

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

All features are located on your dashboard under
Our Local Families > Post Needs, Record Visits, and Schedule Future Visits

The screenshot shows the 'My Account' dashboard for 'Sample Church'. The 'Our Local Families' section is highlighted with a yellow arrow. The dashboard includes a navigation bar with 'View Another Organization's Dashboard' and 'Sample Ministry' dropdown, and a 'GO' button. The main content area is divided into several sections: 'Our Organization', 'Our Profile, Key Contacts & Web Site', 'Our Members', 'Our Teams', 'Needs and Commitment Activity', and 'Our Local Families'. The 'Our Local Families' section is highlighted with a yellow arrow and contains the following items:

- **Post Needs, Record Visits, and Schedule Future Visits(43)**
- Open & Partially Filled Needs (0)
- Filled Needs (1)
- Expired Needs (47)
- Pending Commitments by Individual (1)
- Completed Commitments by Individual (33)

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. The search bar at the top has 'Search Network / Add Family' highlighted with a red circle. The table below lists the following families:

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.

Search Offers

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:

Jamie Johnson  DASHBOARD

Information Needs **Visits**

[Add Current Visit](#) [Schedule Future Visit](#)

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

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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.

Visit Details


Date / Time: 07/21/2011 2:06 PM

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

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

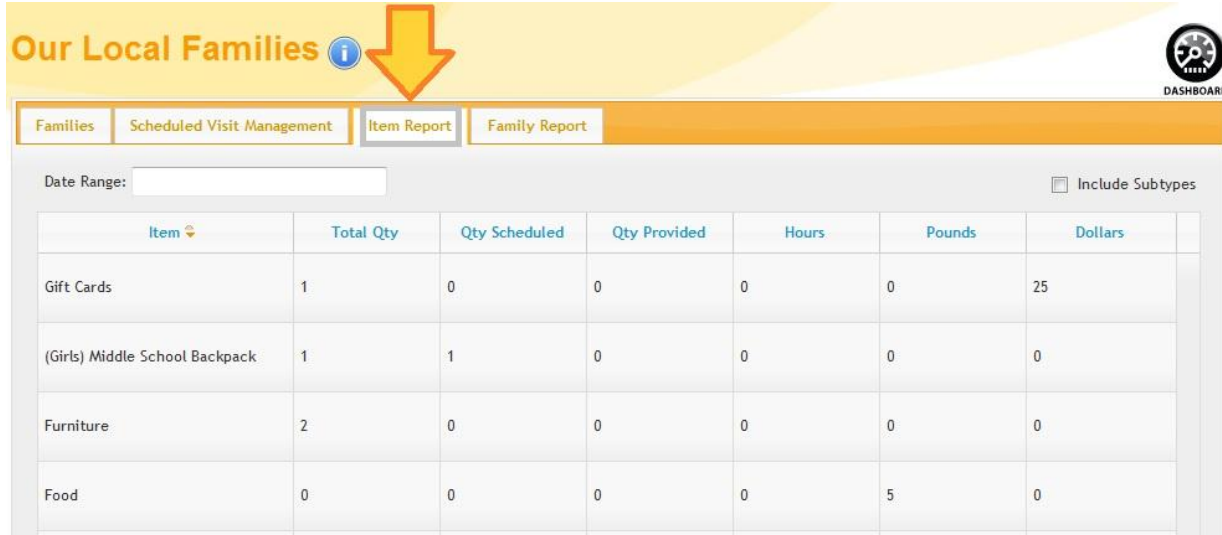
Items Provided [Details](#) [Private Notes](#)


Food [Add Item](#)

Items / Services Provided	
	Description
 Edit	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 1  DASHBOARD

