Data Base User Guide
Hotline Operators

(6-8-2016)

ACCESSING WEBSITE/ESTABLISHING PASSWORD

1) **http://parishplus.com/**
2) Select: 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**. Do NOT use "Record ID"** which 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 will allow all history to be captured under his name and RECORD.

The MASTER RECORD number is auto generated by the system when a new individual's record is established. The numbering system for Master Records may not appear "logical." But, it does ensure one unique record for every individual.

PROCESS FOR DETERMINING EXISTING OR NEW INDIVIDUAL

When a call comes in – verify the spelling of the caller's name and then search in the data base as noted below:

Select: SVdP web page - St. Thomas Aquinas Click here
Select:

SVDP database - member SVDP database for members

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Select "FIND" from the Menu Bar

Reports | Find | Help | Undelete Record | Minutes | Calendar | Add Interview | Schedule | Web page

A to Z | New Record | New Apart. | Display All | Search / Email | Search History | Delete Cookie

Enter Last Name and select "FIND"

Last Name: Case Number: Record number:
find

Use Scroll Button to search for the specific caller. If name is found enter "Select".

Name: Smith, Alan - rec 2740

Select the desired record, then the Select button.

Select

Scroll through the individual's history to learn of prior payments; prior home visit Advocates, etc.

EXITING HISTORY

If the individual has history with STA SVdP; this will bring you to the Master RECORD or Main Page for all the demographics and history for that individual.

Verify that the address; phone number; DOB on the Master Record are still correct.
DOB must be populated with DD/MM/YYYY. (An error message appears if you do not use YYYY.) The system will auto calculate the age.

- Make any changes required
- Verify the Language is correct (Most records defaulted to English when data was transferred.)
- **IMPORTANT**: When entering any new data you **MUST SAVE** all changes in the RECORD FUNCTIONS before adding or modifying any history. Failure to click SAVE before leaving this page to Add or Modifying history will result in those changes being lost.

Record Functions Save | Add interview | Attach file | Delete Record | Prev Rec. | Next Rec.

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If you are working on a current case to add notes or status, etc. you will select "***Modify Record***" in the appropriate Record ID, then enter the information in the appropriate cell on that page.

If this is a new call and new situation for an existing individual, you will select ***"Add History."*** The system will provide a new Record ID Number and that page will be blank until you enter information.

Scroll Down the main page to the history and then select the "Add History" or "Modify History" as appropriate.

History Add History

Record ID	4977 Modify Record

NO HISTORY – New to STA SVdP

If no name is found, select **"New Record"** from the Menu Bar.

Reports | Find | Help | Undelete Record | Minutes | Calendar | Add Interview | Schedule | Web page

A to Z | New Record | New Apart. | Display All | Search / Email | Search History | Delete Cookie

Then select "Add Record" from the Menu Bar

Reports | Find | Help | Undelete Record | Minutes | Calendar | Add Interview | Schedule | Web page

A to Z | New Record | New Apart. | Display All | Search / Email | Search History | Delete Cookie

Add Record

NOTE: **First enter *just the name* and select "add record"** to ensure there is not a duplicate Record for that person, then enter the rest of the data. If that name *already exists,* the record will pop up on your screen. (This step avoids entering all the individual's data and *then* finding out that person is already in the system.)

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If this is a new person but another person's record comes up with the *same* name, (Maria Gonzales, for example), get the middle name or append a "1" to the name to make it unique. Checking the address and phone *may* help you verify if there are 2 records for the same person, or if there are 2 unique persons with the same name. Many historical Records did not transition with a DOB.

When the main sheet is completed you will be prompted to **"Add Record."** If all required data fields are not correct, the system will not allow you to continue. You will be alerted by an "error message" with information about which fields are incorrect or missing. (**ADVOCATE RECOMMENTATION*: Remember, this is a required field. Hotline Operator will populate as "pending" until the case is assigned.** You will get an error message if you try to close the record without populating this field.)

The system generates a MASTER RECORD number when you select "SAVE" at the end of all the data entry. ***If you do not "SAVE"*** when you leave this page, all the *entered data will be lost*. Even toggling back and forth between Main Page and Modifying Record you must SAVE on the Main Page or any new entry will be lost.

DEFINITION of FIELDs on MAIN PAGE – RECORD

<u>**ASTERISK*:**</u> 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.

- **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 polluted by either the Hotline Operator or the Home Visit Advocate.

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"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.

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.

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"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 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

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DATE: Auto generated

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)

Note: *Additional data fields are currently requested to enable this tool to be used to calculate data for the Annual Report to Council. This will take time. Adjustments and best judgements are needed until then. This is a "living" document until fully fine-tuned for every conference needs. Updates will be circulated as changes are being made to the data fields.*

Needs Categories

Need categories for STA SVdP Hotline 2015	
Need	**Definition**
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

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Need	Definition
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

LIST OF HELPERS: 1) Names of any prior Advocates who could be consulted on the case based on their experience with the caller; 2) Name of current Advocate assigned to case; 3) Name of the 2nd Advocate who made the home visit. Hotline can enter some of this data. The Advocate taking the case will be responsible for updating this field if more agencies or 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 or may not be the same as the "Amount Paid" once the case is reviewed and voted upon.

