

CareWorks Help

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Welcome to CareWorks Help

[For Help on how to print a user's guide, click here.](#)

The colored underlined text that you see above is an example of a Link. You will find such Links throughout the online help program. Clicking the Link takes you directly to that part of the program. Clicking Back on the toolbar takes you back to the previous topic.

Careworks comes with a complete Help program accessible from the CareWorks Help icon on your desktop. Double clicking the icon brings up this Welcome to CareWorks Help message in the right window and three tabs to the left from which you can look in the Table of Contents (Contents Tab), examine an index (Index Tab) or search the entire help system (Search tab). The Contents tab is open when you enter help.

Note that once you have opened the Help Menu you can click on the minimize button at the top of the screen and put Help on the Task Bar where you can access it at any time while working in CareWorks.

Contents Tab

The window on the left gives a listing of each topic within the program. Clicking a topic (for example The CareWorks Main Menu) displays a text file associated with that topic - the Main Menu in this example. Where there is a plus (+) sign next to the topic, it can be expanded by clicking the plus sign. This will show all sub-topics associated with the topic, and the user can click a sub-topic to view information about the sub-topic.

Index Tab

The index tab is a quick way for users to find information about their topic of interest. As you begin to type in a topic (or keyword), the list below the text box will highlight the topic most closely associated with your topic. For example, if the user type in "CONG" to view information about Congregations, the listing would highlight that keyword, and the user would simply click "Congregations" to display help on Congregations.

Search Tab

The search tab gives users the opportunity to search all of the text in the entire help system. By entering a word (keyword) or series of words into the text box and clicking the "list topics" button, the user is given a listing of all the topics and sub-topics that contain that keyword within the text. The number of topics returned might be very large - try typing in Receiver and the system will return more than 100 topics! The number of topics returned will be more manageable, if more specific keywords are used.

Printing Help Topics

To print a help topic make sure you are in the contents tab of the Standard Help System and select (highlight) the topic you want to print. Then, click the Print button on the toolbar. The program will ask you if you want to print out the selected topic, or to print the selected heading and all sub-topics. You may notice that the headings of subtopics print out with different print fonts as the printing progresses through the various sub-topics. This formatting difference is related to printer characteristics and affects only the way the document looks. It has no effect on the actual content of the topic and its sub-topics.

If you're patient (there are 25 topics with numerous sub-topics!!) and have a good printer, you can print out a full User's Guide by going down the table of contents and printing each topic with its subtopics. Be sure you have highlighted each topic in turn as you work down the list. Although there may be some variation in title fonts, as mentioned above, the result will be a usable guide.

Installation/Getting Started

Please don't leave this topic without referring to Do's and Don'ts below.

Installation

The system requirements for the CareWorks program are as follows:

RAM	128 recommended
Free disk space	50 MB
Windows 98 or higher	
Microsoft Word is required for the preparation of personalized (mail merge) form letters	
Microsoft Internet Explorer 5.0 or higher is required to use the Help menu	
An Internet Service Connection is needed to use the program's Get Map feature	

If you do not have Microsoft Word, you can prepare a standard (not personalized) letter on whatever word processor you have and use CareWorks mailing labels for the mail out.

Internet Explorer normally comes with Windows 98 and above. If you do not have it, you can download it or purchase it on a disk from <http://support.microsoft.com>. While connected to the Internet, click the link to connect to Microsoft.

You access the database from the desktop via Start-Programs-CareWorks or the icon.

When you purchased the database and entered the authorization code, all of the sample data plus any test data you entered were removed from the system leaving you with an empty database into which you can start entering your data. Suggestions for getting started follow.

Getting Started

You might start by clicking and reading the following topics in the CareWorks Help: - [CareWorks Help System](#), [Program Overview](#), [CareWorks Main Menu](#), and [Form Navigation](#). Note that on the tool bar you can move to a previous topic by clicking Back or Print to print the topic.

Next read the Help topic on [Program Data](#) and then go to Maintenance on the Main Menu and complete as much as possible of the Program Data form. You will need the password to enter the Maintenance menu. At least complete the name, address and phone number of your organization so they will appear on your paper forms.

Now select [Paper Input Forms](#) from the Main Menu and print out the forms for Volunteer Application, Receiver Intake Form, and Monthly Timesheet. To print a form, select and preview it, click the Printer on the tool bar (click the title bar of Print Paper Form and drag it out of the way if necessary). When finished, click Close on the tool bar and Close Form.

NOTE: The Paper Input Forms provided within CareWorks cannot be altered. If you would like to use forms that can be downloaded to MS Word on your computer and customized, please go to www.aboutcareworks.com and click on SUPPORT. The first FAQ provides all of the necessary forms.

At this point, you would do well to have a quick look at [Entering Data General](#). This topic has many broad subtopics, so you would probably do well to scan it to see what's there, get a feel for the general subject, and come back to it later for more detailed learning.

Next, go to the Help topic on [Entering Data – Member Congregations](#) and enter whatever Member Congregations are now part of your coalition. To do this, select Member Congregations from the Main Menu, click the Add button, and enter data in the General Information and Profile forms. If you don't yet have Member Congregations, when you get to entering Volunteers and Receivers, you can enter them as members of No or Unknown Congregation or Non-Member Congregation.

You are now ready to begin entering Volunteers and Receivers. First, have a look at these help topics: - [Entering Data – Volunteers](#) and [Entering Data – Receivers](#).

The above should get you off to good start, but there is much more to learn. So far, you have examined the first nine topics of CareWorks Help i.e. down to and including Entering Data - Member Congregations. Refer as needed to the remaining topics in the Table of Contents which are listed in the order that you will probably need them as a growing organization i.e. entering Community Records, Timesheets, Finding and Assigning Volunteers, Donations, Preparing and Using Reports, etc.

Do's and Don'ts

Do - Protect your large time investment in the database. It is essential that you follow a very disciplined backup procedure. Please refer to [Backing Up Your Data](#).

Don't - Shut down your computer with the database open on the screen. Use the EXIT button on the Main Menu bottom right corner. If you don't, this can result in data loss and damage to the database. A power failure, of course, represents the same risk. If, following such an incident, your system is not functioning properly, contact [Technical Support](#) for help with the problem. If your backups are current, tech support can easily restore your data and get you back in business.

Program Overview

The CareWorks database program has been specially designed for the use of non-profit caregiving programs. The program is Windows based and requires no prior database knowledge or programming skills. It produces a wide variety of reports to assist with program management, matches volunteers with care receivers, analyses performance to support grant applications, provides donation tracking to facilitate fund raising, and prepares mailing labels as well as personalized form letters.

The Faith in Action Caregivers Model

The national model for *Faith in Action* (FIA) caregiving consists of a coalition of congregations in a given community providing Volunteers to support their caregiving mission. A Director who works with Coordinators in each member congregation manages operations. Volunteers report their service hours monthly to the Director via the Coordinators. While the database has been designed to support this classic FIA model, groups that differ very substantially from the model can use it effectively. Refer to [Variations on the Model](#) for descriptions of other organizational configurations.

Variations on the FIA Model

The database can be used by a wide variety of organizations that differ very substantially from the classic FIA model. For those groups that are not organized around a coalition of member congregations, volunteers and receivers are simply entered as being from no or an unknown congregation. If there are no congregational coordinators, the volunteers report directly to the FIA office. The database can still be used to advantage by those groups that do not record service hours, although these statistics provide a very useful measure of performance.

Data can also be organized by location for those groups that have satellite offices or for whom data concerning a specific geographic area are important for grant reporting purposes. Further, the database accommodates those organizations that find it advantageous to organize volunteers into careteams when receivers have particularly heavy needs. More detailed information is given in Entering Data – [Using the Location Field](#) and [Organizing by Careteams](#).

Organization by member congregations, location and careteams is not an either/or choice. The database will accommodate groups that mix these different organizational parameters. However, users are advised to carefully weigh the advantages of organizing by location and careteams against the increased discipline that is required to maintain these additional features.

The CareWorks Database Program

Since the program is [menu driven](#), it is not necessary to understand what is behind the menu. No programming is required to operate the system. The following overview is, however, offered as a brief description of how the system works.

The criteria for deciding which data to include in the database have been those that, for a typical *Faith in Action* caregivers program are referred to frequently, required for operational

analysis, or needed for repetitive administrative tasks. Data that are specific to the local group, for example Volunteer references and the specifics of their training, are left to be covered by paper records.

Tables are used to store data in the database. Forms are used to enter data in the tables. The program extracts data from the tables and presents it in a variety of reports and other outputs that are designed to help staff manage the day-to-day operations of a caregiving Program.

There are five main tables. Three store data relating to people associated with the program, namely the Volunteers, Carereceivers, and members of the Community at large. A fourth stores information about Member Congregations, and a fifth contains data from monthly time sheets that quantify the services provided to Carereceivers by each Volunteer. The data in the tables are organized in horizontal Records (rows) and vertical Fields (columns). Each row contains the data for one record.

There are a number of secondary tables including dropdown lists (Combo Boxes) to help you make the correct choice when entering data.

Because the main tables have many Fields (columns), they are cumbersome to work with directly so the program provides forms to use for entering data. Because the number of fields is frequently too large to fit on one screen width, the fields are separated into separate pages called tabs. For example, the tabs for the Volunteer table are: General Information, Profile, Service Information, Availability, Assignments, Emergency Info, Donations and Advanced.

Many of the outputs of the system are reports that can either be viewed on the computer screen or printed out as hardcopy. Other outputs include mailing labels and personalized form letters.

The Main Menu

All features of the CareWorks program are accessed by clicking the corresponding button on the Main Menu. For example clicking the Receiver button brings up a list of all receivers from which individual records can be selected.

Buttons for the most frequently used features are on the left in the Main Menu window as follows:

[Global Listing](#)

[Receivers](#)

[Volunteers](#)

[Member Congregations](#)

[Community](#)

[Schedule One-Time Assignment](#)

[Create Permanent Assignment](#)

[Donations](#)

Other features of the program are listed at the bottom of the Main Menu screen as follows:

[Find-A-Volunteer](#), [Reports](#), [Timesheets](#), [Mail Merge & Mailing Labels](#), [Maintenance](#), [Backup](#), [Paper Input Forms](#), and [Exiting the Program](#)

To reach detailed descriptions of each feature click the feature in the lists above.

Form Navigation

The options listed below provide an overview of the various ways to move about the system. However, for more information on a specific form (Such as the Receiver or Community forms), it is recommended that you use the [index tab](#) and locate the help topic related to that form.

1. [The Global Listing](#)
2. [The Form Header, Details and Footer](#)
3. [Moving around the Form](#)
4. [Buttons found on the Form Footer](#)

The Global Listing

The Global Listing Feature is the most frequently used component of the system. It provides an alphabetical listing of all records in the Volunteer, Receiver, Community and Member Congregation tables, or it can be divided to show only a single table by clicking the arrow on the Type field at the top of the list and selecting a table.

To access the list of all records click Global Listing on the Main Menu. To access a list of Volunteers, Receivers, Community or Member Congregations click the corresponding button on the Main Menu.

Using the Lists

Double clicking the name on a list brings up the record for that name. Alternatively, you can click the name once and then click the **GoTo Record** button at the top of the screen. Use the scroll bar on the right margin of the table to move quickly to the name whose record you want to bring up.

For Example: If a Receiver calls up and gives their name, you can immediately view the "Receiver Listing" and click on the appropriate name to bring up the record.

The **Add New** button at the top of the screen gives the user the option to add a new record.

Clicking the **Add New** button at the top of Global Listing brings up a separate box asking which type of record the user would like to add (Receiver, Volunteer, Community or Member Congregation). Selecting a table brings up the corresponding blank form.

Clicking the **Add New** button when one is at the top of the Volunteer, Receiver, Community or Member Congregation lists brings up the corresponding blank form directly.

The **Main Menu** button at the top of a list takes the user from the list to the Main Menu

The Form Header

The top of each form, the Form Header, contains the name of the table you are looking at (Receiver, Member Congregation, etc.). The Form Header remains the same no matter what page, or [tab](#), of the form you are looking at.

The Body of the Form

The Body of the Form starts with a horizontal listing of the tabs, or pages, that make up the record.

Below the tabs for Receiver and Volunteer records there will always appear in bold black lettering the First and Last Name of the person to whom the record applies. Records for Member Congregations will show the Name of the Congregation in this position. If a Community record is for an individual, their name will appear in this position. Community records for organizations will show the name of the organization. For a description of the distinction between Community record for individuals and organizations, refer to [Community: General Information](#).

Following the name or organization are listed the various fields that contain information about the record in [tabbed format](#). This is the heart of the database – the place where all data about the record is entered. Where possible, an attempt has been made to organize similar data under the same tab name. For example, the General Information tab always contains the First and Last Name, address, city, state and zip fields.

The Form Footer

At the bottom of the form is the Form Footer containing a number of buttons, each corresponding to a specific action that the user may take while working in the form. The buttons on the form footer will be found on all forms throughout the system. For a description of a single button and its use click the link below:

1. [Previous Button](#)
2. [Next Button](#)
3. [Edit Record Button](#)
4. [Print Record](#)
5. [Find Record Button](#)
6. [Cancel Record Button](#)
7. [Save Record Button](#)
8. [Delete Record Button](#)
9. [Exit Record Button](#)

Buttons Found at Form Footer

Previous (Left Arrow) Button: When clicked, this button brings a user back by one record.

Next (Right Arrow) Button: When clicked, this button brings a user forward by one record.

For a description of how to use the Page Up and Page Down key to move rapidly through records refer to [Moving Around a Form](#)

Edit Record (Pencil Icon) Button: When clicked, the record is changed to “edit mode” which allows the user to change data in the record. When you Exit or Save the record, you will be asked if you want to save the changes or not. If you chose not to save the changes, the program exits from edit mode without saving the changes.

Print Record (Printer Icon) Button: When clicked this button prints a single record that summarizes all of the data from the various tabs that make up the record on the screen. The primary purpose of this printed record is to provide information prior to deleting a record from the system - see Delete Record below. Note that any printed record may contain confidential information and should be handled accordingly.

Find Record (Binoculars Icon) Button: Clicking this button brings up the Find dialog box. Using Find you can, for example, find all Volunteers with a Nurse entry in the occupation field or all Receivers who live in a certain city. The use of this feature is explained in [Finding Data](#).

Note that the quickest way to find the record for a specific person or organization is to look in Global View on the Main Menu.

Cancel Button: Clicking the Cancel button cancels all changes made while in Edit Mode. If you are entering data for a new record, the Cancel button exits the record without saving it.

Save Record (Diskette Icon) Button: This button is disabled until [Edit Button](#) has been clicked. When enabled, the Save Button allows the user to save information that has changed. When clicked, the program will ask you if you are sure want to save, click “yes” to save or “no” to continue in edit mode.

Delete Record (Garbage Icon) Button: Records can only be deleted from Edit Mode. When you click the Delete button, a message appears suggesting that you refer to the Help topic on to [Deleting Versus Changing Status](#) before continuing with the delete operation. Mostly, the Delete function will be used to delete records that are mistakes and do not belong in the system. Changing a record's Status is recommended when a Volunteer becomes Inactive or a Receiver is No Longer Served. Once you have deleted a record you cannot undo the delete operation. Deleting a record not only removes the record, but also all associated data such as donations, assignments, timesheets etc. Before deleting a record you are reminded to print a copy of the record so you can review and record what has been deleted. To delete a Congregation: you must go to MAINTENANCE.

Exit Record (Door Icon) Button: When clicked, this button asks if you want to save any changes you have made. If you answer Yes, the changes are saved and the program exits to the Global Listing to select a different record or exit to the Main Menu. If you answer No, the program exits without saving the changes.

