

# Data Base User Guide

## Home Visit/Pantry/Secretary/Treasurer

(6-7-2016)

### ACCESSING WEBSITE/ESTABLISHING PASSWORD

- 1) <http://parishplus.com/>
- 2) Click on : SVdP web page - St. Thomas Aquinas [Click here](#)
- 3) Click on **SVDP Data Base Member**
- 4) Establish your own User Name
- 5) Password is the same for all users: "STA\_Mem+"

### ACCESSING DATA BASE at STA DURING SVDP MEETINGS

Wi-Fi "Rectory Guest" with pass word "stthomas"

### WHAT IS THE "RECORD NUMBER?"

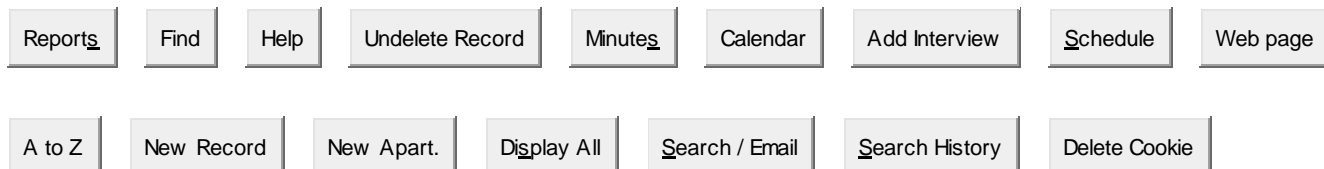
*There is ONE MASTER RECORD for each individual.* This is the number to be used for each individual regardless of how many cases that person has had. The **MASTER "RECORD"** is located above the name of the client on the main page of the client record. **The "Record ID" (which is really a history record)** is created every time a new case is established for the same individual. Using the correct MASTER RECORD number for all identification/ documentation/dollars paid for the individual ensures all history is captured under his name and **RECORD**.

### FINDING A RECORD

Go to the Main Menu and select "Find"

#### St. Thomas Aquinas SVdP Database

Select first letter of last name or click on a button.



Enter one or more characters of the last name, or the Record number and click on the "Find" button.

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If only one record is found, that record is displayed.

Last Name:  Case Number:  Record number:

find

If there are multiple records with the same last name a drop box will appear. Select the appropriate Record by clicking on the down arrow and then click on "Select" when you find the correct first name.

Name:

Select the desired record, the Select button.

Select

### DEFINITION of FIELDS on MAIN PAGE – RECORD

**ASTERISK\***: Denotes required field. If left blank you will get an error message.

Most Fields are self-explanatory. Below are definitions of all fields

**Home Visits:** (Optional) if the Advocate wants to denote the number of home visits made for the specific situation this can be populated.

**PROCESS:** Drop box. This is the "status" of the case and will be changed throughout the life of the specific case. Most of the categories are self-explanatory. Definitions below:

- **Approved not paid:** Approved at the meeting but check not mailed. This status will be assigned by the secretary or Hotline Operator at the meeting once the case is approved. The final status of "done" is updated by the Treasurer when the check is mailed.
- **Assigned:** Assigned by Hotline Operator to Home Visit Advocate but not presented to the meeting yet.
- **Cancelled:** Use for 1) "Closed till calls back"; if the individual cancels the request; if the individual fails to comply with providing the additional information needed to proceed with the case, etc.
- **Declined:** The case was not approved either by the prior or current Home Visit Advocate's recommendation or by vote at the meeting.

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- **Left Message:** (Optional) Message has been left for individual to call back with more information, etc.
- **Referred:** Caller was referred to another Parish or another Agency. (If referred to another Parish, you can identify that Parish in the drop down box in the Parish Box.) This is typically populated by the Hotline Operator
- **On Hold:** Case is pended for any number of reasons. The details related to the hold should be populated in the **COMMENTS in the “Add History” or “Modify Record”** identified below.
- **Scheduled:** (Optional) May be populated by the Home Visit Advocate, if desired, when the visit is scheduled but has not occurred.
- **Visited:** (Optional) May be populated by the Home Visit Advocate when Home Visit has been made but not yet presented at a meeting.
- **Needs Review:** The Advocate needs assistance or further discussion with others before making a recommendation. (Complicated situations)
- **Done:** Case is closed because it is completed. This field can be populated by the Treasurer or the Hotline Operator. *(This term is not to be used for “closed until caller calls back” or because caller did not provide requested information, etc. Those situations are now termed “Cancelled”)*

**Language Spoken:** Spanish; English or “Other”. Other should be documented in the Hotline Comments on the Main Page.

**Advocate:** To be populated by Hotline Operator for the Advocate assigned the case. The Advocate’s partner or “second” should be added to this box by the assigned Advocate.

