

## User Instructions for Meet The Need's Shared Case Management & Scheduling Features

All features are located on your dashboard under your  
**Shared Case Management Module > Add/View Families**

The screenshot shows the 'Sample Ministry' dashboard. At the top right, it says 'John Smith Sample Ministry'. Below the header, there are navigation links: 'My Account | Settings | Training | Create Template'. A dropdown menu for 'Select Other Organization' and a 'Dashboard' home icon are also present. The main content area is divided into two columns. The left column has a 'Volunteer / Goods Management' section with buttons for 'Post Needs for Volunteers / Goods' and 'View Volunteer Needs / Reports'. The right column has a 'Shared Case Management' section with buttons for 'Add / View Families', 'Schedule Families', and 'View Family Needs / Reports'. The 'Add / View Families' button is circled in red. Below these sections is an 'Events' section with buttons for 'Create Event' and 'View Events & Reports'.

### Search/Enter a Family

On the next screen you will see a list of currently active families your organization has already entered. You can search the network for a new family and if the family is not listed you can add that family. Click "Search Network/Add Family"

The screenshot shows the 'Our Local Families' page. At the top, there are tabs for 'Families', 'Scheduled Visit Management', 'Item Report', and 'Family Report'. Below the tabs is a search bar with 'Search Our Families' and a circled 'Search Network / Add Family' button. To the right of the search bar are filters for 'Range: All' and 'Visibility: Active'. A note says 'To view and activate newly registered Families select Inactive'. Below the search bar is a table with the following data:

Name	Address	Open Needs	Visit Summary	Status	Action
anna Smith	tampa, Florida 33556	No open needs.	No recorded visits.	Active - Click to Deactivate	Details
James Smith	Tampa, Florida 12345	No open needs.	No recorded visits.	Active - Click to Deactivate	Details
jack johnson		No open needs.	No recorded visits.	Active - Click to Deactivate	Details

Enter details of the family and click “Search” You can search and enter more fields in the MTN database to better find and follow up with the specific family you are helping.

**Add Family - Search Recipients**

**First Initial:**

**Last Name:**

**Address:**

**Country: \***

**Zip: \***

**Phone: \***  ex: xxx-xxx-xxxx

**Driver's License:**

**Social Security Number:**

You can then see if there is a match. You may click “Details” next to the person for more information about needs posted for that family and any previous visits. If no match click “Skip and Add New Family”. Enter details for the family and click “Insert”.

## Post Needs, Record Visits, Schedule Future Visits

When you enter a family, you are taken to the following screen to quickly be able to enter a need, record a current visit, and schedule a future visit for that family.

**Post Need or Record/Schedule a Visit**

**Search Offers & Post Needs**

Before adding a need for someone, you must see if there are any offers available. If not, then you can post a need. You must fill out all information on the form below down to the Sub-Category level (other than "All") in order to post a need for this recipient.

**I Want to Help a:**

**By Providing:**

**Category:**

**Sub-Category:**

**Country:**

**Zip Code:**  **Distance:**

**Add or Schedule Visit**

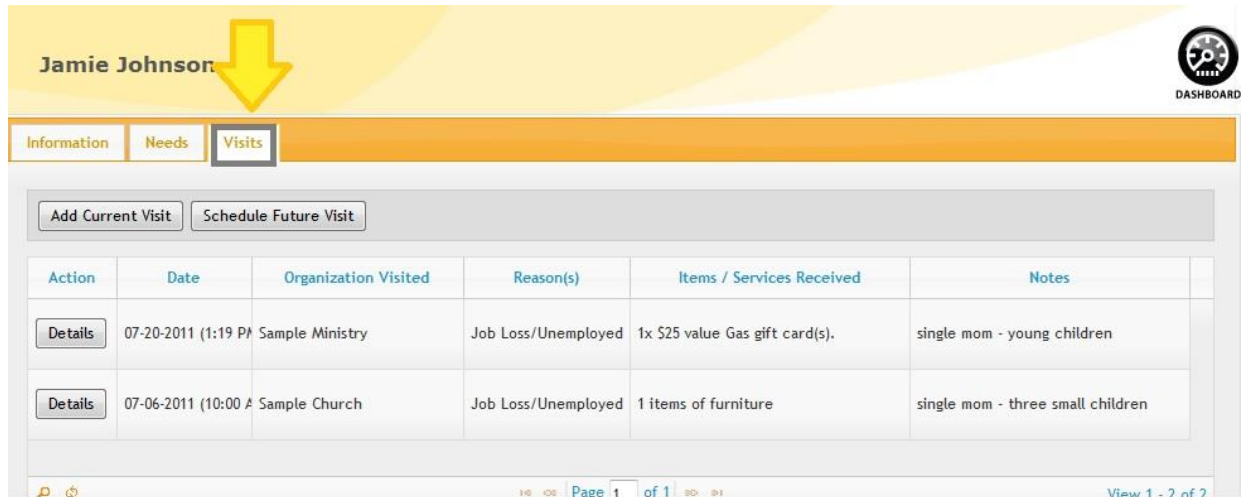
If you are providing services or other support for this family, record the visit and the nature of the assistance provided by clicking "Add Current Visit". You may also schedule the family for a future visit to receive assistance by clicking "Schedule Future Visit".