Moving Around the System

Using Tabs:

As described in the [Description of the Database](#), the number of fields in a form is frequently too large to fit on one screen width. For this reason the fields are separated into separate pages called tabs. These tabs appear at the top of the form in the header as **tab buttons**. By moving from tab to tab a user can quickly display all the information on a specific record.

For Example: In the [Receivers Form](#), the first tab is [General info](#). By clicking on the [Initial Call tab](#), the user will be presented with information about the initial call taken for a specific receiver. A click on the [Donations tab](#) will display information about the donations of that same receiver.

Note: Here we are talking about the tab buttons at the top of each form, not the Tab key on your keyboard, the use of which is explained below.

Using the Mouse:

Just as you would in any Windows program, clicking a field with the mouse will move you to that field. To edit a field click on the Edit Record button at the bottom of the form (see [buttons on form footer](#)), then click the field and edit it.

Some Mouse - Tab Key Preferences:

Because of the [AutoZip](#) feature, you will find it convenient to use the tab key to make entries in the General Information form down to and including address. When you tab from the address fields, you are placed automatically in the Zip Code field where you can select zip, city and state entries from the list thus avoiding the need to enter city and state separately.

Using the mouse is the preferred way to enter a phone field since it reveals the area code +phone number formatting so you can go directly to the phone number if you don't want to enter area codes. If entering an area code, be sure the cursor is at the beginning of the (), otherwise the formatting will not accept the full three digits of the area code and you will get an error message.

Keyboard Techniques:

Pressing the **Tab Key** moves you to the next field on the form. Pressing Shift+Tab moves you to the previous field.

If you prefer, or if you do not have a fully functional mouse, you can navigate around a form by using the keyboard. To select a tab (the buttons at the top of the form) hold down the *Alt* key and click the underlined letter of the tab ("g" for General Info, "I" for Initial Call etc.),

You can use the **Page Up** and **Page Down** keys on the keyboard to move forward or backward among the records in a table. Holding the key down will move you rapidly from one record to the next. Since the records in a table are organized by ID number, you can use this technique to rapidly find a record with a specific ID number.

Pressing the **CTRL +HOME** keys will move you to the first record of table. **CTRL+END** moves you to the last record.

To see the full text of a text field (or memo field) that extends beyond the field width move the cursor to the field and Press **SHIFT+F2**.

To move the insertion point within a field, use the **arrow keys**.

Pressing the **ESC** key undoes changes to the current field.

Some features of the database display a **navigation bar** in the lower left corner of the screen that looks like this:

|< < Record 1 of 25 >>|

Clicking the buttons on the navigator has the following effects:

- |< moves to the first record
- < moves to the previous record
- > moves to the next record
- |> moves to the last record

Note that the numbers in the navigator are record numbers, not ID numbers. If a record is deleted, the numbering system does not adjust and all other ID numbers remain the same. Therefore, once you have deleted records from a table, e.g. volunteers, record numbers will be lower than the ID numbers.

Entering Data - General

As explained in the section on the [CareWorks Database Program](#), data are entered into the system via forms that are organized by tabs. Each tab contains field names that correspond as nearly as possible to the tab title. For example the General Information tab for Volunteers contains fields like First Name, Last Name, Address, etc.

The data that are entered in fields comes from a variety of sources: - Volunteer information from a paper Volunteer Registration Form, Receiver information directly from an incoming phone call, donation data from checks received, service hours from timesheets, etc.

This section of the help program – Entering Data - General – is intended to help you understand some of the general principles and common elements of the data entry process. It also offers tips on how to handle some of the less obvious features of the process.

- 1) A description of how to [Add New Records](#).
- 2) Three time saving features of CareWorks – [Auto Numbering, Combo Boxes and Auto Zip](#)
- 3) Fields that are [Common](#) to more than two forms.
- 4) [Formatted](#) Fields that help you enter data in the correct form.
- 5) What are the [Required Fields](#) and why?
- 6) Understanding the difference between [deleting a record and changing its status](#).
- 7) [Entering Couples](#) – one record for both or separate records?
- 8) Two advanced features that require special consideration – [Organizing by Careteams](#) and [Using the Location Field](#).

To move to any of the items on the list above select it from the Table of Contents at the left after clicking the + sign or click the link above.

Adding New Records

Note: Before adding a new record you may want to review [Auto Numbering, Combo Boxes and AutoZip, Formatted Fields](#) and [Required Fields](#).

It is particularly important to have available the information for required fields, since you cannot save a new record without making entries in these fields. If they cannot be completed, your only choice is to cancel the record and exit without saving it.

A Receiver Record

To add a Receiver record click the [add new button](#) from the Receiver listing. This takes you to the Initial Call tab on the Receiver form where information about the initial call can be entered.

The procedure for adding a new Receiver will vary from group to group. Some will take initial information over the phone, then send a coordinator to visit the Receiver to make an assessment of needs before assigning a Volunteer to the Receiver. Others may require the Receiver to complete a paper application. Others may do the entire process over the phone. Whichever process your group uses, the information flow is the same – move through the Receiver tabs in the following order - Initial Call, General Information, and Profile tabs filling in information as it becomes available.

Use the tab key to move through and out of the last field of the Initial Call tab. This will automatically move you to the General Information tab to continue entering data.

Required fields in the Receiver form are: First Name, Last Name, Salutation, Zip, Congregation, Status, Date of Initial Call. Click this link for more on [Required Fields](#).

Receivers who are not members of a congregation are entered as No or Unknown Congregation.

For guidance on completing fields unique to the Receiver form, i.e. not common fields, refer to [Entering Data – Receivers](#).

A Volunteer Record

To add a Volunteer record click the [add new button](#) from the Volunteer listing. This takes you to the General Information tab. Move from field to field and enter as much information as is available, for example, from a Volunteer Registration form. Move to the Profile and other tabs to continue entering information.

Required fields in the Volunteer form are: First Name, Last Name, Salutation, Zip, Congregation, Status, Date Training Completed. Click this link for more on [Required Fields](#).

Volunteers who are not members of a congregation are entered as No or Unknown Congregation.

A Community Record

To add a Community record, click the [add new button](#) from the Community listing. This takes you to the General Info tab on the Community form.

The Community table is designed to accept records that are not classed as Receiver, Volunteer, or Member Congregation, in other words – the community-at-large. This table can contain a wide variety of records from donors, to potential donors, to those that the Program simply wants to keep in touch with (e.g. newsletter), etc. It's most important use, however, is to keep track of donors who are not Volunteers, Receivers, or Member Congregations (these are recorded in their own tables). For this purpose the table differentiates between two different types of Community records – those where the record refers to an Individual and those where the record refers to an Organization.

If the record relates to an Individual, complete the First and Last Name fields but leave the Organization field blank. If it relates to an Organization, complete the Organization field and, if known, enter the name of the Contact Person in the First and Last Name fields. When an entry is made in the Organization field, the Occupation and Employer fields are disabled.

The First/Last Name or Organization fields are required, but not both. As for other forms, the Salutation and Zip fields are required.

The distinction between Individual and Organization records is important in recording donations. When the donation comes from an individual, it is credited to the individual. When it comes from an organization, it is credited to the organization. For more on entering community donations see [Community Donations](#).

A Member Congregation Record

To add a Member Congregation record click the [add new](#) button from the Member Congregation listing. This takes you to the General Information tab. Add information about the Head of the Congregation and the Coordinator, then move to Profile tab.

Required fields in the Member Congregation form are; First Name, Last Name, Salutation, Zip, Congregation Name and Congregation Abbreviation.

Auto Numbering, Combo Boxes, and AutoZip

Auto Numbering

The Auto Numbering feature provides for automatic and unique identification of each record in the Receiver, Volunteer, Community or Member Congregation table. A sequential number is given to each record as they are added to the database. If a record is deleted, the numbering system does not adjust and all other ID numbers remain the same. This is a MS Access feature.

Combo Boxes

Combo Boxes are the drop-down menus that come up when you click the down arrow to the right of a text field. Some Combo Boxes offer the user the option of selecting an entry from the list or creating his/her own entry. For example, in the Title Field of the [Community](#) General Information tab, you can choose from Mr., Mrs., or Ms., You can also enter any other title such as Dr. in which case you will be asked if you want to add the new entry to the list. Answering "Yes" will add the new title to the list. Answering "No" leaves the field blank.

Other Combo boxes present the user with a list that cannot be changed. For example, the list attached to the Volunteer Status field offers only the list;- Active, On Hold, In Training or Inactive. Throughout Help program Combo boxes also referred to simply as lists of List Boxes.

To quickly find an entry in a Combo Box list, you can type in the first few characters of the entry and the list will quickly move to that entry. For example, if you enter the Denomination/Faith field of the Receiver Profile tab and type "met", the program brings up Methodist from the List box. This feature is particularly useful when the list is very long as may be the case when entering

timesheet data for Volunteers and Receivers. This feature of the database is sometimes referred to as **AutoExpand**.

AutoZip

Although the area served by a user group may span many zip codes, most groups will find that they work daily with a fairly short list of zip codes and their corresponding City and State entries. The AutoZip feature allows you to create a list of zip codes with their cities and states. It works this way. When you enter a new zip code, a message come up "The item entered is not on the list. Do you want to add it?" If you answer "Yes", you are presented with a form in which to enter the corresponding city name and state abbreviation. From then on, every time you enter the Zip field, you can pick this zip from the list and the corresponding city and state will be automatically entered in these fields. If you answer "No", your zip entry will be accepted, but not added to the list.

When adding a new zip to the list, be sure to spell the city correctly and enter the right state code. Changing entries once they have been entered can only be done via the Maintenance Menu.

You may want to consider restricting use of Autozip to those zips that occur most frequently in your area. If you include all zips, the lookup list may very long. Adding zip + 4 entries to the list will also importantly expand the list. For Zip + 4 you might choose to add the 5 digit code from the list, add the 4 manually and choose not to add the entry to the list.

If your zip list is long, recall that, as for all Combo boxes, you can use **AutoExpand** to quickly move to the desired zip by typing in the first numbers of the zip until you find the one you are looking for.

Formatted Fields

Dates, Phone Numbers, and Postal Codes

Some fields in the database are formatted to ensure that the user enters data correctly. They provide users with a specific pattern to follow for entering data in the field. For example, all **phone number fields** (for both work and home phones) must be entered in the format of (xxx)-xxx-xxxx. This ensures that the user enters valid 10 or seven digit phone numbers.

Most **date fields** are formatted to accept dates in the short format mm/dd/yy. For example, you enter 05/02/09 for May 2nd 2009. Because of the need to reach back to earlier years, dates of birth must be entered in the long format mm/dd/yyyy. For example, for someone born on July 10th 1901 the date must be entered as 07/10/1901. If the date were entered using the short form, it would read 07/10/01, namely July 10 2001 and result in an incorrect age calculation. Some date fields that require the long format, produce an error message that "the entry is not appropriate for the input mask" if a short format date is entered. Remove the date and re-enter it in the long format.

A pop-up **calendar button** is provided for most date fields. This is the small square to the right of the field that looks like the page of a calendar. Clicking the button brings up a calendar for the current month with the current date shown in red. To enter a date from the current month, click the date (changes the background from gray to white), then click **OK** to enter the date in the field. Click cancel if you do not want to enter a date.

If you want to enter a date that is not in the current month, use the arrow buttons at the top of the calendar page to change to the month you want. Clicking **the << button** moves back one year. Hold it down to move quickly to earlier years. Clicking **the < button** moves the calendar back one month. Similarly **the >> and > buttons** move the calendar ahead by years or months. When you get to the correct month, don't forget to click the date then **OK** to enter it.

The calendar also enables you to **select a time of day for the date selected**. The only place in the program that uses this feature is in the entering the date and time of a [one-time scheduled assignment](#). First, select a date as described above, then to enter a time click the clock icon at the bottom of the calendar, select the hour, minutes, and am or pm, then click **OK** to accept the time entry and then **OK** again from the main calendar to enter both the date and time in the scheduler.

Postal Codes are formatted to accept either 5 or 9 figure zips:- either xxxxx or xxxxx-xxxx.

Required Fields

Some of the forms in the program contain fields that require you to make an entry. On a form, a required field appears with a yellow background as opposed to the standard white background. If you have not made an entry in a required field, a message will come up when you try to save or exit from the form reminding you to make an entry in the field. You will not be allowed to save or exit from the form without making an entry. If you do not have the required data, your only choice is to cancel the record and re-enter it when you have the data.

The following is a list of required fields, why they are important, along with some suggestions on how to complete them.

Congregation* This is a key element in the FIA organizational model and is required in Volunteer and Receiver records. If not known, choose No or Unknown Congregation from the drop down list.

Date Discontinued* The date that service to a Receiver was discontinued is required when their Status is changed to No Longer Served.

Inactive Date* The date that a Volunteer became inactive is required when their Status is changed to Inactive.

Date of Initial Call* The date when the initial call was received requesting help for a Receiver.

Date of Service* Required in the Timesheet Entry form.

Date Training Completed* The date on which a Volunteer's training was completed. For Volunteers In Training, this field only becomes required when the Status of the Volunteer is changed from In Training to Active.

First Name and Last Name* Required in Receiver, Volunteer, and Member Congregation forms to avoid records without a name. For Community records, either the First/Last Name **or** Organization is required, but not both.

Salutation* This is what comes **after "Dear"** in a mail merge letter. It cannot always be correctly constructed from the Title and First/Last Name fields. Therefore, the Salutation field is provided to

enter exactly how you want the letter to read. For example, if the mayor is John Doe, his title is The Honorable John Doe, but the salutation is Dear Mayor Doe, so you would enter Mayor Doe in the Salutation field. If the letter is to The Reverend John Smith, you might make the Salutation Pastor Smith. Without an entry in the Salutation field, mail merge letters will be addressed to "Dear" followed by a blank where the salutation should be. To avoid this problem, the salutation field is required for all records in the Volunteer, Receiver and Member Congregation tables.

The salutation field is not required for Community records because there may be records that are not connected with a name. However, if you don't make an entry in the Salutation field of a Community record, a message will come up reminding you that any mail merge you prepare will have an incomplete salutation entry. One way to work around this problem is to make a generic entry in such records, for example "Friend", "Friends", "Friends of Caregivers", "Friends at... (name of organization)", etc.

Many groups enter first name as the salutation for Receivers and Volunteers.

Status This field is important to establish whether the Volunteer or Receiver is active, inactive, no longer served, on hold, etc. These dates determine whether the Receiver or Volunteer is included as Active in the Profile Report for a given time period.

Zip* is required for Volunteer, Receiver, Member Congregation and Community records. Sorting by Zip is required by the Postal Service for bulk mailings. Zip also ensures faster delivery of regular mail.

In addition to the above, when adding a new Member Congregation, The three-character **Congregation Abbreviation** and **Congregation Name** are also required.

The Common Fields

Below is a description of fields that are found in two or more Forms. These fields represent the same information whenever they appear in a form.

*Designates that a field is [required](#)

1. **Address:** refers to the Address of the person or organization to whom the record applies. Two lines are provided for long addresses
2. **Age:** The age of Volunteers and Receivers is calculated automatically from the Date of Birth and today's date as set in your computer (Settings – Control – Date/Time function). It is therefore important that the computer date be set correctly or the age will be incorrect. Age as calculated appears in the Age field on the form. In addition to displaying age as part of the person's record, it is also used to calculate age distributions in the Profile Report.
3. **City:** refers to the City where the person or organization is located and is used for mailing purposes.
4. **Classification:** this field occurs as a separate tab on the Receiver, Volunteer, Community and Member Congregation forms. Its use is covered in a separate help topic: [Classification Field](#).