**Hotline Operator:** Automatically assigned by the system

**Health:** If there are any specific health issues that are relevant to the situation, this should be populated by either the Hotline Operator or the Home Visit Advocate.

**“ETHNICITY” Box:** Populated by the Home Visit Advocate after the visit is made. This is important because the Council must enter this data on grant requests and the data is requested by Catholic Charities for the food program.

**Address:** Street Address

**“Status” Box:**

- “Client” is typically selected.
- Donation call for furniture, etc.: mark as “Resource.”
- Persons flagged for No Further Assistance will be flagged as “Alert” with appropriate comments documented on the Main Page “Comments” Box.

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**City/Zip:** City & Zip Code

**# Children:** Number of children living in the household

**Ages:** Ages of all the children in the household (even if they are adults)

**Total in Household:** Total in Household – related or non-related. Initially populated by the Hotline Operator. Home Visit Advocate should verify at the visit. ***This field is extremely important because it is required for our annual reporting.***

**Phone:** Phone numbers where individual can be contacted

**DOB:** DOB of the caller. This ***must*** be **mm/dd/yyyy** format. The program will calculate the age when “Save” is selected from the Record Functions Menu. This will be entered by the Hotline Operator but should be verified on the home visit.

**“SPOUSE”:** Use this field to populate any other adult in the home (roommate, parent, or Spouse’s/partner’s name.) Use full first and last name. This will ensure there is only **one record per household**.

**ID Verify:** If the Home Visit Advocate verifies the person’s identification through any of the means in the drop box, this should be documented.

**Employer:** If the caller or spouse is employed, this will be populated by the Hotline Operator or the Home Visit Advocate.

**Occupation:** What the caller or Spouse does at the employment establishment.

**“APARTMENT”:** Leave as “None” for now. A list of apt complex names/identifiers is under development to create a drop down box. This will ensure only 1 identifier is used for each apartment complex. The apartment office phone will be auto populated when the down box is selected.

**Bedrooms:** Check the appropriate drop down box

**Referred by:** Check the drop down box that applies (typically checked by the Hotline Operator.)

**Parish:** This drop down box will be used to denote where Catholic callers are members. Or, if the caller is referred, what Parish the caller is referred to if the caller is out of the STA service area.

**“HOTLINE COMMENTS”:** ***On the Main Page***, this box becomes a permanent part of the identifying information for this individual/household. It should be used ***ONLY for details that remain***

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**constant about that person/household** and are important when evaluating each situation. For example: “home shut-in”; “disabled”; “amputee”; “mental health issues”; etc.

*(While we work on cleaning up the transition of the data; this box should be reviewed by each Hotline Operator/Home Visit Advocate. The information may need to be deleted or updated to fit the definition above. This will be an ongoing process for a while, as much information transitioned to this field is not appropriate. Move the phone # and other demographic information to the appropriate boxes of the Main Page **(RECORD)** if it is not already there. Other pertinent data may need to be copied to the most recent closed history record.)*

**MAGI TREE/THANKSGIVING CANDIDATE (Y/N):** To be populated by the Home Visit Advocate. This will allow us to run a report during the holiday season for all persons nominated for these programs.

**C.C. YOUNG MEALS for SENIORS PARTICIPANT (Y/N):** To be populated by appropriate person in charge of this program. (Currently this is Amy Gluf.)

**ALL INCOME and EXPENSES MONTHLY:** This may be partially populated by the Hotline Operator. Income and expenses must be verified and completed at the home visit and documented by the Home Visit Advocate. When the record is saved, the program will total all income and expenses.

### **POPULATING DOCUMENT – TIPS**

**Making Edits on Existing Records:** When you edit/modify an old record, it will flag the record as active and show up on the Report “Clients Being Helped.” You must go back and repopulate the “Process” as “done” so it does not show as an open case in that report.