*View and record current family visits*

*Schedule a future family visit*

## See Visits at Other Organizations

If a family is in the system you can search to see if, when, and where a family has received help from other area churches and ministries. The organization that entered the family has full access to see and edit all the family info. Other organizations only are able to view limited information to make an informed decision:



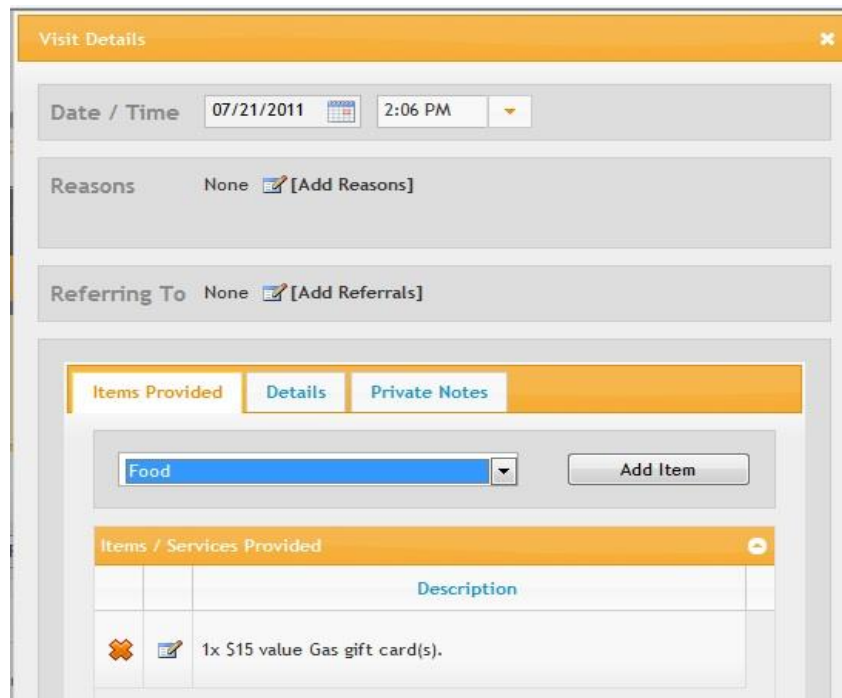
The screenshot shows a user interface for a family named Jamie Johnson. A yellow arrow points to the name. The 'Visits' tab is selected, showing two buttons: 'Add Current Visit' and 'Schedule Future Visit'. Below is a table of visits:

Action	Date	Organization Visited	Reason(s)	Items / Services Received	Notes
<a href="#">Details</a>	07-20-2011 (1:19 PM)	Sample Ministry	Job Loss/Unemployed	1x \$25 value Gas gift card(s).	single mom - young children
<a href="#">Details</a>	07-06-2011 (10:00 AM)	Sample Church	Job Loss/Unemployed	1 items of furniture	single mom - three small children

At the bottom, it shows 'Page 1 of 1' and 'View 1 - 2 of 2'.