5. **Comments (Notes, Action Taken, etc):** is designed for the user to add any additional information that does not belong in any of the other fields. It is available on different forms where general information may seem pertinent.
6. **Date of Birth:** enter the date of birth of the person to whom the record applies. Select the date from the pop-up calendar or enter it in the field using the mm/dd/yyyy form, e.g. 04/17/1937.
7. **Denomination/Faith:** allows the user to specify the Denomination or Faith of the person or congregation to whom the record applies.
8. **Don't Mail** Check Box: check this box if a person or organization has requested that they not receive mail from your organization. The program will not prepare labels or mail merge documents for this record. Check the box again to remove the check.
9. **Email Address:** stores the email address of the person or organization to which the record applies.
10. **Extension:** refers to the phone extension that must be dialed after dialing a work phone number in Volunteer and Community records.
11. **Fax Number:** The Fax Number of the person or organization.
12. **First Name*:** refers to the First Name of the person to whom the record applies. Normally capitalize the first letter as in John.
13. **ID Number:** Each Receiver, Volunteer, Community and Member Congregation record is automatically assigned an ID number when the record is created. This number uniquely identifies the record and cannot be changed. If you delete a record, the ID Numbers of all other records in the table remain unchanged.
14. **Last Name*:** refers to the Last Name of the person to whom the record applies. Normally capitalize the first letter as in Doe.
15. **Map Column:** If your organization uses Map Coordinates to specify the location of Volunteers and Receivers, this field is used to enter a number or letter corresponding to the column (vertical axis) of a map.
16. **Map Row:** If your organization uses Map Coordinates to specify the location of Volunteers and Receivers, this field is used to enter a number or letter corresponding to the row (horizontal axis) of a map.
17. **Phone:** refers to the Home or Work Phone number of the person to whom the record applies.
18. **Cell Phone:** refers to the mobile/cell phone # where the Receiver, Volunteer or Community member can be reached.
19. **Priority** Toggle Button: When this button is in the On (red) position, the record is a Priority record and there is some urgent matter associated with the record which is described in the Priority Notes. On the Global Listing, in the far left column, the asterisk indicates a Priority message.

20. Salutation*: refers to the Salutation used in a mail merge document addressed to the person to whom the record applies. For example, Jonathan requests that he be referred to as "Jon", or Reverend Smith is to be address as Pastor Smith. NOTE: Do not add the word "Dear".

21. Sex: the Sex of the person to whom the record applies.

22. State: the State in which the person or organization is located.

23. Title: the title of the person to whom the record applies (i.e. Mr., Mrs., Rev., Dr. etc.). Note that this is not a required field. Many groups leave this blank for Volunteers and Receivers except for special cases like Dr. or Rev.

24. Zip*: refers to the Zip Code (or Postal Code) in which the person or organization is located. This is a required field. It is often used for sorting purposes. The Postal Service requires it for bulk mailing, and its use also makes for more rapid delivery of regular mail.

Entering Couples

Volunteers and Carereceivers who are **Couples** represent a special situation when it comes to data inputting. We recommend they be entered as separate records and not combined in a single record, which makes the statistics for age, sex, and number of individuals incorrect.

Creating separate records as described above will result in duplicate mailings. You can avoid these duplicate mailings by entering both in the Title and Salutation fields of the husband's record and **check the Don't Mail box** in the wife's record. For example, for Mr. And Mrs. John Doe, in the husband's record, for the Title field, you would enter Mr. & Mrs. and for the Salutation field, John and Jane or Mr. & Mrs. Doe or whatever is appropriate. Then check the Don't Mail box for Jane Doe. This will produce one label, envelope or mail merge document correctly addressed to both. However, you should not use this approach if there are entries in the Classification field of the wife, such as Coordinator or Trustee, since labels and mail merge letters to these selected classes will not be prepared. In this case, you have no alternative but to accept duplicate mailings.

Deleting Versus Changing Status

It is important to understand the difference between deleting a Volunteer or Receiver and changing their status to Inactive or No Longer Served. Deleting removes the individual permanently from the system along with all records relating to the individual, e.g. donations, timesheet entries, etc.

Changing their status to Inactive or No Longer Served leaves them in the system so that, in time related reports such as the Profile Report, they are included in the numbers and services provided for the period when they were active or served.

In practice, the Delete function will be used mainly to correct errors, for example, when a Carereceiver is entered in the Community table along with a donation entry and later it is discovered that the person is a Carereceiver. The Community record must be deleted and the appropriate entry made in the Carereceiver's record. Deleting records is covered in [Buttons Found at Form Footer](#).

The program provides for printing a copy of any deleted record and related data. It is strongly recommended that you do this in order to have a record of what is deleted and to be able to review

it. For example, if the record contained scheduled assignments, you will need to take appropriate action to handle this event.

Inactive Volunteers and Receivers No Longer Served are eventually removed from the system as part of [Year-End-Maintenance](#).

Organizing by Careteams

The database permits you to organize and track Volunteers by Careteams to serve a Receiver whose needs require multiple volunteers.

To create a Careteam, you first need to go to [Maintenance-Careteams](#), add a Careteam and give it a unique name. At the same time, you can assign a leader to the team or add one later. You can then add members to the team by going to the corresponding Volunteer records and selecting the team name from the dropdown list on the Careteam Affiliation field. Note that a Volunteer can serve on more than one team.

To assign a Careteam to a Receiver, go to the Receiver record and select the team from the Careteam field on the Advanced Tab. Note that a Receiver can be served by one and only one Careteam.

Volunteer hours for those who serve on teams are entered in the usual way via [Timesheet](#) entries. They are summarized in the Services Summary - By Careteam Report. See [Preparing & Using Reports](#).

You can operate a mixed system in which some Volunteers are not members of a team and some Receivers are not served by teams. However in this case note that:

- If a Volunteer not assigned to a team reports service hours to a Receiver who is served by a team, the hours will be credited to the team, i.e. the Volunteer is a “de facto” member of the team for purposes of time reporting even though not listed as a team member.
- If a Volunteer who is a member of a team reports service hours to a Receiver who is not served by the team, the hours will be credited to the Receiver not the team.

Using the Location Field

Using the Location field in the Volunteer and Receiver forms enables you to prepare a variety of reports that are detailed in the section on [Preparing and Using Reports](#). You can, for example, prepare a list of Receivers in a given location, the services provided, and the number of hours involved. A similar report can be created for Volunteers.

Before using the Location field, you will need to decide how you want to take advantage of this feature of the program. If you receive important funding to provide services for residents of XYZ Township, you may want to add this location to the list and enter it in the Location field of Receivers from this area. If you have a satellite office in a retirement community, you can use this as a Location and enter it in the records of all the Volunteers and Receivers who are managed from that office. On an even broader basis, if your organization has a central office with sub offices independently doing all the Volunteer and Receiver management for their areas, you can add each sub office to the Location list and enter the appropriate Location in all the Volunteer and Receiver records. You can then produce a variety of reports for single locations or all locations according to the way you have

chosen to use this feature of the program. Locations are entered in the Location field on the Advanced Tab of the Receiver and Volunteer Tabs.

You add new locations via [Maintenance – Locations](#).

Location is not a required field so you need to have the discipline to ensure that correct location entries are made in the appropriate Volunteer and/or Receiver records according to the way you have decided to use the Location field and that the fields are kept up to date.

Entering Data – Receivers

Descriptions of Receiver fields not covered in the [Common Fields](#) section are presented in this section organized by Tab title and may be accessed by clicking the + sign next to the heading at the left or by clicking one of the links below:

[Initial Call](#)

[General Info](#)

[Profile](#)

[Assessment](#)

[Permanent Assignments](#)

[One-Time Assignments](#)

[Donations](#)

[Emergency Info](#)

[Priority](#)

[Classification](#)

[Advanced](#)

Links to help on other forms:

[Member Congregations Form](#)

[Volunteers Form](#)

[Community Form](#)

Receiver: Initial Call

Most incoming Receiver referrals will be made to the program office by phone. This tab provides fields to record the details of such an incoming call. If referrals are recorded on a paper form, transfer the information to the fields in this tab.

Caller's Name: Record the full name of the person calling. This may be the potential Receiver, a member of the family, an agency or anyone who is acting on the Receiver's behalf.

Call Taken By: The name or initials of the person in the office who took the call.

Date of Call: The date the call is received. Note that this is a required field. A key report (the Profile Report) uses this date as the start of service.

Caller's Phone Number: So the caller can be contacted.

How Heard About Program: How did the caller hear about the program. Enter text that tells how the Receiver or Caller learned about the program, e.g. family member, another Volunteer, church group, website, advertisement, social service agency, etc.

Stated Needs: What does the caller say are the needs of the Receiver? Many programs will separately perform an assessment of the Receiver's needs, perhaps after visiting the Receiver. Actual needs that the program agrees to fill are recorded in the Services Required field on the Assessment Tab.

Call Notes: Record any relevant notes about the call or caller. For example who is the caller? how are they related to the Receiver?, where does the caller live?

After completing entries in the Initial Call tab, move to the General Info tab and continue entering data.

Receiver: General Info

The General Info Tab on the Receiver form provides the user with contact information and other pertinent general information. It will likely be the most frequently used tab on the Receiver form, because it contains all the information necessary to contact a Receiver.

All of the fields on this tab are described in the section on Entering Data – General - [Common Fields](#).

Receiver: Profile

This Tab describes the characteristics of the Receiver under the following fields:

Congregation: Click the down arrow and from the list box select a congregation from the list of coalition members. If the Receiver is a member of no congregation or the congregation is unknown, select No or Unknown Congregation. If the Receiver is a member of a congregation, but the congregation is not a member of the coalition, select Non-Member Congregation. As a key element in the FIA organizational model, congregation is a required field.

Name of Non-Member Congregation: If the Receiver is a member of a congregation, but is not a member congregation, enter the name of the congregation. This information may be useful in approaching such congregations as potential members.

Denomination/Faith: Choose the Receiver's denomination or faith from the list box. If their Denomination/Faith is not listed, choose Other. Leave blank if unknown. This information can be useful in matching a Volunteer to a Receiver of the same denomination/faith.

Ethnicity: The Ethnicity table is based on categories specified for Federal grant reporting requirements.

Low Income check Box: This is obviously a sensitive subject. Your organization will have to determine whether it wants to collect data on the income level of Receivers and, if so, what level constitutes Low Income. This information may be useful, or required, for some grant funding purposes.

Status: Click on the down arrow to enter Status category. You can place a new Receiver On Hold until an Assessment is completed, or go directly to Active. If a Receiver is accepted, but service is not possible at this time, place the Receiver on the Waiting List. When a Receiver is No Longer Served enter this as the Status. Don't forget to bring the Status category up to date when it changes.

Note that when Status is Active, On Hold, or Waiting List the Date Discontinued and Reason Discontinued fields are disabled (grayed out). You can enter data in these fields only when Status is No Longer Served. Also note that, if later you change No Longer Served to Active, you must first remove the date and reason discontinued before changing status to Active. If you do not remove the date, the record will still be counted as No Longer Served for reporting purposes, for example in the Profile Report.

It is important to understand the difference between changing a Receiver's Status to No Longer Served and deleting the record from the system. This subject is covered separately in [Deleting Versus Changing Status](#).

Classification: This topic is covered separately in [Classification Field](#).

Date Discontinued*: This date determines whether or not the Receiver is included as Active in the Profile Report for a given time period. It is a required field.

Reason Discontinued: when Status is changed to No Longer Served, select a reason from the list.

Receiver: Assessment

The process of assessing a Receiver's needs will vary considerably depending on the organization. Some will take initial information over the phone, then send a coordinator to visit the Receiver to make an assessment before assigning a Volunteer. Others may require the Receiver to complete a paper application. Others may do the entire process over the phone. Whatever the process, the results are recorded in the following fields of the Assessment Tab:

1. **Assessed By:** the name of the person who assessed the receiver.
2. **Date Assessed:** the date when the assessment occurred.
3. **Living Arrangement:** choose the receiver's living arrangements from the list box.
4. **Referral Source:** choose a referral source from the list box.
5. **Mobility:** choose a level of mobility from the list box. Where more than one item applies, select that which is most limiting. Go to Maintenance/Options to add more types of mobility.
6. **Services Required:** This gives a listing of the services that are required by a Receiver. **To add/remove Services**, in Edit mode click the Add/Remove Services button and add/remove services by selecting (highlighting) them and moving them to/from Available to Selected using the directional arrows. Click Close to close and save the changes.

7. **Assessment Notes:** This field is designed to make general notes on the assessment.

Receiver: Permanent Assignments

This tab contains a subform for [Permanent Assignments](#). Click the link for details on making Permanent Assignments.

Receiver: One-Time Assignments

This tab contains a subform for [One-Time Assignments](#). Click the link for details on making One-Time Assignments.

Receiver: Donations

The Receiver Donation Tab contains a subform that lists the donations made by the Receiver. Donations are entered via a form that comes up when the user clicks the Donations button on the [Main Menu](#). Data on a new donation entered there are added to the subform in the Receiver Donations Tab. Refer to the section on [Donations](#) for a complete description of how to add, edit and delete donations.

The Donation Notes memo field is provided to enter information about donations. For example: the donor has been contacted about contributing to the Annual Appeal and a follow up call is in order.

Receiver: Emergency Information

The fields in this Tab are self-explanatory. Use the Medical Notes memo field to describe medical conditions that are relative to servicing the Receiver.

Receiver: Priority

This feature is covered under [Priority Records](#).

Receiver: Classification

This feature is covered under the [Classification Field](#).

Receiver: Advanced

This Tab is reserved for using the advanced features of the program, namely the Location and Careteam fields. Note that only one team can serve a Receiver.

For a detailed explanation of the Careteam and Location features of the program refer to Entering Data–General–[Organizing by Careteams](#) and [Using the Location Field](#)

Entering Data - Volunteers

Descriptions of Volunteer fields not covered in the [Common Fields](#) section are presented in this section organized by Tab title and may be accessed by clicking the + sign next to the heading at the left or by clicking one of the links below:

[General Info](#)

[Profile](#)

[Service Information](#)

[Availability](#)

[Assignments](#)

[Emergency Info](#)

[Donations](#)

[Priority](#)

[Classification](#)

[Advanced](#)

Links to help on other forms:

[Member Congregations Form](#)

[Receivers Form](#)

[Community Form](#)

Volunteer: General Info

All of the fields in the Volunteer: General Info Tab are covered in Entering Data – General – [Common Fields](#).

Volunteer: Profile

This Tab describes the characteristics of the Volunteer under the following fields:

Congregation*: Click the down arrow and select a congregation from the list of coalition members. If the Volunteer is a member of no congregation or the congregation is unknown, select No or Unknown Congregation. If the Volunteer is a member of a congregation, but the congregation is not a member of the coalition, select Non-Member Congregation. As a key element in the FIA organizational model, this is a required field.

Name of Non-Member Congregation: If the Volunteer is a member of a congregation, but it is not a member congregation, enter the name of the congregation. This information may be useful in approaching such congregations as potential members.

Occupation: enter the Volunteer's occupation. Helpful in locating special skill needs.

Employer: enter Volunteer's employer. This information can sometimes be helpful for funding activities.

Languages: enter any language skills different from the dominant language in your service area. For example, if you are in a basically English speaking area, enter language skills other than English.

Physical Limitations: enter any physical limitations that you should be aware of in using the services of the Volunteer.

