering search criteria into the find record screen spelling and hyphenating must match what exists in the record in order for the search / find to be successful. The whole string does not have to be entered. Examples: The first 4 or 5 letters of the last name or the last 4 digits of a phone number may be sufficient. DOB must be a complete date in the format: MM/DD/YYYY.

The My Cases function is useful for displaying the records that have the member’s name in the advocate field. The records are displayed so that those being worked on are displayed before those that are “done”.

Records that have New Member listed as an advocate

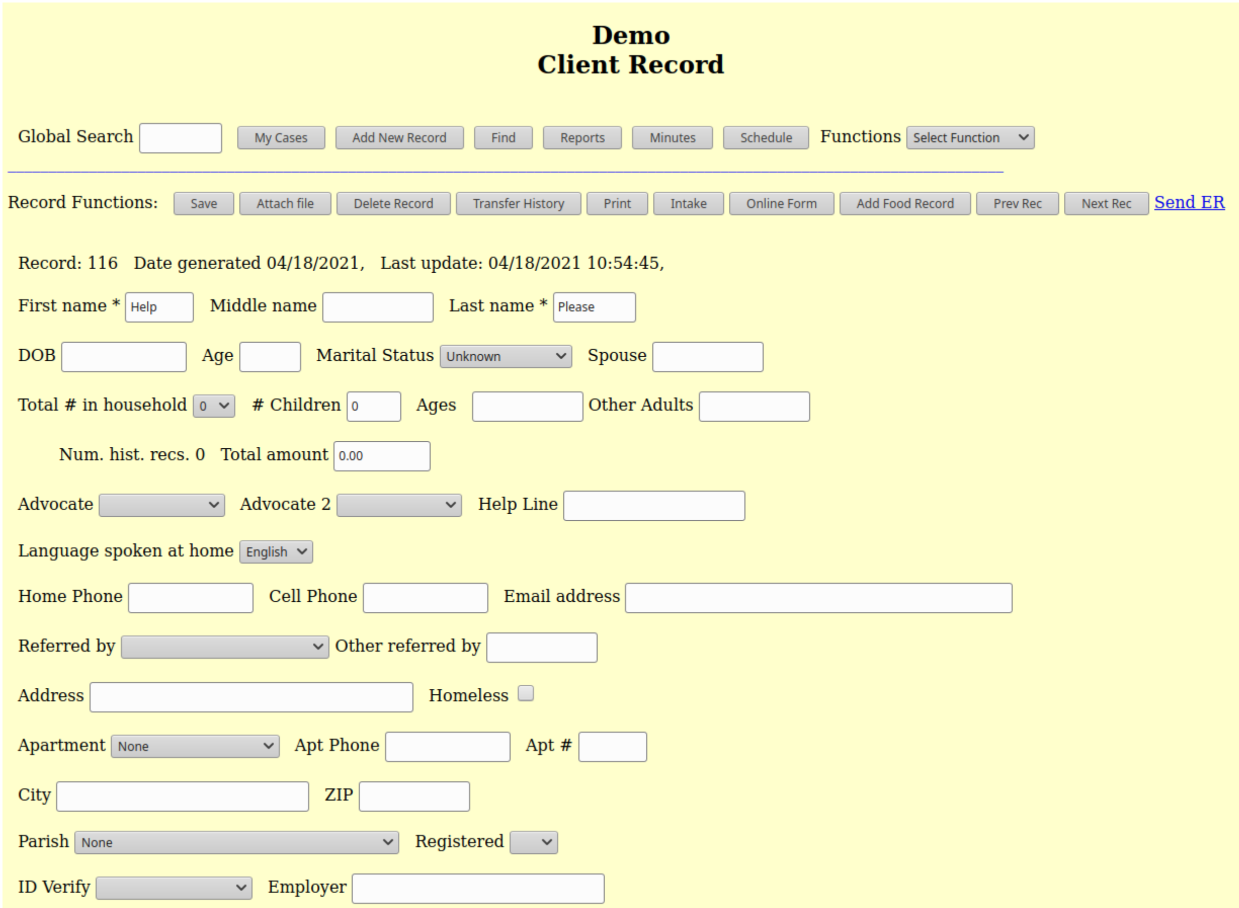
| Record | Name | Process | Nbr. Cases | Total Amount |
|---|---|---|---|---|
| 68 | Client, New | assigned | 1 | 10.00 |
| 57 | Client, Previous | done | 1 | 0.00 |

**Creating a new Client record** is required when a prospective client makes contact, typically through a call to the Hot Line and meets SVDP criteria for being helped (qualifies by either living within the Conference geographic boundary or is a Parishioner). Typically the Hot Line Advocate who has interacted with the prospective client creates the base Client Record utilizing the Add Record screen followed by the New Client screen. Entering all applicable detail information about the client is done by the Advocate(s) following the meeting with the new client.




Enter the name (first and last name are required) and click on the Add Record button for a client or Add Member Record button for a member.