## Record a Visit and Items/Services Given

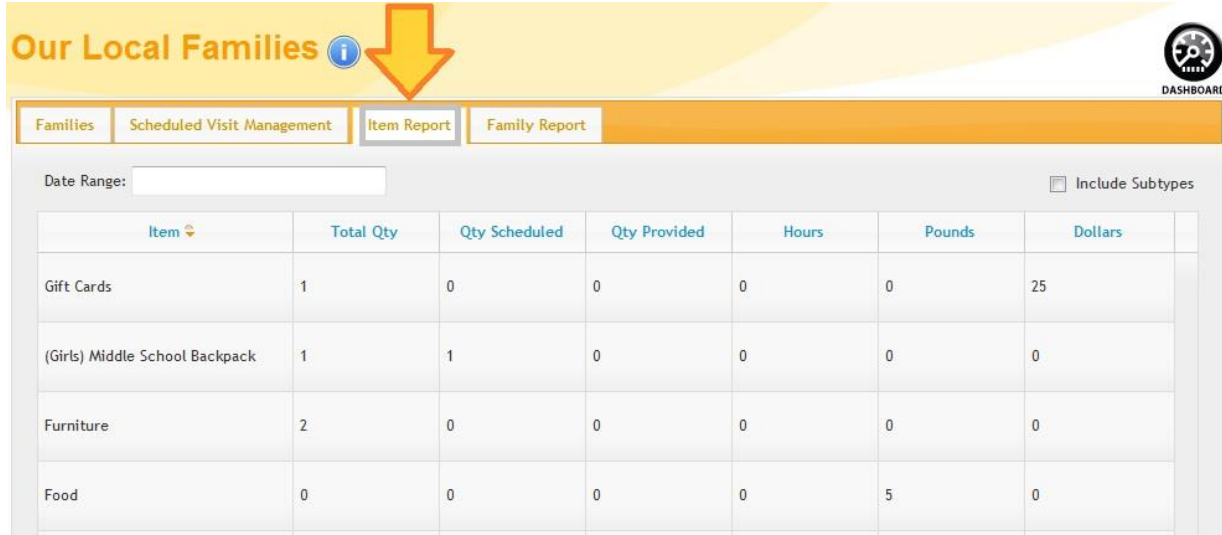
To track what *your* organization or another organization gives to a particular family add a Current Visit. You can enter and report the details of the visit you had, such as item given, quantity (lbs, #, \$), who they met with, notes, etc.




The screenshot shows the 'Visit Details' form. It includes fields for 'Date / Time' (07/21/2011, 2:06 PM), 'Reasons' (None), and 'Referring To' (None). Below these are tabs for 'Items Provided', 'Details', and 'Private Notes'. Under 'Items Provided', there is a dropdown menu with 'Food' selected and an 'Add Item' button. Below that is a table for 'Items / Services Provided' with a 'Description' column. One item is listed: '1x \$15 value Gas gift card(s)'.

## Run Items and Family Reports

Read and run reports that total the types of items/services given by your organization and type of families seen for a specific date range. Click in the “Date Range” box for a drop down selection of date ranges.



**Our Local Families** i  DASHBOARD

**Families** | **Scheduled Visit Management** | **Item Report** | **Family Report**

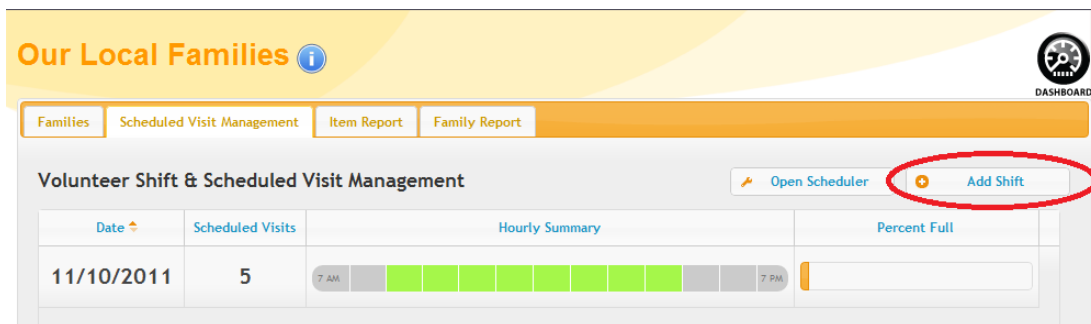
Date Range:   Include Subtypes


Item	Total Qty	Qty Scheduled	Qty Provided	Hours	Pounds	Dollars
Gift Cards	1	0	0	0	0	25
(Girls) Middle School Backpack	1	1	0	0	0	0
Furniture	2	0	0	0	0	0
Food	0	0	0	0	5	0

## Schedule Future Visits

For events or appointments where a family in need will be coming back to receive a good/service (backpacks, food, holiday toys, etc.), you can schedule a future day/time appointment for them to return.