Status: Click on the down arrow to enter the Status category. You can place a new Volunteer "In Training" until training is completed. Many groups only enter Volunteers when they have completed training and their status is then entered as Active. Volunteers who are temporarily unavailable can be placed On Hold. If a Volunteer can no longer serve, change Status to Inactive. Don't forget to bring the Status category up to date when it changes.

Note that when Status is Active, On Hold, or In Training the Date Inactive and Reason Inactive fields are disabled (grayed out). You can enter data in these fields only when Status is Inactive. Also note that, if later you change status from Inactive to Active, you must first remove the date and reason inactive before changing status to Active. If you do not remove the date, the record will still be counted as Inactive for reporting purposes, for example, in the Profile Report.

It is important to understand the difference between changing a Volunteer's Status to Inactive and deleting the record from the system. This subject is covered separately in [Deleting Versus Changing Status](#).

Reason Inactive: when Status is changed to Inactive, select a reason from the list.

Date Inactive*: This date determines whether the Volunteer is included as Active in the Profile Report for a given time period. It is a required field.

Volunteer: Service Information

How Became Interested: choose an entry from the list.

Transportation: From the list, choose the mode of transportation that the Volunteer has available.

Mileage Limit: How far is the Volunteer willing to drive?

Services Offered: This gives a listing of the services that are offered by the Volunteer. **To add/remove Services**, in Edit mode click the Add/Remove Services button and add/remove services by selecting (highlighting) them and moving them to/from Available to Selected using the directional arrows. Click Close to close and save the changes.

Will Do Spot Jobs Check Box: Some Volunteers may be interested only in permanent assignments. Check this box if the Volunteer is willing to undertake one-time spot assignments.

Date Training Completed*: Volunteers are considered active only when they have completed training. They are included in the Profile Report as of this date. It is a required field.

Date Retraining Required: The type of services provided by some programs may be such that they want their Volunteers to be retrained after a specified period. In this case, you may enter a retraining date in this field.

Insurance Expiration Date: provided to enter the date on which the Volunteer's auto insurance expires.

License Expiration Date: provided to enter the date on which the Volunteer's driver's license expires.

Volunteer: Availability

The Availability form on this tab is used to record the days and times of day (morning, afternoon and evening) that the Volunteer is available to provide services. To enter days and time, shift to Edit mode and click the boxes when the Volunteer is available. For example, if the Volunteer is available All Day Sunday and Evenings on Monday, Tuesday, and Wednesday, click these boxes which will change from red to green and show Available instead of Unavailable.

The program converts the box entries into a code string that is entered in reports used, for example, to find a volunteer for a specific assignment. For example, the coded string for the above example would read AD7E123 for All Day Sunday and Evenings Monday, Tuesday, and Wednesday. Use of coded strings is covered in [Finding-A-Volunteer](#) and [Volunteer Reports](#).

If the Volunteer is a **Congregational Coordinator**, check the box that indicates that the Volunteer is a Coordinator. When this box is checked, the designation "Coordinator" will appear in the Availability column for this person in the various reports that list availability, e.g. the Volunteer Master Reports. This recognizes that Coordinators generally do not volunteer for specific days and times.

Volunteer: Assignments

This tab contains two subforms – one for [Permanent Assignments](#) and one for [One-Time Assignments](#). Click on the links for details of how to enter data into these subforms.

Volunteer: Donations

The Volunteer Donation Tab contains a subform that lists the donations made by the Volunteer. Donations are entered via a form that comes up when the user clicks the Donations button on the [Main Menu](#). Data on a new donation entered there are added to the subform in the Volunteer Donations Tab. Refer to the section on [Donations](#) for a complete description of how to add, edit or delete donations.

The Donation Notes memo field is provided to enter information about donations. For example: the donor has been contacted about contributing to the Annual Appeal and a follow up call is in order.

Volunteers: Emergency Contact Info

This Tab records information about an emergency contact for the Volunteer in the following fields the contents of which are self-explanatory:

The Name of the Contact
Home Phone and extension
Work Phone and extension

Volunteer: Priority

This feature is covered under [Priority Records](#).

Volunteers: Advanced

This Tab is reserved for using the advanced features of the program, namely the Location and Careteam fields. Note that a Volunteer may serve on more than one team.

For a detailed explanation of the Location and Careteam features of the program refer to *Entering Data-General-[Organizing by Careteams](#) and Entering Data-General-[Using the Location Field](#)*

Entering Data – Member Congregations

Descriptions of Member Congregation fields not covered in the [Common Fields](#) section are presented in this section organized by Tab title and may be accessed by clicking the + sign next to the heading at the left or by clicking one of the links below:

[General Info](#)

[Profile](#)

[Donations](#)

[Priority](#)

[Classification](#)

Links to help on other forms:

[Volunteers Form](#)

[Receivers Form](#)

[Community Form](#)

Member Congregations: General Info

This Tab provides the user with general information about the congregation. It is divided into two panels, one for information about the head of the congregation and the other for information about the coordinator of the congregation.

Head of Congregation:

Title: Enter the appropriate title for the Head of the Congregation, e.g. Reverend, Pastor, Rabbi, etc.

Salutation: Enter an appropriate salutation. Note that this may be different from the Title. For example the correct salutation for Reverend John Jones may be Pastor Jones.

First Name and Last Name: As usual

Position: The position of the head of the congregation, e.g. Rector, Pastor etc.

Coordinator:

Pick the **Name** of the coordinator from the list. The Coordinator's **Phone** and **ID #** are entered automatically. Under **Backup Information** add any notes concerning backup coordinators, if any, such as name, phone, special arrangements etc.

Member Congregations: Profile

Most of the fields on this form are covered in Entering Data – General – [Common Fields](#). Those that are not are described below.

Congregation Name: Enter the name of the member congregation, e.g. St. Joseph Roman Catholic Church. B'nai Israel, etc.

Abbrv: This field contains an abbreviated code that is used to identify the congregation in Reports. The code should be three characters maximum and may consist of capital letters or numbers. For example you might enter FUM for First United Methodist Church or PR2 for a second Presbyterian Church. Be sure the code is unique and does not duplicate a code already in use.

Denomination/Faith: Select a denomination or faith from the List Box. If the denomination/faith is not listed choose OTHER. Go to Maintenance/Options to add any additional denominations.

Other Denomination: If the denomination/faith of the congregation is not included in the List Box, enter the denomination/faith of the congregation here for general information. This field is disabled (grayed out) except when Denomination/Faith is Other.

Effective Date: enter the date the record was created.

Member Congregation: Donations

The Member Congregations Donation Tab contains a subform that lists the donations made by Member Congregations. Donations are entered via a form that comes up when the user clicks the Donations button on the [Main Menu](#). Data on a new donation entered there are added to the subform in the Member Congregations Donations Tab. Refer to the section on [Donations](#) for a complete description of how to add, edit and delete donations.

The Donation Notes memo field is provided to enter information about donations. For example: the donor has been contacted about contributing to the Annual Appeal and a follow up call is in order.

Member Congregations: Priority

This feature is covered under [Priority Records](#).

Member Congregations: Classification

This feature is covered under the [Classification Field](#).

Entering Data – Community

The Community table is designed to record information about individuals (and organizations) of interest to the program that are not Volunteers or Receivers, but members of the “community at large”. It would include, for example, physicians, attorneys, business organizations, health care providers, donors (who are not Volunteers, Receivers, or Member Congregations), those who receive a newsletter, etc. It will be the largest table in a typical program containing perhaps 1000 to 2000 records. Importantly, the table would also include clergy in the community with whom the interfaith coalition wishes to keep in touch, but who are not member congregations. Member Congregations are listed separately in the Member Congregation table.

Unlike the Volunteer and Receiver tables where the records refer only to individuals, the community table contains a mixture of records some of which refer to individuals and some to organizations. It is important to be able to distinguish between these two types of records for tracking and soliciting donations. The following note that appears at the bottom of the General Information form highlights this duality:

If this record relates to an individual, enter the First Name and Last Name fields, but leave the Organization field blank. If it relates to an organization, complete the Organization field and, if known, enter the name of the Contact Person in the First Name and Last Name fields.

To ensure that a record is associated either with an individual or an organization, the First Name/Last Name or Organization are required fields, but not both.

If there is an entry in the Organization field, the Occupation and Employer fields are disabled, since they relate only to Individuals. If there are entries only in the First Name/Last Name fields, the Position in the Organization field is disabled since it relates only to an Organization.

Note that, in the [Global Listings](#) Community records for individuals (i.e. no entry in the Organization field) are listed by the name of the individual. Records with an entry in the Organization field (with or without an entry in the Last Name First Name fields) are listed by the name of the organization.

Descriptions of Community fields not covered in the [Common Fields](#) section are presented in this section organized by Tab title and may be accessed by clicking the + sign next to the heading at the left or by clicking one of the links below:

[General Info](#)

[Personal Info](#)

[Donations](#)

[Classification](#)

[Priority](#)

Links to help on other forms:

[Member Congregations Form](#)

[Receivers Form](#)

[Volunteers Form](#)

Community: General Info

The General Info Tab on the Community form provides the user with general information about a community individual or organization. Most of the fields in this form are covered in Entering Data – General – [Common Fields](#). Those that are not are described below. Note the distinction between Organization and Individual records that is described fully in [Entering Data – Community](#).

First Name: the First Name of the individual, or contact person if the record is for an organization

Last Name: the Last Name of the Individual, or contact person if the record is for an organization

Organization: the name of the organization if the record is for an organization

Community: Personal Info

This tab records personal information about the individual to whom the record applies.

Position: The position of the Contact Person in the organization, for example Executive Director.

Occupation: the individual's occupation. May helpful in locating community skills.

Employer: the individual's employer. May be helpful for fund raising and other types of support.

Entry Date: *The date the record was created, normally today's date*

Community: Donations

The Community Donation Tab contains a subform that lists the donations made by individuals or organizations in the Community table. Donations are entered via a form that comes up when the user clicks the Donations button on the [Main Menu](#). Data on a new donation entered there are added to the subform in the Community Donations Tab. Refer to the section on [Donations](#) for a complete description of how to add, edit and delete donations.

The Donation Notes memo field is provided to enter information about donations. For example: the donor has been contacted about contributing to the Annual Appeal and a follow up call is in order.

Community: Classification

This feature is covered under the [Classification Field](#).

Community: Priority

This feature is covered under [Priority Records](#).

Timesheets

Timesheets record the number of hours that a volunteer has worked and miles driven for caregivers during the month, for whom the service was provided, the type of service performed and the date of service. They usually also include volunteer activities not directly associated with carereceiver services such as training, coordination, office work, etc. Timesheets may be submitted by individual Volunteers and summarized by the Congregational Coordinators, or submitted directly to the program's office. A suggested Monthly Volunteer Timesheet form can be printed out from the Paper Input Forms button on the Main Menu (or from www.aboutcareworks.com/support/FAQ's). The database is also well suited to taking timesheet data directly over the phone.

Accurate and timely reporting of volunteer activities is essential for the good management of a caregiving Program. It enables the Director and Coordinators to manage operations more effectively, provides the Board of Trustees and Member Congregations with a quantitative measure of the extent to which the organization is responding to its mission, and forms a valuable basis for approaching foundations and businesses for financial support.

The database is set up to manage timesheet data on a monthly basis. Volunteers are asked to complete a timesheet report monthly recording the services they have performed during the month. This report lists the Volunteers name, the Receivers name, the Service performed, and the number of hours spent and miles driven for each service.

Data should be entered when the timesheets are handed in and, by using the calendar button, an exact date of service is recorded. When requesting reports, you can use the calendar button again to retrieve your Services Rendered information.

The monthly timesheet report also provides a column for Miles driven. Some user groups may want to record miles, for example, to support a grant from a particular foundation. Mileage figures may also be of interest to some Volunteers who are eligible for a tax deduction for the cost of miles driven. Recording miles is not routinely recommended, however, since it adds an additional burden to volunteer record keeping. Two reports are produced under the Services category - one for transportation miles only and a second for total miles reported for all services.

Click the following links to learn about entering new timesheet data and viewing and editing the timesheet table:

[Data Entry](#)

[View/Edit Data](#)

A form for timesheet entry can be printed out from the Main Menu – Paper Input Forms. (or downloaded into MS Word from [www.aboutcareworks.com/Support/FAQ #1.](http://www.aboutcareworks.com/Support/FAQ#1))

Timesheets-Data Entry

Before starting timesheet entry, organize the available **timesheets** for the month you are entering. It is good practice to review the reports to **be sure they are complete and legible**. Required fields for data entry are exact date, Volunteer name, the service performed (using the standard list – Transportation, Visiting etc.), and number of hours. Receiver is not required, but an entry is expected for all services except those that do not involve a Receiver e.g. administration. Legibility in timesheet reports is important since data entries are made from dropdown lists of Volunteer and Receiver names so the reports need to be clear about what names are involved. If in doubt, examine the global listing to try to clarify the entry.

Clicking the Timesheet button on the Main Menu opens a blank timesheet form in **Data Entry mode**. The form consists of a calendar button at the top to enter the exact date for the timesheets you are about to enter, a one-line blank **Entry Record** into which you enter a single timesheet entry, and a table below the Entry Record which temporarily stores the records you have entered. The table is empty (grayed out) until you begin entering records.

To enter data, start by selecting the exact date from the calendar button at the top of the form. Once entered, the date is automatically transferred to the date field of the Entry Record. You can use the tab key or the mouse to move around the Entry Record. After entering the date, press the tab key twice or use the mouse to move to the Volunteer field.

The Volunteer, Receiver, and Services fields all have dropdown lists. There are two ways to use the dropdown lists. Either you can click the down arrow and scroll down the list to find the entry you want, select it, or you can use the program's [AutoExpand](#) feature.

Using AutoExpand, you start by typing in the field the first letter of the value you want. Then type additional characters, and AutoExpand will change the value displayed to match all the characters typed. Usually, typing two or three letters will take you to the value you want. This is a quick way to find and enter data, moving from field to field using the tab key. The only precaution when using this feature to find Volunteers and Receivers is to always check the first name that goes with the entry to be sure it is correct. If there are two individuals with the same last name, AutoExpand will give you the one whose first name comes first. For example, if the Volunteer list contains a Smith, Robert and Smith, Sally. Robert will come up first. If you want Sally, you have to key in the comma and the space followed by s for sally to get to Smith, Sally. Alternatively you could click the down arrow and select Smith, Sally from the list.

When you finish entering data in the Entry Record, **keep tabbing** which will move you to a new blank entry form, or you can click **Save Record** to move to a blank entry form. As you add new records they are added at the bottom of the table.

In general, you will find it **more efficient to use the tab key** to move along the Entry Record and AutoExpand to select entries. Starting with the Volunteer field, use AutoExpand to select the Volunteer, then press the tab key to move to the Receiver field and use AutoExpand to select the Receiver. Do the same for the Service field and complete the record with hours and miles using the number keys. (You can use Shift+tab to move backwards in the Entry Record.) This technique allows you to enter data without having to switch back and forth from keyboard to mouse as you would if you use the mouse to move along the Entry Record.

Note that the dropdown lists contain only Volunteers and Receivers whose status is **Active**. If you encounter a timesheet record for a Volunteer or Receiver who does not appear on the dropdown list, either the person's record has been incorrectly changed to Inactive/No Longer Served (or On Hold), in which case you should examine the case and make an appropriate change to the record, or the person has become Inactive after the service was performed. In the latter case, you might choose not to enter the record and accept this small inaccuracy in your timesheet records, or, if you want to be rigorous, you could change the record to Active, enter the timesheet data and return the person's record to Inactive.