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

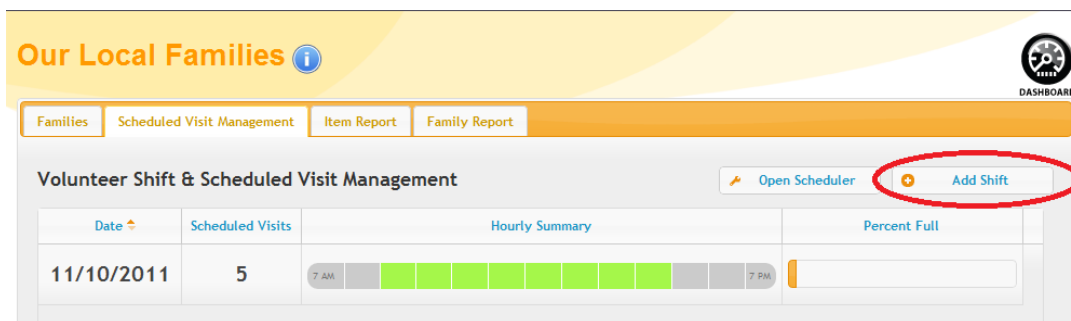
Date Range: Include Subtypes


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.

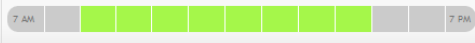
Click the “Scheduled Visit Management” tab. Select the date or click “Add Shift” to add the day and time of a different future visit.



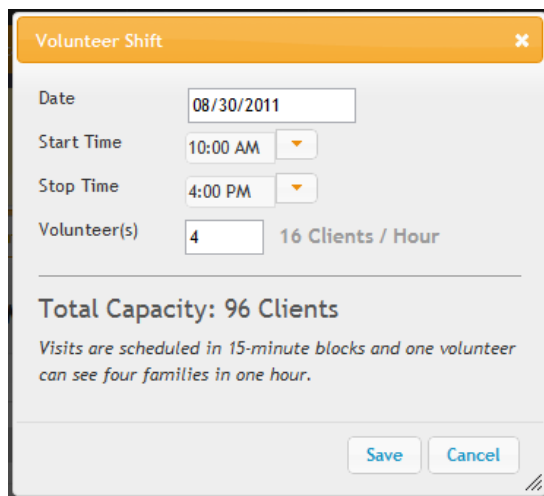
Our Local Families 1  DASHBOARD

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

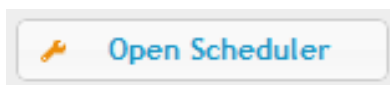
Volunteer(s): 4 16 Clients / Hour

Total Capacity: 96 Clients

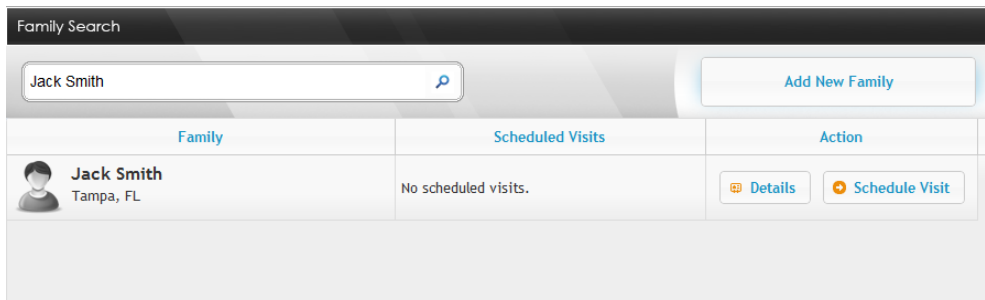
Visits are scheduled in 15-minute blocks and one volunteer can see four families in one hour.

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 Search

Jack Smith

Add New Family

Family	Scheduled Visits	Action
 Jack Smith Tampa, FL	No scheduled visits.	Details Schedule Visit

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		Select
07/22/2011		Select
07/23/2011		Select

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		Select
9:15 AM - 9:30 AM		Select
9:30 AM - 9:45 AM		Select
9:45 AM - 10:00 AM		Select
10:00 AM - 10:15 AM		Select
10:15 AM - 10:30 AM		Select
10:30 AM - 10:45 AM		Select
10:45 AM - 11:00 AM		Select
11:00 AM - 11:15 AM		Select
11:15 AM - 11:30 AM		Select

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, 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:

Family Search | Family Details

Adam Brown 

Visits

[Schedule New Visit](#)

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

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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	Details
Cain Brown	Child	Details
Abeline Brown	Child	Details