### **POPULATING THE ADD or MODIFY HISTORY RECORD**

**DATE:** Auto generated

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**NEED\*:** Required Field. Basic Information about what caller is requesting. Attempt to stay with the definitions already approved in the Hotline Procedures if possible. (Chart below) (Initially will be populated by the Hotline Operator. Home Visit Advocate should amend as appropriate after the home visit.)

**Needs Categories**

<b>Need categories for STA SVdP</b>	
<b>Need</b>	<b>Definition</b>
Auto	car payment, auto repair, all things auto
Clothing	all clothing includes shoes, coats, socks, underwear, uniforms
Diapers	diapers, wipes
Donation	all information relating to cash or furniture donations
Food	food with or without transportation be sure to add transportation info to the notes
Furniture	all furniture needs be sure to tell caller we do not have furniture but we will keep info in case something comes up
Medical	prescriptions, Dr bills, all things medical
Rent	all housing, rent, mortgage, hotel
Toiletries	all personal and household cleaners
Transportation	bus passes, bus ticket, all transportation
Status	caller looking for update on case or wanting to pass info to Vincentian
Utilities	electric, phone, gas, water, all utilities
Other	everything that doesn't fit in another category, explain in notes

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**LIST OF HELPERS:** 1) Names of any prior Advocates who had experience with the caller; 2) Name of current Advocate assigned to case; 3) Name of the 2<sup>nd</sup> Advocate who made the home visit. Hotline Operator can enter some of this data. The Home Visit Advocate taking the case will update this field if more Advocates are brought into the case.

**AMOUNT:** Amount of request. This field will be entered by the Hotline Operator during the initial call. It may be changed by the Home Visit Advocate after the visit. It may not be the same as the "Amount Paid" once the case is reviewed and voted upon.

**ACTION/OTHER HELP:** This field can be updated by the Advocate doing the home visit if additional needs are discovered during that visit and presented at the meeting.

**ADVOCATE RECOMMENDATION\*:** Required field. Hotline Operator will populate as "pending" until the case is assigned. The Home Visit Advocate taking the case will update this field with the recommendation before the meeting. If the case is denied at the meeting, the Hotline Operator or Secretary will update the "Process" with the final status of "Denied."

**PAYMENT REQUEST:** The Home Visit Advocate should update ALL of the payee information *except* check number and check date before the meeting. The Treasurer will enter the check number and check date when the check is cut and mailed.

**OTHER ORGANIZATION HELP:** List any other organization involved in the case and participating in payment for the individual's request. Examples: Twinning with Holy Trinity for \$X; Networks paying \$, etc. May be populated by the Hotline Operator or Home Visit Advocate.

**COMMENTS in the "Add History" or "Modify Record":** This box occurs at the *bottom of the page*. Enter any & all information *specific to this case* and for history. This box will be edited and updated by the Home Visit Advocate after the visit. Old information can be deleted and new information added to update "Comments" specific to the findings from the home visit. The latest entered information will remain in the history of that specific Record ID.

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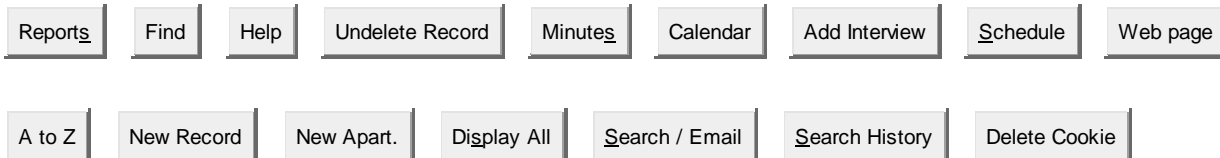
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### UPDATING RECORDS/STATUS FROM MEETINGS

*(This task is the responsibility of the Hotline Operators, Treasurer and Secretary)*

Go to "Find" on the main menu



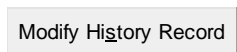
Enter Record # or Last Name then Select "Find"

Last Name:  Case Number:  Record number:

- Scroll down in "History" to the history record containing the request for your case (food, rent, utilities, etc.).