You can edit the data in an entry record, but if you discover that you have made an error after moving it to the table, then select the record in the table (click the gray square at the left end of the record line to highlight the record), press the delete key to delete the record and reenter it correctly from a new Entry Record. Be very careful to only delete the intended record, there is only one warning.

It is recommended that you check the accuracy of data entry periodically by comparing the data on the screen against the paper input forms.

When you have finished entering timesheet data, click **Save New Entries** which will transfer the new records you have entered in the temporary table on the screen to the permanent timesheet table.

Timesheets-View/Edit

This feature of the database allows you to view and, if needed, edit the records in the timesheet table. This table is by far the largest in the system. For many user groups it will total 15,000 to 25,000 records. Therefore, it may not be easy to find and change incorrect entries. Your best insurance is to be sure that the person entering timesheet data is thoroughly familiar with the process and checks their work before it is saved to the timesheet table. Because of the possibility of incorrect usage, only those familiar with timesheet entries should attempt to edit the timesheet table.

To help you search the timesheet table it is sorted first by date, then Volunteer Name and then Receiver Name.

To edit an entry, select it by clicking anywhere in the record and click Edit Record. This will transfer the record to the Entry Record line at the top of the screen where you can change it as needed. To change the date of a record, use the calendar button at the top of the form. When finished click **Save Record**. Note that changes are not saved if you click Main Menu before clicking Save Record.

To use **Find Next** move the cursor to the field and value you want to find and click Find Next. The cursor will move to the next occurrence of that value. For example, clicking on Smith, John in the Volunteer column then clicking Find Next will move the cursor to the next occurrence of Smith, John.

Here are a few examples of the kind of errors that can be corrected via View/Edit:

1. You encounter a report with an unusually large hours figure for the period 1/09 to 3/09. Using the calendar at the top, enter 01/2009 and examine the Hours column for any

exceptionally large figures. If found, refer back to the original timesheet records and correct the error. Use the same process to search the months of 02/2009 and 03/2009.

2. Using AutoExpand, volunteer Sara Smith is incorrectly entered as Sally Smith during data entry for 03/09. Use the calendar at the top of the form to bring up 03/09, move the cursor to the first occurrence of Sally Smith, click Edit Record to move the record to the Entry Record at the top of the form, change Sally Smith to Sara Smith and click Save Record. Use Find Next to find the next occurrence of Sally Smith and repeat the process.
3. A new office volunteer incorrectly enters last month's timesheet data using this month as the month/year. Locate the records entered incorrectly (use the calendar or scroll to them), move them to the Record Entry form at the top of the table and change the date to the correct month using the dropdown calendar at the top of the form.

Finding & Assigning Volunteers

The contents of this section of the Help menu are presented under the following headings which may be accessed by clicking the + sign next to the heading at the left or by clicking one of the links below:

[Types of Volunteer Assignments](#) – A discussion of Permanent and One-Time Scheduled Assignments

[Finding-A-Volunteer](#) describes how to use the database to find a Volunteer who will provide the services requested by a Receiver.

[Permanent Volunteer Assignments](#) are those where the Volunteer has an on-going responsibility to provide services to a Receiver.

[One-Time Scheduled Assignments](#) cover those cases where the Volunteer is responsible for providing a specific service at a given time and date.

Types of Volunteer Assignments

The database provides for recording two types of assignments: Permanent Assignments and One-Time Scheduled Assignments.

A **Permanent Assignment** is one in which the Volunteer undertakes to provide, on an on-going basis, the services requested by the Receiver. Once a Volunteer is assigned, they make their own plans with the Receiver for the agreed services. For example: arrangements for next week's shopping or visit to the doctor. This approach has the advantage of placing minimum demands on the caregiving office where staffing is always at a premium. It also allows for the development of a personal relationship – something that is welcomed by many Receivers who live in relative isolation.

Permanent assignments may last a few months or several years. In any case, the operating principle is the same – the Volunteer and Receiver make their own arrangements for the services that are required.

A **One-Time Scheduled Assignment** is one in which the Volunteer undertakes to provide a specific service for a Receiver on a specific time and date. Although this method can be used for scheduling any service, it is most frequently used where transportation is a major activity of the program

It is recognized that some casual one-time assignments may be made which do not lend themselves to the detailed scheduling described above. For example: where a Volunteer is asked to fill in for another Volunteer who is on vacation. In this, as for all volunteer activities, it is important to encourage Volunteers to file monthly timesheets so there will exist a record of services rendered.

For help on identifying Volunteers to fill assignment needs see [Finding-A-Volunteer](#).

Assignments are recorded via the [Main Menu](#) buttons for Create Permanent Assignment and Schedule One-Time Assignment. They may also be entered using the Add Assignment buttons on the Receiver and Volunteer Assignments tabs.

Finding a Volunteer

The Find-A-Volunteer button on the [Main Menu](#) offers a structured approach to finding a volunteer to fill specific service needs. The program presents you with a report of active Volunteers who have offered to provide the service you need. The report includes the total number of hours each Volunteer on the list has reported for whatever time frame you specify. This allows you to focus on those who have reported no or few hours. The report includes other relevant information concerning the volunteers, including their phone number, congregation and availability. The report offers four sort options; by congregation, location, map coordinates and name.

When you click the Find-A-Volunteer Button, you are presented with a form that asks what service is required and what time frame you want for service hours. We suggest you pick the last three or last six months for service hour reporting. (As for all reports of this type, if you do not enter dates, the hours column will be blank.) You can then choose to print the report or to view it on the screen.

Examining the report sorted by congregation enables you to pick one or more congregations that have volunteers for this service and also to focus on those that appear to have volunteers who have not been very busy during the time frame of the report (assuming your group has a reasonable record for timesheet reporting). You can then approach the coordinators of these congregations to have them contact prospective volunteers or you can approach them directly. If the request from the Receiver is for a specific day and time, refer to the availability of potential candidates in making the choice.

The report sorted by [Map Coordinates](#) allows you to focus on volunteers who are in or near the map location of the Receiver needing service. Similarly, if you have established locations that are of special interest to your group, examining the report sorted by location may lead you to successful match. Refer to [Using the Location Field](#) for further information on the use of this feature. For more general use, you can choose the last sort order (by name) which simply sorts the list by the last name of the Volunteer.

As part of the selection process you may want to examine the Assignments tab of the records of any Volunteers you are considering. This will show you their current assignments and avoid duplication and overload.

Whereas the above describes a fairly structured method of finding a volunteer, there are many less structured approaches of doing this. For example, if the Receiver is from a member congregation, it makes sense to start there, or to start with a congregation that has a large number of volunteers. In any case, the search is obviously not complete until a Volunteer has been contacted and agrees to do the job at which point a [Permanent](#) or [One-Time Assignment](#) can be made. NOTE: The assignments are not like the TIMESHEETS. Not until the service has actually been performed can it be entered into TIMESHEETS.

Permanent Assignments

After you have identified a Volunteer to accept a permanent assignment (see [Finding-A-Volunteer](#)) there are three ways to enter the assignment in the database:

- A) You can click the Create Permanent Assignment button on the Main Menu. This takes you to the Create Permanent Assignment form. First, select the Receiver to whom the assignment applies from the list box. Next, select the congregation that is assuming responsibility for the assignment ("Assigned to Congregation" on the form) and then select the Volunteer from the list box. (The list includes only Active Volunteers), **or**
- B) You can go to the Receiver's form, move to Edit mode, click Add New Assignment on the Permanent Assignments tab and enter The Assigned Congregation and Volunteer there, **or**
- C) You can go to the Volunteer's form, move to Edit mode, click Add New Assignment on the Permanent Assignments subform of the Assignments tab and enter The Assigned Congregation and Receiver there.

When adding an assignment via the Receiver or Volunteer form, click Add to record the assignment or Close Form to cancel.

Using approach B) or C) allows you to see who has already been assigned to the Receiver or Volunteer and thus to avoid duplicate entries.

Once an assignment is entered by any of the above methods, it is automatically entered in the assignment subforms of the corresponding Receiver and Volunteer records.

Note that it is possible to leave both the congregation and volunteer fields blank in which case the assignment will appear as unfilled in the assignments reports. However, an alternative way to flag unfilled assignments is to record the need in the Receiver record as a [Priority](#) item. This has the advantage of keeping the need in front of you each time you enter the Main Menu.

Also note that it is possible to assign the Receiver to a congregation without specifying a Volunteer. In other words, the congregation accepts to provide the services needed, but retains the flexibility of assigning whoever is available.

Since the program is designed to accept more than one Volunteer per Receiver, each user group will have to make a policy decision concerning how it wants to manage the responsibility for Receivers to whom more than one Volunteer is assigned when the Volunteers come from different congregations. One option is to consider that one and only one congregation will be responsible for the Receiver even though Volunteers from other congregations are involved. In this case, the Assigned To Congregation entry will be the same for all Volunteers assigned to that Receiver. Alternatively, the responsibility can be assigned to the congregation of each Volunteer. This essentially leaves the overall responsibility with the central office.

Assignments can be deleted either from the Receiver or Volunteer forms. In the Receiver Form, go to the Permanent Assignments tab and, in Edit mode, click Remove Assignment. In the Volunteer Form, go to the Assignments tab and, in Edit mode, click Remove Assignment.

When a Volunteer becomes Inactive you should redo assignments if the Receiver still needs help and remove assignments from the Inactive Volunteer's record. If the assignment is left in place on the Inactive Volunteer's record, the assignment will be listed in reports as an Unfilled Assignment for the Receiver.

Periodically, you will want to review the Permanent Assignments report and update assignments via the Receiver or Volunteer forms.

One-Time Assignments

After you have identified a Volunteer to accept a One-Time assignment (see [Finding-A-Volunteer](#)), click the Schedule One-Time Assignment button on the Main Menu which takes you to the Schedule Volunteer Form. Fill in the form as follows:

- Receiver:** Select the name of the Receiver from the list (Active only).
- Service:** Select the service to be provided – Transportation, Shopping etc.
- Date:** Enter the date service is to be provided. You can use the Calendar button or enter the date directly in the field.
- Time:** Enter the time the service is to be performed or use the Calendar button. Use of the Calendar is described in [Formatted Fields](#).
- Assigned to Congregation:** If the request is first passed to a congregation, enter the name of the congregation here.
- Volunteer:** Select from the Volunteer List (Active only).
- Entered By:** Name or initials of person entering the data.
- Date Entered:** Enter date. The default entry is today's date.
- Details, Instruction, etc.:** Enter scheduling details – where to go, who to see, what to do,
- Confirmed:** Check this box when the schedule has been confirmed with the Receiver.

Alternatively, you can enter One-Time assignments directly on the Receiver or Volunteer forms. Go to the One-Time Assignments tab of the Receiver form and, in Edit mode, click the Add Button at the top of the subform and make the above entries there. On the Volunteer form, go to the One-Time Assignments subform on the Assignments tab, and in Edit Mode, click Add One-Time Assignment and make the above entries.

Entering assignments directly in the Receiver and Volunteer forms allows you to see who has already been assigned and thus to avoid duplicate entries.

Whichever method you use, the assignment is automatically entered in the assignment subforms of the corresponding Receiver and Volunteer records.

Note that it is possible to leave both the congregation and volunteer fields blank in which case the assignment will appear as unfilled in the assignments reports. However, an alternative way to flag unfilled assignments is to record the need in the Receiver record as a [Priority](#) item which will keep the need in front of you each time you enter the Main Menu.

The **Standing Instructions** field below the assignment table on the Receiver form can be used to enter repetitive instructions, for example "Take Mrs. Jones to see her husband in Crestwood Nursing Home every Tuesday". The entry in the Details field would then read "See Standing Instructions".

To edit or remove an assignment, go to the Assignments tab of the corresponding Receiver or Volunteer form and, in Edit mode, click Edit One-Time Assignment. The form that comes up offers the options of editing or deleting the appointment.

Periodically, you should go through the system and delete completed or outdated assignments. The Services Schedule reports can serve as a basis for this review. For historical purposes you may decide not to remove old assignments from the system, but be aware in this case that the reports will become increasing long with time.

Note that changing a Volunteer's Status to Inactive or a Receiver's Status to No Longer Served does not remove them from the schedule.

Donations

Fund raising is an ever present need of most non-profit caregiving programs. The database provides a convenient, easy to use, system to keep track of donations. It supports donor solicitations ranging from bulk mailings, for example to all those listed in the Community table or all Receivers, to selected contacts with more significant donors.

A novel feature of the database is that all donations are entered directly in the Volunteer, Receiver, Community and Member Congregation records. This avoids the massive duplication and error potential that comes with a separate donor table.

Click these links for information on [Donation Types](#), [Entering Donations](#) and [Soliciting Donations](#)

Donation Types

To facilitate recording and analyzing donation data, the database requires that you identify each donation by its type. Donation types can be divided into two categories: those that are related to specific fund raising events, such as an annual dinner, and general donations not related to a particular event. When you purchase the application there is only one donation type listed, i.e. Donation. You might use this type for unsolicited donations. Additional donation types can be added via the Maintenance menu, and you can and should add other types that are meaningful for your organization.

Donation types for a typical user group are:

Donation – As mentioned above, this type is already listed when you receive the database. You can use it for all general donations not covered by the other types you create. (NOTE: you may also want to set up "In Kind" as a Donation Type)

Annual Dinner (yyyy)– You can associate the dinner with a specific year, such as Dinner 2008, or leave it simply as dinner. If you choose the simpler designation, you can associate donation for a specific year by the dates of donations. All donations are entered with specific dates.

Newsletter – Many user groups will send a fund raising envelope with newsletters they send out. This type enables them to track donation form this source.

Annual Appeal (yyyy)– tracks donations from this activity.

Any Special Event – like a bike-a-thon, golf tournament, fashion show, etc., etc. Use the name of the specific event so you can track success over time.

It is important to maintain a certain amount of control over the creation and deletion of donations types. For example, if you delete a donation type, all donations of this type will be permanently removed from the system. Therefore these functions are done via the password protected [Maintenance](#) menu.

Entering Donations

There are two ways to enter donations, via

A) The Main Menu, the “Donations” button

B) The Donations tab on Volunteer, Receiver, Community or Member Congregation forms.

A) When you start from the Main Menu and choose “Donation”, you are presented with the global list of all existing Volunteer, Receiver, Community, and Member Congregations records by Name, Type (Volunteer etc.) and Address of the person or organization to whom the record applies. If a record exists, this makes it easy to find the record without knowing the type of donor (Volunteer etc.). If the person/organization is not on the list, you can create a new record to accept the donation. If you are entering data and have any doubts about whether a donation has already been entered (e.g. you are interrupted while entering donations), you can check the list by returning to the Main Menu and choosing Donations to check the list.

B) If you know that the donor is a Volunteer, Receiver, Member Congregation or someone from the community who has donated previously, you can go to the Donations tab of the specific record and enter the donation from there. When you use this method of entering donations, a donation is added to the record as it is entered making it easy to see whether a donation has already been entered.

Using the Main Menu

Adding a Donation

To enter a new donation, click the Add Donation button at the top of the donations table. This brings up a form with a window at the top that contains the [Global Listing](#), i.e. an alphabetical listing of all records in the Volunteer, Receiver, Community and Member Congregation tables, The list shows the Name for records in the Volunteer, Receiver, and for Individual records in the Community table. For member congregations, it shows the name of the congregation. For Organization records in the Community table, it shows the name of the organization. For an explanation of the difference between Individual and Organization records in the Community table refer to [Entering Data – Community](#).

Next, scroll down the Global List until you find the person or organization that made the new donation. To help with donor identification, the list also shows the table from which the record came (Volunteer, Receiver ,etc.) and the corresponding address.