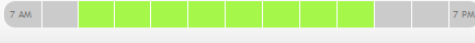
Click the “Scheduled Visit Management” tab. Select the date or click “Add Shift” to add the day and time of a different future visit.



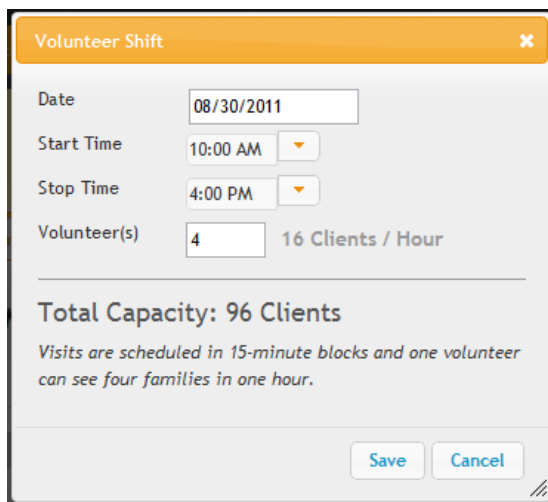
**Our Local Families** i  DASHBOARD

**Families** | **Scheduled Visit Management** | **Item Report** | **Family Report**

**Volunteer Shift & Scheduled Visit Management**

Date	Scheduled Visits	Hourly Summary	Percent Full
11/10/2011	5		<input type="text"/>

When you click “Add Shift” you will select a day and time frame and the number of volunteers/clients you want to schedule on that day. Click “Save”.



Volunteer Shift

Date: 08/30/2011

Start Time: 10:00 AM

Stop Time: 4:00 PM

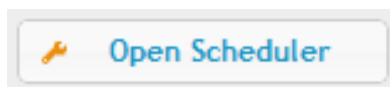
Volunteer(s): 4 16 Clients / Hour

**Total Capacity: 96 Clients**

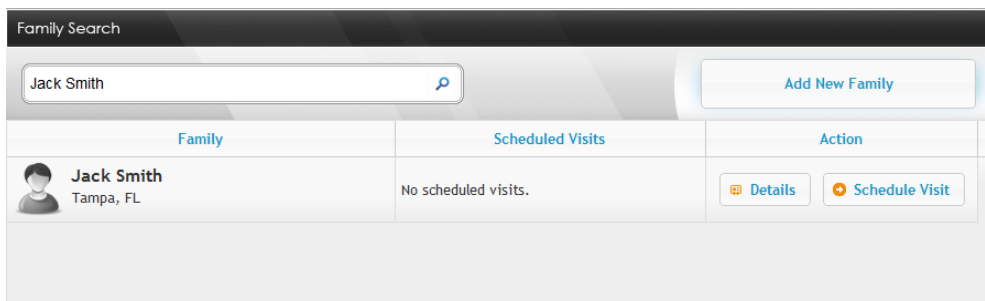
*Visits are scheduled in 15-minute blocks and one volunteer can see four families in one hour.*


Save Cancel

You will then need to click on the “Open Scheduler” button:



In the search box, you can type a name, number, social etc. to search for a family. If you find the family whose information you are entering or who you are meeting with, you can click on “Details” for more information or “Schedule Visit”.



Family	Scheduled Visits	Action
 <b>Jack Smith</b> Tampa, FL	No scheduled visits.	<a href="#">Details</a> <a href="#">Schedule Visit</a>

If the family does not appear in the search, click “Add New Family” and:

- Enter their details for that family
- Enter information for any additional family/household members
- Click “Add Family”, then “Schedule New Visit”

You can see the available days and times available. Click "Select" next to the appropriate **day**.