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

ADVOCATE RECOMMENTATION*: 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 before the meeting. The Treasurer will enter the check number and check date when the check is cut and mailed.

- During this transition, Hotline Operator will enter amount approved after it is approved at the meeting. This will stop when the home visit Advocates and Treasurer are using the system.

OTHER ORGANIZATION HELP: List any other organization who is involved in the case and participating in payment for the individual's request. Examples: Twinning with Holy Trinity for $250; Networks paying $100, etc.

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.

RUNNING REPORTS FOR OPEN RECORDS (To be Discussed/ Assigned at Meetings)

Use backup arrow to go back to main menu and select "Reports"

Reports | Find | Help | Undelete Record | Minutes | Calendar | Add Interview | Schedule | Web page | New Record

New Apart. | Display All | Search / Email | Search History | A to Z | Delete Cookie

Then Select

Clients Being Helped

This will provide a report with:

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

From this report, the Hotline Operator can:

- Print the Record for all cases needing to be assigned at meeting
- Know which cases may be presented at the meeting
- Go immediately into the Record to update "Process" and any other history notes at the meeting

UPDATING RECORDS/STATUS FROM MEETINGS

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

Go to "Find" on the main menu

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Reports | Find | Help | Undelete Record | Minutes | Calendar | Add Interview | Schedule | Web page

A to Z | New Record | New Apart. | Display All | Search / Email | Search History | Delete Cookie

Enter Record # or Last Name then Select "Find"

Last Name: Case Number: Record number:

find

- Scroll down in "History" to the most current history record with a status of pending.

(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 individuals calling in 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. (If working with an Advocate who is not yet trained, the Hotline Operator will update this information.)
- 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 if applicable
- Click on "Modify History"

Modify History Record

- This brings you 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.
        - 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
COPY	**Control “C”**
PRINT	**Control “P”**
SAVE	**Control “S”**
FIND	**Control “F”**

OTHER USEFUL FUNCTIONS from Menu Bar

Reports | Find | Help | Undelete Record | Minutes | Calendar | Add Interview | Schedule | Web page

A to Z | New Record | New Apart. | Display All | Search / Email | Search History | Delete Cookie

Record Functions Save | Add interview | Attach file | Delete Record | Transfer History | Prev Rec. | Next Rec.

Delete Record: Will delete entire record if you accidentally created a duplicate or need to totally erase for any reason.

Undelete Record: Will restore the record you just deleted

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 Name; Phone Number; Address, etc. as was done on the excel spreadsheet Case Log.

Vincentian Personal Records - *IMPORTANT*

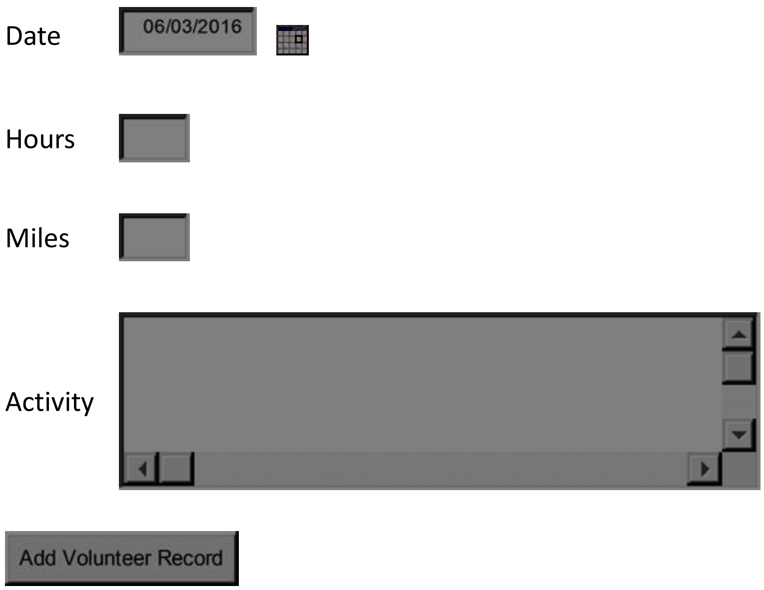
Each Vincentian Volunteer has a personal record in the system. Every Volunteer will be responsible for documenting hours and mileage within his own Volunteer Record. ***This is critical for annual reporting to the Council.***

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 Add Vol. Record

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



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.

RESOURCES FOR QUESTIONS/ISSUES/ADDITIONAL INSTRUCTIONS

Pat Salvaggio/214-549-3535/ belmont5701@sbcglobal.net

Gayle Linville/214-566-2506/ gclinville@gmail.com