1. When you have found the donor, select it by clicking to highlight it.
2. Choose the [type of donation](#) from the List Box.
3. Enter the date of the donation or select it from the calendar button by clicking the icon alongside the date field. The default data is today's date.
4. Enter the amount, payment method and any reference notes.
5. Click Add Donation to save the donation.

If a donation appears to be from a Member Congregation or an Organization, and you can't find it listed, check that the record might have been entered differently. For example, a record may have been established previously the Fall River Rotary Club and the new donation may be from the Rotary Club of Fall River.

If there is **no listing in Global List** corresponding to a new donation, click the **Not in List** button, which brings up a blank Community record form. Complete the form and save it. You are then returned to the donation form, select Add Donation and enter the donation for the newly added record. The only option offered for a new unlisted donation is a Community record, since it is assumed that all Volunteer, Receivers and Members are already in the system.

The **cancel** button cancels the donation entry without saving it.

Editing a Donation

To edit an existing donation, click the Edit Donations button at the top of the form, find and highlight the donation to be edited and make the desired changes. Click Save Edit to save the changes or cancel to exit without saving the changes.

Deleting a Donation

To delete an existing donation, highlight the donation on the donation table and click the Delete Donation button at the top of the form. Before deleting the donation, you are cautioned that, once done, the deletion cannot be undone.

Using the Donation Tab

To add a donation, find the donors record from the Main Menu lists. Click the Donations tab, Enter Record, and Add Donation. Enter the Type, Date, Amount, Method of Payment and any reference notes. Click Add Donation to record the donation or Cancel if you do not want to save the donation.

To edit a donation, find the donors record from the Main Menu lists. Click the Donations tab, Enter Record, and Edit/Delete Donation. Make any desired changes to the donation record, and click Save Edit.

To delete a donation, find the donors record from the Main Menu lists. Click the Donations tab, Enter Record, and Edit/Delete Donation. Click Delete to delete the donation.

Soliciting Donations

The database provides a number of features that can be used to support fundraising - activities that are critical to the survival of most interfaith groups. These features include performance reports, donation records, the preparation of personalized fundraising letters and the mailing labels that go with them. This section of CareWorks Help will offer some suggestions concerning how to use the system for some of the fundraising activities typically used by many interfaith groups.

Grants

Grants from foundations are usually a major source of income for most interfaith groups.

Most grantors want to know what you do and how well you do it. They want some kind of quantitative measure of the services you provide. Consequently, **the value of having Volunteers report their service hours monthly cannot be overemphasized**. This is not a popular activity with Volunteers, but it is also not an over exaggeration to tell them that the future of the organization depends on their cooperation. They should be encouraged to send in their monthly timesheet by whatever method suits them best - mail, email, or fax, and the database is ideally suited to take their report over the phone and enter it directly into the timesheet table.

Two reports are of particular value in justifying grant requests: - The Profile Report and the Detailed Reports of Services Rendered.

The Profile Report summarizes all of the key statistics for your organization for whatever time period you specify. For Receivers, it gives their total number, gender and age distribution, what percent are low income, their ethnic distribution, mobility and the sources of their referral. For Volunteers, it gives their total number, gender and age distribution, and a summary of services rendered by type of service. And the report finishes with a brief financial statement.

Whereas the Profile report presents a succinct summary of your operations, the Detailed Report of Services Rendered gives the full details, for the selected time period, of exactly what services were provided for and by whom and for how many hours. Separate reports are provided for services rendered to Receivers and services rendered by Volunteers. There are several versions of each report some giving the actual names of Receivers and Volunteers and other showing ID numbers only in order to protect the identity of the individuals should this be thought necessary.

Whereas the above reports many not meet exactly the specific requirements of some grantors, much of the data they do require can usually be extracted from the reports and represented in the grantor's format. Programs with MS Access on their computers can design their own reports and queries using data from the CareWorks database.

If you are a new interfaith group, you will want to get started with fundraising from day one, so begin using the database early i.e. entering Volunteer and Receivers and their service hours. You should then be able to produce the above reports with meaningful data after six months of operation.

General Fundraising Events

Most interfaith groups will have at least one major fundraiser annually: - a dinner, walk-a-thon, golf tournament, etc. The database mail merge and mailing label features can be used to write and send invitations to these events. Mail merge is set up to create personalized letters to the following separate groups; Volunteers, Receivers, all records in the Community table, Member Congregations, and selected classifications that you set up specifically for your group.

Depending on the nature of the event you might not necessarily want to include all of the above groups in an invitation. For example, you might not want to invite Receivers to a relatively expensive fundraising dinner. Also, consider the Community table which frequently lists a broad mixture of individuals and organizations in the community that are of interest to your organization. Among them there may be some to whom you would not be comfortable sending a fundraising invitation. You can handle this in two ways: - you can establish a classification, for example "Annual Dinner", and assign it to those in the Community table that you want to invite, then do the mail merge and mailing labels to this selected class; or you can check the Don't Mail box in those records

you don't want included which will automatically exclude them for the mail merge and mailing label preparation.

You can, of course, sacrifice the personal touch by using a simple standard form letter for solicitations instead of a personalized mail merge letter.

Following the event you can use the database to send thank-you letters to those who attended.

Annual Appeal

You can use the same approach described above for General Fundraising Events to an Annual Appeal.

Newsletter

You may want to set up a separate Classification for "Receives Newsletter" that could be used for Receivers, Volunteers, Community Members and Congregations. Then, when you want to send out the Newsletter for informational purposes or to solicit funds, you would choose that "Selected Class" from the Mail Merge portion of CareWorks to generate mailing labels or even individualized letters. Many groups enclose a donation envelope with their newsletters. You can also send individualized thank-you letters from the database to those who contributed on your program's letterhead with the giver's name, the donation type and the amount received.

Targeted Solicitations

You can use the Donor Master Report to target specific individuals or organizations according to how much they have contributed to your program. For example, you can separate your donor base into two groups: - those who have contributed less than \$200 and those that have contributed \$200 or more over the past three years. You might call personally on the larger givers and use a Telethon approach with those who in the lower group. The database provides for printing out an individual record for each donor with space for recording the results of any contact made and appropriate follow-up.

Preparing and Using Reports

The contents of this section of the Help menu are presented under the following headings which may be accessed by clicking the + sign next to the heading at the left or by clicking one of the links below:

[General](#) – a brief description of the reports produced by the database.

[Preparing a Report](#) – The steps involved

[Printer Margin Problems](#) – Technical Support

[Report Dates](#) – a description of the two formats that are used in specifying the date ranges of reports.

Reports are then organized under the following eight Report Categories:

[Assignments](#)

[Donations](#)

[Miscellaneous](#)

[Profile](#)

[Receivers](#)

[Schedules](#)

[Services](#)

[Volunteers](#)

General

The system produces a wide variety of reports containing information about Volunteers, Receivers, Member Congregations and individuals/organizations in the Community at large. Also included are reports of donations, lists of various classes of individuals such as Congregational Coordinators, summary reports of services rendered (in total, by congregation and in graphical form). A Profile Report summarizes in two pages many of the key statistics about the coalition such as the number and age distribution of Volunteers and Receivers, hours and type of services rendered, ethnic distribution of Receivers as well as staffing and financial information. There are several reports that provide full details of services provided to Receivers and by Volunteers – these are generated from Timesheet entries.

Preparing a Report

To prepare a report, click the Reports button on the Main Menu. This brings you to the Report Selector where you are offered a list of eight **Report Categories**. Click the category you want and select a report. Then look at the bottom of the screen. You may be asked to select certain criteria for the report, like a date range for the report. You can then preview the report on the screen or cancel the report. Previewing a report on the screen can provide the information you need without printing a report, and it enables you to catch errors in the output and correct them before printing. To print the report, with the report on the screen, click The Printer icon on the toolbar. When the report is printed, click the Close button on the toolbar which returns you to the Report Selector. Click Cancel to return to the Main Menu.

Printer Margin Problems

When you print reports you may encounter problems with margin settings. For example when printing a Master Receiver Report, you may find that the left margin is too wide which causes some lines in the title or footnotes to run onto a second page. This introduces additional pages such that what would have been page 1 is spread over page 1 and page 2. To correct this problem, call [Technical Support](#) to change the margin settings for the report.

Report Dates

Many reports are based on specific date ranges in which case you are asked to provide a **From Date** and a **To Date**. Some reports only ask for month and year for the From and To Dates. Other reports, for example the Profile Report, various donation reports, and Services Rendered reports are based on full Month/Day/Year dates and, accordingly, these reports ask for full From and To Dates.

To accommodate those user groups that do not require their Volunteers to submit timesheets, provision has been made so that some reports (e.g. Master Volunteer and Receiver reports) that are normally based on Month/Year From and To Dates can be run without these dates being entered. In this case the Hours column will be blank, but the reports will still provide the user with useful information e.g. phone numbers, availability, services offered etc.

Reports of Permanent Assignments

The database produces the following reports of Permanent Assignments which are the summation of permanent assignments made via the subforms in the Volunteer and Receiver records:

Permanent Volunteer Assignments lists the Volunteer's (name, ID # Congregation), the congregation assigned to provide the service (usually, but not always, the same as the Volunteer), and the Receiver (name, ID# and Congregation) to whom the Volunteer is assigned, as well as the Date Assigned. The report can be run for all Volunteers or separately by congregation for distribution to coordinators.

Permanent Receiver Assignments- the same information as above, but organized by receivers. Can also be run by congregation.

The topic on [Permanent Assignments](#) discusses the methods for making permanent assignments.

Donation Reports

The **Master Report** produces, for any selected time period, a list of those donors whose total donations are between a range that you specify. For example, you can ask for a report for the time period 01/01/08 to 12/31/08 of all donors who made total contributions of over \$200 (lower limit \$0, upper limit \$200). Another example - you can break out donors for the same time period into two groups; those that gave between \$0 and \$199.99 and those who gave over \$200. As a fund raising strategy you might call personally on the top group and focus a phone-a-thon on the lower group. Note that the lower group is \$0 to \$199.99 not \$0 to \$200 which would place those who gave exactly \$200 in both groups. To include all donors in the top group, enter None as the upper limit.

Donation reports include a unique ID # for each donor that combines the ID# of the individual with the table from which the donor comes by preceding the ID# of the individual with the letter C, R, V for Community, Receiver and Volunteer tables. For example V1 is Volunteer ID#1, C12 is Community ID# 12. Member Congregations are identified by their unique three-character ID code.

After preparing the Master Report, you can prepare a **Report of all Donations from Each Individual** for each person included in the Master Report. These Individual pages provide, for example, those who are contacting donors with a detailed record of the donor's giving history. Note that the Individual Donor pages include all donations by the donor, not just those covered by the date range of the Master Report. The total number of pages involved when you choose Print Individual Pages can be quite large since each donor is reported on a separate page. For this reason you may want to specify print ranges and print pages in groups of 50 or 100 in case you experience printer problems with large print batches. Obviously, you should not print Individual donor pages unless you have a fundraising strategy that can utilize this information. The Individual Donor pages are laid out to make pencil entries for recording solicitation notes as the solicitation progresses.

Note that the Individual Donor pages go with a specific Master Donor Report, so you need to prepare the Master Report first. Also note that, if you target different groups for different dollar ranges as described above, the reports must be processed in the order indicated, i.e. first, prepare the Master Report for \$0 to 199.99 then print Individual Pages for this range. Next prepare the Master Report for \$200 and higher and prepare individual donor pages for this range.

The **List of Donations from Selected Donor** (as opposed to the individual donor page described above) provides a list of all of the donations made by a specific donor for the data range you specify. Donors may use this report to support income tax deductions.

For the **Summary of Donations By Specific Type** you select the donation type (e.g. Dinner2001, Newsletter, etc.) and a date range. The report lists donation for the type in date order.

The **Summary of Donations by Date** lists all donations for the time period specified for the report.

[Soliciting Donations](#) offers suggestions on fund raising.

Miscellaneous Reports

The **Program Data** report is a print of the form used in Maintenance – Program data. It includes the fixed data for your organization, such as name, address, financial information etc. that are used to provide these data for Profile Report.

Other reports included under miscellaneous are as follows:

Individuals and organizations in the **Community** table are listed by three sort orders: - name, organization, and ID number. Useful for connecting contact names with the organizations from which they come.

The **List of Selected Class** prints out a list of the specific Classification that you select from the drop down box. For example, if you have created a class called Coordinators, and select this class from the list, the program prints out the list of your Coordinators with their addresses and phone numbers.

Service data for all volunteers can be prepared in the form of a **Pie Chart of Services** that is frequently used in newsletters and similar publications. Note that administration services are not included in the pie chart since it is intended to position direct services to receivers. The chart identifies services by a color legend. This will not be suitable if you don't have a color printer or want to use the chart in a black and white environment, for example a newsletter. If you have MS Excel on your computer you can easily prepare a pie chart with services identified by labels instead of colors. Prepare the Service Summary for all volunteers for the desired period and enter Services in Column A and Hours in Column B of a spreadsheet. Use the Chart Wizard to prepare a pie chart choosing Show Labels and Percent for Data Labels.

This topic also includes the following lists:

Classifications (the list of classes you create e.g. coordinators, trustees, etc.)

Careteams (the names of the careteams you create to serve your receivers)

Donation Types (descriptions that fit your organization, e.g. fund raising dinner, newsletter etc.)

Locations (the locations you create that suit the particular needs of your group)

Member Congregations (the list of coalition members as recorded in your Member Congregations table)

Referral Sources (standard referral sources plus those subcodes you create corresponding to your local needs)

Services (the standard list of services e.g. visiting, transportation plus those subcodes as needed by your group)

Services and Congregation Codes (an explanation of the codes used in many reports)

Profile Report

THE PROFILE REPORT IS ONE OF THE MOST POWERFUL OUTPUTS OF THE SYSTEM. It summarizes in two pages many of the key statistics about your program. It should prove valuable in positioning the work of the program to the Board of Directors, community supporters and potential funding sources. Many of the data are also useful for new grantee reporting. Not all data in the report may be relevant to a specific use, therefore the report has been laid out so that you can white out those sections that may not apply.

The Profile Report contains two types of data. First there are the data that can be derived from the database such as the number and age distribution of Volunteers and Receivers, hours and type of services rendered, and ethnic distribution of Receivers. The second type is data that are not part of the regular database and must be entered specially for this purpose in order to complete the report, such as the name and address of the program as well as staffing and financial information.

These data are entered in the form that comes up when you choose Program Data from the Maintenance button on the Main Menu and are discussed later under this topic.

Except for the data entered via the Program Data form, all of the remaining information summarized in the report is extracted from existing tables without additional input. However, it is important to recognize that the report is only as complete as the data entered. For example, if you have 100 Receivers (Total Receivers), but have referral source entries for only 20 (the Referral Count), you don't have a very reliable figure for the referral source of Receivers. Note that the percentages listed for the various distributions (age, ethnic origin, etc.) are percent of the group, not percent of the total. In the above example, the percentages are percents of the group count of 20 totaling 100% and not percents of the 100 total Receivers.

It is important that the dates on which Volunteers became Inactive and Receivers were No Longer Served be entered in the corresponding date fields (following the Status field) of the Volunteer and Receiver forms. The same is true for the dates when Volunteers started (the Date Training Completed field) and Receivers came into the system (Date of Initial Call). Without correct entries in these fields, the program does not know whom to include or exclude from the report.