Entering “Please” in the last name and “Help” in the first name and clicking on Add Record resulted in the next screen in the Demo database. Note that only the name is displayed and the record is in edit mode (yellow background). The user can enter the rest of the data and then click on the Save button.



**Demo**
**Client Record**

Global Search [ ] My Cases | Add New Record | Find | Reports | Minutes | Schedule | Functions [Select Function]

Record Functions: Save | Attach file | Delete Record | Transfer History | Print | Intake | Online Form | Add Food Record | Prev Rec | Next Rec | Send ER

Record: 116 Date generated 04/18/2021, Last update: 04/18/2021 10:54:45,

First name * [Help] Middle name [ ] Last name * [Please]

DOB [ ] Age [ ] Marital Status [Unknown] Spouse [ ]

Total # in household [0] # Children [0] Ages [ ] Other Adults [ ]

Num. hist. recs. 0 Total amount [0.00]

Advocate [ ] Advocate 2 [ ] Help Line [ ]

Language spoken at home [English]

Home Phone [ ] Cell Phone [ ] Email address [ ]

Referred by [ ] Other referred by [ ]

Address [ ] Homeless [ ]

Apartment [None] Apt Phone [ ] Apt # [ ]

City [ ] ZIP [ ]

Parish [None] Registered [ ]

ID Verify [ ] Employer [ ]

The data filled in by the helpline person is defined by the conference but is generally the following:

Email Address: (This makes it possible for advocate to share resource book)

Process: Assigned

Advocate: Lead Advocate on the schedule for the day

Address: including Apartment, City and Zip Code

Telephone number: Home or Cell field whichever applies

Apartment Complex: if applicable

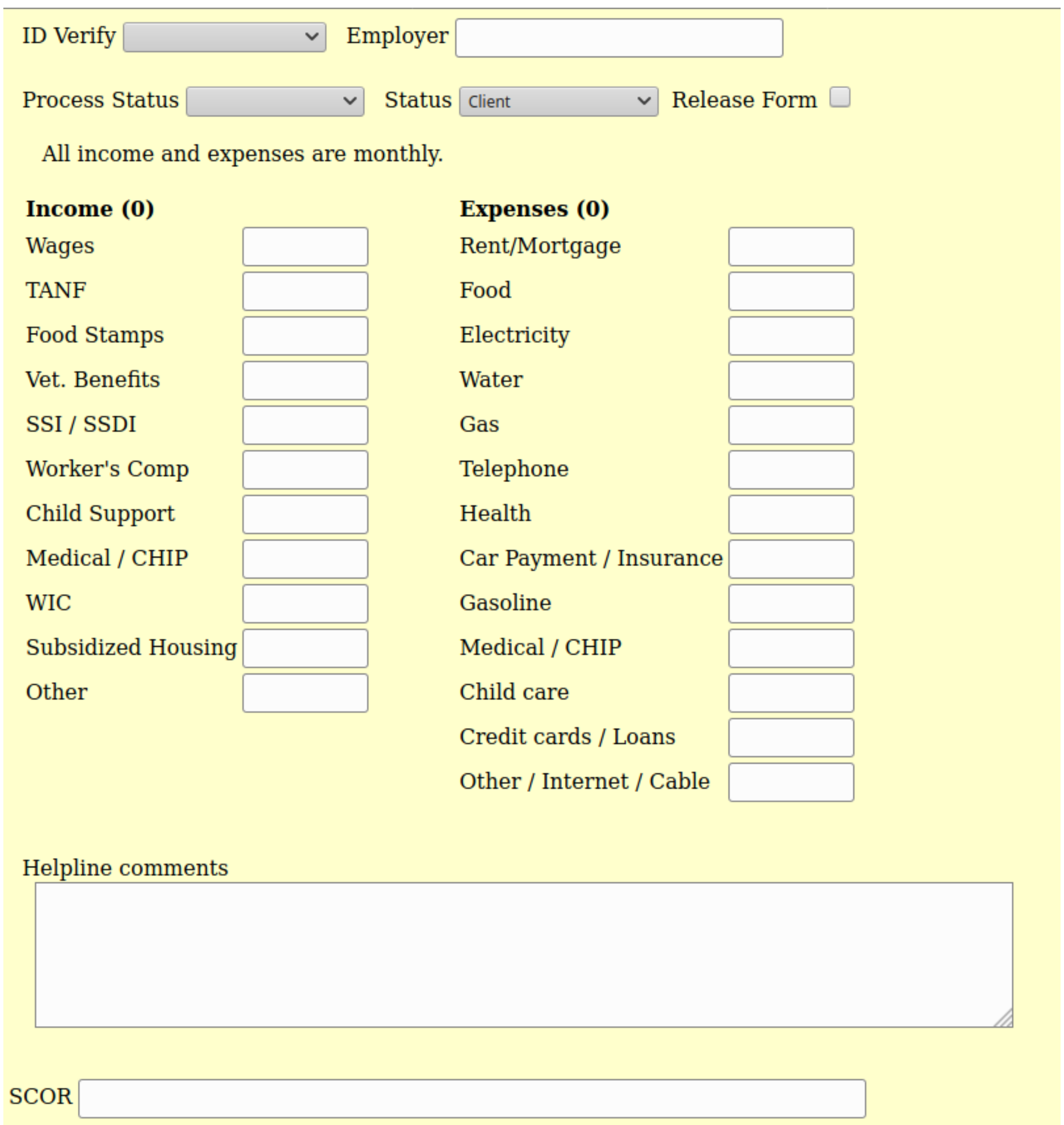
Referred by: Select who gave them our number to call.