(Make sure you bypass any history Record identified as "Message Only"; or with a need of "status" or "update". These history Records were generated by the Hotline Operator for individuals calling for a status or to get a message to the Home Visit Advocate. )

- Select "Modify Record"
- Advocate Recommendation should already be updated by the Home Visit Advocate before the meeting.
- The Payment Request Amount Approved at the meeting will be updated by the Secretary or Hotline operator. The Treasurer will rely on this field when the check is cut for payment.
- Update Comments as applicable
- Click on "Modify History"



- This brings you back to the main page
- Change Process (Status) if Applicable.
  - The appropriate status populated at the meetings are below:
    - Approved Not Paid – entered by Secretary or Hotline Operator. (If triaged via email – Home Visit Advocate will populate.)
    - Declined
      - Secretary or Hotline Operator will populate if presented at the meeting and denied based on vote.

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- On Hold – populated by the Hotline Operator or Secretary
- Done: Populated by the Treasurer after the check is mailed

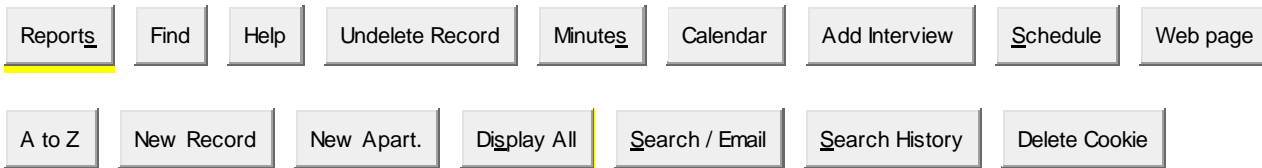
- Click on “Save” in the Record Function

Record Functions 

### HOW TO COPY/FIND/PRINT/”SAVE AS”

Function	Action
<b>COPY</b>	<b>Control “C”</b>
<b>PRINT</b>	<b>Control “P”</b>
<b>SAVE</b>	<b>Control “S”</b>
<b>FIND</b>	<b>Control “F”</b>

### OTHER USEFUL FUNCTIONS from Menu Bar



**Reports:** This will provide a report of all *open* records with the following data elements:

- Record Number
- Name
- Assigned Advocate
- Process/Status
- Advocate Recommendation
- Comments from the most current History Record

From this report, you can:

- Click on the name or Record Number to go immediately into the Record to update anything on the Main Page and/or history notes.

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**Display All:** Will display every record in the system alphabetically. This page is where you can use the **“Find”** function (Control “F”) to locate a record searching by 1) Name; 2) Phone Number; 3) Address, etc.

### Vincentian Personal Records - **IMPORTANT**

Each Vincentian Volunteer has a personal record in the system. Every Volunteer will be responsible for documenting hours and mileage within his own Volunteer Record. ***This is critical for annual reporting to the Council.***

1. Search on your name to find your record
  - a. Find “Volunteer Records” at the bottom of your record and select “Add Vol Record”

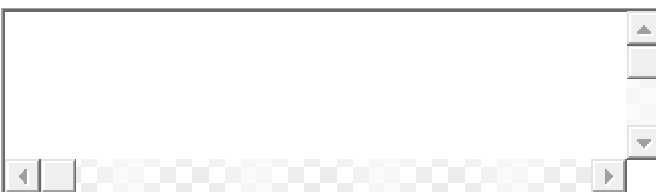
Volunteer Records 

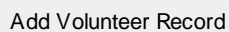
2. The date will pop up. Enter your hours and mileage for that case/pantry activity/hotline week/etc.
3. Make any specific notes you want captured for that activity.
4. Click on “Add Vol Record” to save the information

Date  

Hours

Miles

Activity 



5. This data is required on the annual reports provided by our Conference president to the Council. It is very important. DO NOT skip this very important step.
6. The program will calculate all the hours and the mileage that needs to be reported by the STA SVdP President to the Council.

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### RESOURCES FOR QUESTIONS/ISSUES/ADDITIONAL INSTRUCTIONS

Pat Salvaggio/214-549-3535/ [belmont5701@sbcglobal.net](mailto:belmont5701@sbcglobal.net)

Gayle Linville/214-566-2506/ [gclinville@gmail.com](mailto:gclinville@gmail.com)