******Although the program permits you to specify any time period for the Profile Report, certain information in the report is always current, not retroactive, data. The report gives current data, regardless of the time period for the report, for the following: Community, Services Provided, and Financial Information. Thus, if you run a report for 2007 in 2008, this data will be for 2008. All other data (number of Receivers and Volunteers, service hours and distribution, age distributions etc.) are for the period specified. Note that, if no date is entered in the Date Entered field of a Member Congregation, the program includes the congregation in the report regardless of the date range of the report.******

Receiver Reports

The following reports are available in this category: Master Reports, Individual Reports, Years of Service, Birthdays, Receivers No Longer Served, and Receivers on the Waiting List.

Master Receiver Reports – These reports provide comprehensive listings of all Receivers, their ID number, phone number, activity status, congregation, map location, number of hours they have reported for the time period of the report, and the services they have requested. The report also totals the number of Receivers and Hours for the specified period.

The report includes all Receivers who are currently Active, On Hold, and on the Waiting List whether or not they have received services for the time frame of the report. A blank in the Hours column of the report indicates that no activity has been reported for this Receiver for this period.

The reports may be sorted in a variety of ways useful for different purposes: - by the Receiver's name, congregation, position on the map (map coordinates), ID number, Zip code, Careteam, and location. Congregations may be printed separately for distribution to coordinators, and reports may be prepared for single congregations and locations.

These reports, along with the Master Volunteer Reports, are probably the most frequently used reports produced by the database. They are a quick reference source to just about all the Receiver information you need. Their uses are myriad: a quick reference for office staff who do not have access to the computer (find a phone number, Receiver's congregation, etc.), distribution to

coordinators to help keep their records straight and find a Receiver who needs a specific service, reporting to congregation heads about the activities performed for their Receivers, etc. etc.

Some of the information (Status, Congregation, and Services requested) in the master reports has been coded in order to fit the data on one line. Codes for Status, and Services are explained in footnotes on each page. Codes for Congregations and Service Subcodes can be printed out by choosing Reports/Misc. from the Report Selector.

The **Receiver's Individual Record** lists the services provided for the Receiver for the period of the report including the name of the Volunteer, their congregation, date and type of service, hours and miles reported in the service of this Receiver. The report basically answers the question; "What have we done for this Receiver lately?"

Receivers by Years of Service lists the years of service for each Receiver since the date of their initial call for service. This does not include Receivers No Longer Served.

List of Receiver Birthdays (with Addresses) Some organizations send birthday cards to Receivers. This does not include Receivers No Longer Served.

Report of Receivers No Longer Served lists all Receivers no longer served. Recall that Receivers No Longer Served are not included in the master reports. Two sort options are offered: - by Receiver name and by congregation.

Receiver Waiting List includes all those Receivers whose Status is Waiting List.

Reports of One-Time Scheduled Assignments

The **Master Services Schedule** lists on one line the name of the Receiver, their phone number, service requested, the date scheduled, the congregation to whom the Receiver is assigned, the name of the Volunteer, who made the assignment and whether the assignment has been confirmed with the Receiver. Blanks in the assigned Congregation and Volunteer columns are unfilled requests.

The **Detailed Services Schedule** is an expanded version of the Master Schedule. It includes the time the service is to be provided, phone numbers for both Receivers and Volunteers, and the first line of the Detailed Instructions (the full instructions can be viewed in the Volunteer and Receiver forms). This report is most frequently used, but the greater detail makes it a long report if your group is heavy on scheduled services.

In addition to providing the office with a mechanism for managing volunteer scheduling, they are also useful as a basis for periodically removing completed assignments from the system.

The topic on [One-Time Scheduled Assignments](#) discusses the methods for making scheduled assignments.

Service Reports

The following reports are available in this category: Service Summary, Number of Times Services Were Performed, Mileage, and Detailed Service Reports.

The **Service Summary Report** lists the hours reported by the Volunteers by service category. The report relates to a specific time period, and you are asked to enter From and To Dates using the Calendar button. Total Hours for the period are shown at the bottom of the page. The report may be prepared for all volunteers, or it can be sorted by congregation, location or careteam.

The reports are a simple, succinct summary of services rendered. They are useful in discussions with member congregations concerning the kind of support they are receiving. They can be used to support grant applications relating to a specific geographic locations. The breakdown by careteam allows an analysis of careteam activity. The service data for all volunteers can also be prepared in the form of a **Pie Chart of Services** that is frequently used in newsletters and similar publications. Note that administrative services are not included in the pie chart since it is intended to position direct services to Receivers. For more on the Pie Chart refer to [Reports Misc](#).

While the above reports give the hours that each service was performed, a similar set of reports is offered for the **Number of Times Services Were Performed**. They answer the question "How many times did you perform this service?" The same sorts are provided as for the Service Summaries.

There are two **Mileage Reports** that list the total miles that each Volunteer reported during the time period of the report. One report lists **Transportation Miles Only**, i.e. the number of miles that a Volunteer drove in providing transportation to a Receiver. The second report lists the **Total Transportation Miles** i.e. the total number of miles that a Volunteer drove in providing all services to a receiver, not just the transportation miles. These reports may be of value where a grantor provides funds to cover volunteer transportation.

Lastly, there is the **Detailed Reports of Services Rendered**. These cover services provided by Volunteers and services rendered to Receivers. These reports supplement the Services Summary reports mentioned above and the [Profile Report](#) that is covered separately. They provide the ultimate detail of exactly what services were provided by and for whom. This is the kind of information sometimes required by a grantor in a given agency or geographic location that wants full details for grant support. The reports are offered on four sort bases: By Name, ID # Congregation and Location. The report by ID number is intended to protect the confidentiality of the individuals involved where this is considered desirable. Service information comes from TIMESHEET entries.

Volunteer Reports

The following reports are available in this category: Master Reports, Individual Reports, Years of Service, Birthdays, Inactive Volunteers, and Driver's License and Insurance Expiration Dates.

Master Volunteer Reports – These reports provide a comprehensive listing of all Volunteers, their ID number, phone number, activity status, congregation, map location, number of hours they have reported for the time period of the report, their availability and the services for which they have volunteered. The report also totals the number of Volunteers and Hours for the period.

The report includes all Volunteers who are currently Active, On Hold, and In-Training whether or not they have reported services for the time frame of the report. A blank in the Hours column of the report indicates that the Volunteer has not reported activity for this period.

The reports may be sorted in a variety of ways useful for different purposes: - by the Volunteer's name, congregation, position on the map (map coordinates), ID number, Zip code, and location.

Congregations may be printed separately for distribution to coordinators, and reports may be prepared for single congregations and locations.

These reports, along with the Master Receiver Reports, are probably the most frequently used reports produced by the database. They are a quick reference tool to just about all the volunteer information you need. Their uses are myriad: a quick reference for office staff who do not have access to the computer (find a phone number, volunteer's congregation, etc.), distribution to coordinators to help keep their records straight and find a volunteer for a needed service, reporting to congregation heads about the activity of their volunteers, etc. etc.

Some of the information (Status, Congregation, Availability, and Services offered) in the master reports has been coded in order to fit the data on one line. Codes for Status, Availability and Services are explained in footnotes on each page. Codes for Congregations and Service Subcodes can be printed out by choosing Reports/Misc. from the Report Selector.

Note that, if a Volunteer has offered a long list of services such that the services string (e.g. 1-2-4) is too long to fit in the Services column, the string ends with the **overflow symbol >** to indicate that the string exceeds the width of the column. To see the full list of services offered, you can pull the Volunteer record from the Global Listing

The **Individual Volunteer Report** lists the services provided by the Volunteer for the period of the report including the name of the Volunteer, their congregation, date and type of service, hours and miles. In addition to answering the question; " What has this volunteer done recently? ", the report, when run for a full calendar year, can form the basis for taking an income tax deduction for miles driven for those volunteers who itemize deductions.

Volunteers by Years of Service list the years of service for each Volunteer since the date their training was completed. This is useful for service awards. This does not include Inactive Volunteers.

List of Volunteer Birthdays (with Addresses) Some organizations send birthday cards to Volunteers. This does not include inactive Volunteers.

Report of Inactive Volunteers lists all inactive Volunteers. Recall that inactive volunteers are not included in the master reports. Two sort options are offered: - by Volunteer name and by congregation.

Driver's License and Insurance Expiration Dates This menu choice offers four report options; - A) Drivers License Expiration Dates - All Volunteers, B) Drivers License Expiration Dates – Transportation Volunteers, C) Drivers Insurance Expiration Dates - All Volunteers, D) Drivers Insurance Expiration Dates – Transportation Volunteers.

Options B and D track only those volunteers who volunteered to provide transportation on the assumption that only they will provide transportation. This involves a clear understanding with Volunteers that they will not provide transportation unless they volunteered to do so. Options A and C make the broader assumption that any Volunteer may at some time provide transportation whether or not they actually volunteered to do so.

Using the Reports

The database system can produce a total of over 70 reports - many more than you will want to print out routinely. The preferred way to use the system is to obtain the information you want, as much as possible, by viewing reports on the screen. This avoids producing unnecessary paper and ensures that you are looking at the latest available data, rather than a paper report that may be several weeks old. Unfortunately, the computer may be in use for other purposes when you want to use it, so instant access is not always possible. As you learn about the system and its capabilities, you will develop your own plan for printed reports. The key reporting capabilities can be summarized as follows:

The Master Volunteer Reports give a variety of information about the Volunteers and tells you how many hours they have reported according to timesheet entries.

The report of Permanent Volunteer Assignments and Schedule reports tell you who is assigned to care for whom. They allow for assignments in which more than one volunteer cares for a Receiver and more than one Receiver is cared for by one Volunteer.

The Master Receiver Reports tell you how often Receivers from specific congregations are being cared for in terms of total hours reported.

Individual Volunteer and Receiver reports give detailed service records for individuals.

The various Service reports, including the Profile Report, summarize relevant statistics about the organization.

The following is a monthly reporting schedule that you might consider:

A) Master Volunteer Report-By Name. This report provides a comprehensive listing, sorted by name, of all Volunteers, their ID number, phone number, their activity status, congregation, map location, the number of hours they have reported for the time period of the report, their availability and the services for which they have volunteered. The report includes all Active, On Hold, and In-Training Volunteers and reports the total number of Volunteers and total Hours for the period. We suggest that it be run for the most recent three month period which is long enough to include hours for those who may have missed a reporting month and recent enough to be current.

B) Master Volunteer Report-By Congregation. Same content as A) above but sorted by congregation. Useful to locate those congregations and volunteers who appear to be available according to their timesheet reporting.

C) Master Volunteer Report by Map Coordinates. Useful in locating Volunteers who live near the location of a specific Receiver.

D) Master Volunteer Report – By Congregation – Separately. Provides the same information as A) above except separated by congregation. Useful for distribution to Coordinators to help them keep their records up to date.

E) Master Receiver Report. This report lists all Receivers alphabetically, their ID and phone numbers, status, the number of hours that have been reported for them for the indicated period, the number of Receivers and total hours.

F) Master Receivers Report – By Congregation - Separately. Provides the same information as E) above except separated by the congregation of the Receiver. Note that the hours in this report are

the total for each Receiver and may be from Volunteers in congregations other than that of the Receivers. This report is useful for reporting to the Coordinators and Heads of Congregations what is being done for the members of their congregation from the entire coalition not just by their own Volunteers.

G) Receiver Assignment Report. This report lists Receivers alphabetically, the congregation to which they are assigned, and the Volunteers who are assigned to them regardless of whether or not they come from the congregation to which the Receiver is assigned. It represents the summation of the Volunteer Assignment Tables for all Receivers.

H) Receiver Assignments by Congregation. This report shows the assignments of Receivers by the congregation to whom they are assigned. It helps Coordinators keep track of the Receiver Assignments. Note the difference between this report which organizes Receivers by the congregation to which they are assigned and F) above which organizes Receivers by the congregation from which they come.

It is recommended that the Profile report be run as needed, but at least at the end of each calendar year after updating the system as discussed under Profile Report.

Mail Merge, Thank You Letters and Mailing Labels

For more information on these features click the links below:

[Check Your Printer First](#)

[Mail Merge & Mailing Labels](#)

[Thank You Letters and Mailing Labels](#)

Check Your Printer First

Although the program has been successfully tested on a number of printers, it is recommended that you run a test on your printer before printing labels. To test your printer select a Mailing Type for which you have at least 20 records, for example Volunteer or Receivers, and print out a page on **Avery 5161 (for laser jet) or 8161 (for Ink Jet)** label stock .

Examine the positioning of the printing on the labels. The distance from the top of each label to the top of the first printed line should be identical on each label as you move down the page. If the distance increases as you move down the page, it is likely that a label with four lines will not fit on the label as you approach the bottom of the page. In this case your program needs to be adjusted to print correctly on your printer. Contact [Technical Support](#) to adjust the program.

Mail Merge & Mailing Labels

Clicking the **Mail Merge** button on the Main Menu takes you to the **Mailing Type Selector**. Here you can choose what **Type of Mailing** you want to do (Volunteers, Receivers, etc.) and what **Type of Output** you want – either a personalized mail merge Letter or mailing Labels. Personalized form Letters and Mailing Labels are offered as part of the same function because generally they go together. You will want labels to mail the letters. You can, of course, print only labels, for example, to send out a standard letter, as opposed to a personalized merge document.

Preparing a Mail Merge Document

The standard method of preparing a personalized Mail Merge document in MS Word involves creating a main document, establishing a data source, deciding which fields to place in the main document and where to place them, then printing the merged document. CareWorks uses a much simpler approach. You decide which class of records you want to merge (Volunteers, Receivers, etc.) and CareWorks presents you with a document template with the merge fields correctly placed. All you have to do is insert your text in the template.

1) When you **click the Mail Merge button on the Main Menu**, a message comes up suggesting you first read this Help topic if you are not familiar with the mail merge feature. You are next presented with the Mailing Type Selector. You can **choose** to prepare a merge document from any **one of the following seven Mailing Type** choices:

- Volunteers (all except Inactive)
- Member Congregations
- Community
- Receivers (all except No Longer Served and Waiting List)
- Thank You Letters
- Selected Class (Classification)
- Selected Careteam

After you have selected a mailing type:

2) Click Letters and then Create Merge Document. This opens the merge document with the appropriate fields placed as follows:

```
<<Title>> <<FirstName>> <<LastName>>  
<<Address1>>  
<<Address2>>  
<<City>>, <<State>> <<Zip>>
```

Dear <<Salutation>>,

The fields are laid out to place the data correctly in your mail merge letter. **Do not delete or modify the placement of the fields as shown above.** If you accidentally change the fields, click Close and start over again. Note that for some Mailing Types e.g. Community, the field layout will be modified to also include <<Position>> and <<Organization>>.

Whenever a record contains a blank field (e.g. Title, Address2, Position), the field is suppressed in the merged document. This suppression of blank fields is also the reason that the Salutation field is required in all records, since without a Salutation entry the merged letter shows a blank for this field i.e. it would read Dear , . Also note that you don't have to add the comma after the City and at the end of the Salutation. They are included in the template.

- 3) Replace the "Body of the letter"** with whatever text you want to send to the selected group. For example, for Volunteers you might be sending an invitation to an annual recognition dinner, a fund raising letter to all in the community table, or an invitation to the annual general meeting to all Member Congregations.
- 4) When you have finished inserting the appropriate text, click Tools on the tool bar, then Mail Merge.**

5) In the Mail Merge Helper, go directly to Step 3 and click Merge (CareWorks completes steps 1 and 2 automatically)

6) Finally, on the next screen leave all options (new Document, etc) unchanged and click Merge to prepare the merged documents.