Family Search Available Days

Family  
Jamie Johnson  
[\(Change\)](#)

### Available Dates

Date	Percent Full	Action
07/21/2011		<a href="#">Select</a>
07/22/2011		<a href="#">Select</a>
07/23/2011		<a href="#">Select</a>

Available Days and Times for Future Appointments

9 AM  
15 Available (6% Full)

The click "Select" next to the available time slot:

Family Search Available Days Available Hours

Family  
Adam Brown  
[\(Change\)](#)

Date  
11/10/2011  
[\(Change\)](#)

### Available Times

Time Slot	Percent Full	Action
9:00 AM - 9:15 AM		<a href="#">Select</a>
9:15 AM - 9:30 AM		<a href="#">Select</a>
9:30 AM - 9:45 AM		<a href="#">Select</a>
9:45 AM - 10:00 AM		<a href="#">Select</a>
10:00 AM - 10:15 AM		<a href="#">Select</a>
10:15 AM - 10:30 AM		<a href="#">Select</a>
10:30 AM - 10:45 AM		<a href="#">Select</a>
10:45 AM - 11:00 AM		<a href="#">Select</a>
11:00 AM - 11:15 AM		<a href="#">Select</a>
11:15 AM - 11:30 AM		<a href="#">Select</a>

You can then select the item to be given in the future from the drop-down and click “Add Item” and any details/notes. Click “Book This Time”

Schedule Visit For Adam Brown

Date / Time 11/10/2011 10:30 AM

Reasons None [\[Add Reasons\]](#)

Referring To None [\[Add Referrals\]](#)

Items to Be Provided Details Private Notes

Please Select [Add Item](#)

Items / Services to Be Provided

	Description
1	(Boys) High School Backpack

Cancel **Book This Time**

## Print Confirmations /Check People in with Bar-codes

On the final screen, click “Print Confirmation” to print a bar coded confirmation for the family to take and bring back the day of their appointment. This is the family’s reminder of where and when to return and what items/services they will receive. This will also ensure an accurate record of what items/services were actually received the day of the appointment.

### Scheduled Visit Confirmation

Hi Adam, this is your confirmation card for your upcoming appointment. Please bring it with you on the day of your visit.



Primary Name

**Adam  
Brown**

Appointment Location

**Sample Church**  
123 Main Street  
new york, ny 12345

Appointment Time

11/10/2011  
**10:30 AM**

On the date the family returns for their appointment, go to [www.meettheneed.org/scheduler](http://www.meettheneed.org/scheduler), log-in, and scan the bar coded sheet (If using bar codes), which will automatically pull up the family's information and their scheduled visit(s). If the family forgot to bring or lost the bar coded sheet, search for them by name, SSN#, etc. using the Family Search box shown above. Then click "Check In" next to appropriate appointment and confirm the items they are receiving that day. If the family came at a different day or time, then you should also edit the date and time at the top of that Check In page:

The screenshot displays the 'Family Details' page for Adam Brown. At the top, there are navigation links for 'Family Search' and 'Family Details'. The user's name 'Adam Brown' and a profile icon are shown in the top right. The main content is divided into two sections: 'Visits' and 'Family Details'.

**Visits Section:**

Details	Action
11-10-2011 (11:00 AM) Sample Church <i>Scheduled</i>	<input checked="" type="checkbox"/> Check In Edit Cancel
11-10-2011 (10:30 AM) Sample Church <i>Scheduled</i>	<input checked="" type="checkbox"/> Check In Edit Cancel
11-10-2011 (9:15 AM) Sample Church <i>Scheduled</i>	<input checked="" type="checkbox"/> Check In Edit Cancel
11-10-2011 (9:00 AM) Sample Church <i>Scheduled</i>	<input checked="" type="checkbox"/> Check In Edit Cancel
09-01-2011 (12:17 PM) Sample Church <i>Scheduled</i>	<input checked="" type="checkbox"/> Check In Edit Cancel

At the bottom of the visits list, there is a pagination control: 'Page 1 of 1' and 'View 1 - 11 of 11'.

**Family Details Section:**

Gender: Male  
Address: 1122 Main Street  
City, State, Zip: Tampa, FL 12345  
Phone Number: 654-789-9451  
Date of Birth: 07/07/1977

Name	Relationship	Action
Eva Brown	Spouse	<input type="checkbox"/> Details
Cain Brown	Child	<input type="checkbox"/> Details
Abeline Brown	Child	<input type="checkbox"/> Details