Parish: if applicable(in case they are a registered parishioner of another Catholic Church)

Help Line Comments: Start with the day of the call, the reason they gave for the call and any other comments that you think will help the Lead Advocate.

**Updating Client Record** occurs anytime there is additional contact with the client by either the Help Line or Client Advocate and changes need to be made to the base record. As is typical with any database record it is required that the “Modify”Function be selected before making any changes and the “Save” function be selected when the changes have been entered in the record.

In addition to the previous screen shot, the following fields are displayed.



ID Verify | Employer

Process Status | Status: Client | Release Form

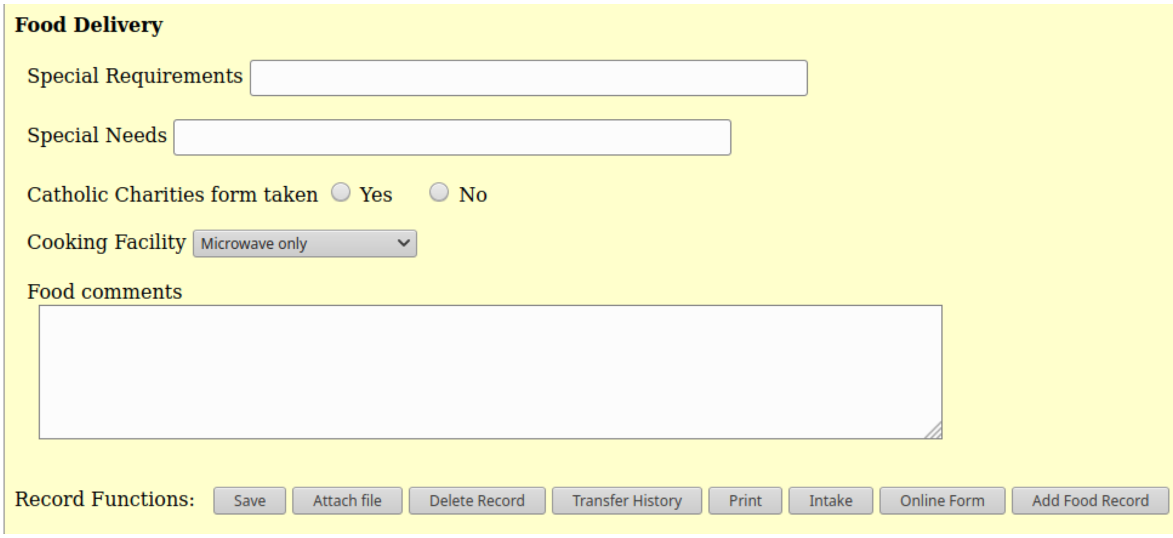
All income and expenses are monthly.

| Income (0) | | Expenses (0) | |
|---|---|---|---|
| Wages | | Rent/Mortgage | |
| TANF | | Food | |
| Food Stamps | | Electricity | |
| Vet. Benefits | | Water | |
| SSI / SSDI | | Gas | |
| Worker's Comp | | Telephone | |
| Child Support | | Health | |
| Medical / CHIP | | Car Payment / Insurance | |
| WIC | | Gasoline | |
| Subsidized Housing | | Medical / CHIP | |
| Other | | Child care | |
| | | Credit cards / Loans | |
| | | Other / Internet / Cable | |

Helpline comments

SCOR

The following screen shot shows the fields that are only displayed if the conference deals with food delivery.



**Creating/Updating History Records** is where the specifics of what the recommendation(s) are for each interaction with the client when an Advocate is asking for action usually involving the expenditure of conference funds.   The fields that are displayed are defined by each conference.  For example, a conference may decide they do not need the Organization help field.


**SVdP History Record for Help Please record 116**

Date: 04/18/2021 Advocate: New Member

Comments:

Need

Action

Recommend:

Helpers

Organization Help:

Amount of SVDP Assistance:

Payment Request

check #
check date:
Amount:

Method of approval (CM, ER, AD, CV):
Client account #
Payee information
Name:
address 1:
address 2:

Contact name:
Contact Phone #:
Special payment instructions:

The payment request field is defined by the conference and can contain the information for two or more payments.  It is a text field, so the information can be copied and pasted by an advocate for additional payment requests.

All relevant fields must be updated including the details for each payment request so that the Treasurer can effectively make all payments that have been approved.  The Treasurer will update the top part (check # check date and amount).

04/23/2021