7) To print the merge documents, **click File-Print**. It is suggested that you first print one or two pages to check the layout e.g. that the margins fit with your letterhead, etc. Note that the entire document may be 1 page separated into sections. If this is the case, select Pages s1 – s2 to print the first 2 pages.

The above procedure applies directly to the first four mailing types: - Volunteers, Member Congregations, Community, and Receivers. When you choose Selected Class as a Mailing Type, you are presented with a list of classifications from which to choose the class you want to do the mail merge, for example Coordinators. Similarly for Selected Careteam, you are asked to select a Careteam from the list. Then follow steps 2) – 6) above.

8) After printing the merged documents, you might want to save the Form Letter document in case you find errors in the printed letters that you want to correct. After sending the merged documents, it is a good idea to delete the saved Form Letter document so as not to confuse it with any new merged documents.

It is recommended that you not save the main document (the one that shows the field placement) since it cannot be used without being connected to CareWorks.

9) When you have closed the above documents, **exit from MS Word**.

For repetitive letters, e.g. acknowledging a donation, thanks for attending the annual dinner, invitation to volunteer recognition event, etc. you might find it helpful to create a series of standard letters and save them with names like Thank You – Donation, Thank You – Annual Dinner, Thank You – Recognition Dinner. You can then copy and past them into the Main Document for new mail merge documents.

Preparing Thank You Letters and Mailing Labels is covered in a separate topic – [Thank You Letters and Mailing Labels](#).

Preparing Mailing Labels

When you exit from Word, you are returned to the Mail Type Selector. You can start the preparation of labels for your merged documents directly from here or you can close and return later to prepare labels.

CareWorks is set up to print on 1" X 4", 2 across labels – 20 per page. **Avery** (800-462-8378) **labels 8161** labels for ink jet printers and **5161 for laser jet printers** are recommended.

CareWorks labels have been designed to meet US Postal Service specifications. They use a size 10 print (font) in capital letters. We have chosen a large 4 inch label to accommodate as far as possible long entries which occur particularly with the names of congregations and organizations.

Careworks uses proportional fonts as do most databases and word processors. Proportional fonts take into account that some letters take up less space than others, e.g. an i takes up less space than a w. Squeezing the letters together makes it possible to get more characters in a given space. However, it does mean that the number of characters on a line of given length, as in a label, will vary depending on the characters involved. The following lists the maximum number of characters that may occur on the various lines of a five-line (member congregation and community) label. The actual number of characters that a line may accept will depend upon the characters involved and may be less than indicated below, In any case, if the number of characters exceeds the width of the

label, the characters are cut off where the line ends. Thus, it pays to be aware of this limitation and keep field entries reasonable in length in order to ensure a well laid out label.

Line 1) Title + First Name + Last Name. The sum of the three fields is limited to 36 characters even though you can enter more characters than this in the corresponding form fields. If you exceed the 36 character limit, the program shortens the First Name to the Initial.

Line 2) Organization in the Community and Member Congregation labels. Limited to 35 characters.

Line 3) Address Line 1. Limited to 35 characters

Line 4) Address Line 2. Limited to 35 characters

Line 5) City-State-Zip. It is important to limit the size of the City field to 18 characters including spaces in order to avoid the risk of pushing the zip off the right edge of the label. Have a look at labels when they are prepared and are being applied to pick up any in which the zip has run off the right edge. This will happen very rarely and only if the city entry is too large.

If you have just finished a mail merge, prepare your printer to print labels, select Labels from the Mail Type Selector and click Create Labels, close the Mail Type Selector and print the labels.

If you encounter printer problems while preparing a large number of labels, use the [navigator bar](#) at the bottom of the label page to identify missing pages and specify them in the printer page range.

The program sorts labels by Zip (for postal bulk mailings) and Last Name within Zips.

When finished printing labels, click Close on the Tool bar to return to the Main menu.

You can, of course, print labels independently from mail merge by clicking Mail Merge/Mailing Labels from the Main Menu, selecting a Mailing Type, clicking Labels, then Create Labels.

Thank You Letters & Mailing Labels

Preparing a Mail Merge Thank You Letter

Choosing **Thank You Letters as the Mailing Type** from the Selector allows you to prepare personalized thank you letters to donors including the type of donation and amount donated. It is designed to prepare letters to groups of donors identified by the type of donation they made, e.g. Dinner2008, and the date or date range of the donations.

After choosing Thank You Letters as the Mailing Type, click Letters as the Output Type, then choose the Donation Type and the date range (From Date and To Date) of the donations for which you want to prepare Thank You letters. CareWorks then prepares a report for this donation type and date range and bases the mail merge on this report. Click Output Report to see the report. You can click on the title bar of the Mailing Type Selector and drag it out of the way if necessary to see the full report. Click the printer icon on the tool bar to print the report, and click Close to close it.

Obviously, you must first enter donations in the database (refer to [Entering Donations](#)) according to their type and amount before you can send Thank You Letters. Donation types for your particular group are established via the Maintenance topic [Other Tables](#).

It is important that you choose the donation type and date range for the mail merge carefully. Here are some examples:

1. You are preparing thank you letters for the 2008 fundraising dinner that was advertised on February 1 and took place on February 25. You think most donations have been received by March 15. You enter 02/01/08 as the From Date and 03/15/08 as the To Date. Any donations received after 03/15/08 will not be included and should be the subject of a separate mail merge run later for a later date range.
2. You send out a newsletter on May 1, 2008 with donation envelopes and decide to send thank you letters for all donations received as of May 31. You have established a Type for Newsletter and entered donations accordingly. For the mail merge, choose Newsletter for Donation Type, 05/01/08 for the From Date and 05/31/08 for the To Date.

The mail merge feature of the database is ideally suited for bulk mailing of thank you letters following a particular event like a fund raising dinner or newsletter mail out. It can, however, also be used for individual thank you letters by entering the date the donation was recorded as both the From and To Dates. If more than one donation has been recorded for that date, the program will produce letters for all donations on that date.

Because receipt of donations may follow an erratic pattern, e.g. heavy after a major fundraiser or scattered over time for unsolicited donations, it is a good idea to assign one person in the office to enter donations in the database and to prepare and record thank you letters.

After you have entered the Donation Type and From To Dates, click the Output Report button.

This brings up the report on which the mail merge will be based. Click the printer icon on the tool bar to print the report and Close to close it. (File the paper copy of the report so you will have a record of letters sent.) To prepare the mail merge documents, follow the same steps as described previously in the [Mail Merge & Mailing Labels](#) topic i.e. click the **Create Merge Document button**, and enter your text for the letter. Note that the merge process places the Donation Type ("event") and donation amount in the draft text. If the Type does not fit the style of your letter you can delete it and type in whatever you want. For example if the Type is Dinner2008, you may want to substitute Our 2008 Fund Raising Dinner. When the text of the letter is as you want it, click Tools, Mail Merge, and Merge and Merge again to prepare the merged documents, and print them.

To print the merge documents, click File-Print. It is suggested that you first print one or two pages to check the layout e.g. that the margins fit with your letterhead, etc. Note that the entire document may be 1 page separated into sections. If this is the case, select Pages s1 - s2 to print the first 2 pages.

When printing is complete, close the Word documents, and exit MS Word.

Preparing Labels for Thank You Letters

Since Mailing Labels for your merge documents are prepared from the data in the report you prepared above, you should begin the preparation of label for thank you letters following the printing of the merge documents.

When you exit from Word, you are returned to the Mail Type Selector and you start the preparation of labels for your merged documents directly from there. Prepare your printer to print

labels, then select Labels from the Mail Type Selector, click Create Labels, then close the Mail Type Selector and print the labels.

If you encounter printer problems while preparing a large number of labels, use the [navigator bar](#) at the bottom of the label page to identify missing pages and specify them in the printer page range.

The program sorts labels by Zip (for postal bulk mailings) and Last Name within Zips.

When finished printing labels, click Close on the Tool bar to return to the Main menu.

If you are not able to prepare labels for Thank You Letters at the time the letters are prepared, then click the Mail Merge/Mailing Labels button on the Main Menu, select Thank You Letters as the Mailing type, select Labels as the Output Type, **enter the Donation Type and From To dates exactly as you entered them for the preparation of the Thank You letters**, click Create Labels and print the labels. Compare the labels with the corresponding letters to be sure they are correct.

CareWorks is set up to print on 1" X 4", 2 across labels – 20 per page. **Avery** (800-462-8378) **labels 8161 labels for ink jet printers and 5161 for laser jet printers are recommended.**

The Classification Field

There are four basic tables in CareWorks that record information about people. These are the Volunteer, Receiver, Community and Member Congregations. Working with these tables, the program prepares a variety of outputs, for example, reports, mailing labels, mail merge documents etc. However there may be other classes of people of interest to your Program within and across these four basic tables. It would be helpful to be able to prepare a list, mailing labels and mail merge documents for the Congregational Coordinators that is a class within the Volunteers table. Similarly the Trustees or Directors of the Program are another classification that can span all four tables.

The CLASSIFICATION field offers a way to access these additional classes of individuals across all four tables. You decide which classes are important for your organization and add them to the Classification list via [Maintenance-Other Tables](#) then enter this class in the classification field for each individual in the class.

The Classification field offers you a powerful way to tailor the system to your needs, however it does require a certain amount of discipline to keep it orderly and meaningful. Here are some suggestions:

1. Before you set up a Classification, think about how you want to be able to pull information out of the database. Do you need to identify a particular population? Perhaps you want to attempt to get funding from the Alzheimer's Foundation. You can classify all the the Receivers that you serve that currently have Alzheimer's and present the list to the foundation. Does a youth group from the local high school work as Volunteers on a part-time basis? You need to be able to identify them as special Volunteers when the high school asks for a list or you want to honor them at your Annual Dinner.
2. There are only 35 different possible Classifications at this time (A-Z, 1-9). So you may need to remove classifications from the Classification fields and the Classification list when they are no longer needed. For example, if you have assigned a class Special to those who are receiving a one time Special mail out, delete the class from the list and the individual records when the mail out is done.

Since it requires vigilance and continuity to maintain the Classification system in good working order, it is suggested that some one person be assigned the responsibility for creating new classifications, deleting classifications and generally maintaining the system. **Note that, in order to ensure discipline in this area, creating new, changing and deleting classifications are protected functions accessed via the password protected Maintenance menu.** However, a list of current classifications may be viewed or printed from Reports/Misc.

To add/remove a classification, go to Maintenance, enter the password, click on the Classification tab, go to the line you want to Edit or Delete and highlight it, then click on your delete button. If you want to add a classification, go to the last record, key in the Classification and then assign a one digit alphanumeric code that hasn't already been used. Click on the Main Menu to save your work.

Although you will want to develop your own classes that relate to your particular Program with its own interests and activities, here are a few common ones to start with:

Coordinator
Trustee/Board of Directors
Development Committee
Receives Newsletter

****Some groups get funding from the United Way which requires an income breakdown more detailed than CareWorks provides. These groups have set up Classifications for the different income brackets of their Receivers and then report to the United Way how many people they have helped that are low income.

Additional information on using classes is included in the following links:

[Mail Merge & Mailing Labels](#)
[Lists of Selected Classes \(Misc. Reports\)](#)

Map Coordinates and MapQuest

Map Coordinates

In matching Volunteers with Receivers, it is obviously helpful to find a Volunteer who lives near the Receiver. The Map Coordinates feature of the database helps you to do this by allowing you to specify their location on a map. Most maps that you can purchase for your service area will contain a grid consisting of vertical columns and horizontal rows. The columns will be identified by letters and the rows by numbers. Thus, if the coordinates for a Receiver are M3 you would look for a Volunteer in M3 or nearby, for example, in the adjacent map area:

L2 M2 N2
L3 M3 N3
L4 M4 N4

On some maps the column/row identifiers might be reversed from the above, namely columns might be identified by numbers and the rows by letters. In this case the target for the Volunteer in the above case would be 3M and the adjacent map area would be:

2L 3L 4L
2M 3M 4M
2N 3N 4N

The database will accommodate either configuration, but you must stick with the same one once you start with it.

If you cannot find a map for your area with coordinates shown, you can make your own by drawing in the columns and rows yourself on whatever map is available.

Use [Finding-A-Volunteer](#) to match Volunteers and Receivers using map coordinates.

MapQuest

Each of the Volunteer, Receiver, Community and Member Congregation forms contains a Get Map button on the General Info tab. If you are connected to the Internet via a Service Provider, clicking this button will connect you to MapQuest from which you can view/print a map for the address shown on the record. For example, clicking Get Map on the record for John Jones will produce driving directions and a map showing the location of John Jones address as it corresponds with his record in CareWorks.

It is suggested that you carefully check the maps provided to be sure they are what you expect. Differences in city names and disagreement between zip codes can produce maps that are not related to the address found in the record.

Priority Records

The **PRIORITY** feature of the database allows you to flag any record in the Volunteer, Receiver, Community, or Member Congregation tables for priority attention by clicking the priority tab and entering a message describing the priority issue.

You will need to decide locally how and for what purpose the Priority feature might be useful.

A good use for Priority is to prevent Receivers from “falling between the cracks” while a suitable Volunteer is being sought. Such an entry might read “Assigned on 02/12/2008 to First United Methodist to find a permanent Volunteer for Visiting and Shopping”.

Priority might also be used where several people work with no overlap staff the office. The next person in could check the computer for Priority messages. These messages could replace the paper notes that might otherwise be used for this purpose, but it would be important for all involved to understand that this is the way such messages were to be handled.

To create a priority message, open the record, click the Edit button, open the Priority tab and type in the text that describes why the record is given priority status. Save the record and exit. Exiting from the priority tab turns the toggle switch ON (red).

When priority messages have been created, you will see a message in red at the top of the global listings: “There are Priority Messages! Select ‘Priority Messages’ from the ‘Type’ list to see those records”. To see a priority message, select it from the list. The record opens directly to the Priority tab. To remove a record from the priority list, remove all text from the Priority box. This changes the toggle switch to OFF and the record is removed from the list.

Priority messages are also flagged with an asterisk in front of their name in the global listings.

Any time you open a priority record, it opens directly to the Priority tab to draw your attention to its priority status.

Finding a Record

This is one of the more complex features of the database. It is based on the Microsoft Access dialog box adapted to CareWorks. Since some users may find that it offers more than they need or are comfortable with, we will try to present it most useable elements and provide examples of how to use them.

But before going into the detail of how Find Record works, recall that the Global Listing on the Main Menu provides a convenient alphabetical list of all individuals/organizations in the system. Many of the reports, for example, the Master Volunteer and Receiver reports, also provide lists that are helpful in locating information about individuals.

Finding a record involves selecting a field that you want to search. **The following fields cannot be searched using Find Record:** the Classification fields, fields in subforms (e.g. donations and assignments), Services Required in the Receiver and Services Offered in the Volunteer forms.

To find a specific value in a field:

- 1) Move the cursor to the field where you want to search. (for example, Last Name)
- 2) Click the **Find Record** button at the bottom of the form. This brings up the Find dialogue box (Replace is not offered as an option so Find and Replace that appears in the background is disabled).
- 3) In the Find What box, type the value you want to find.
- 4) The field (for example, Last Name) you selected should appear in Look In:
- 5) The default entry in the Match box is Whole Field (see below for other options)
- 6) Choose Find Next. The program moves to the record if it exists.
- 7) Choose Find Next again to find the next occurrence of the same value.
- 8) When finished, click the Cancel button or X to close.

To search a field attached to a ComboBox enter the value in Find What, switch to More>> and check Select Fields as Formatted.

With Whole Field entered in the Match field, the program searches whole fields, not the partial contents of fields. If you want to look within each field for certain text, select Any Part of Field. For example you may want to find any field containing a certain word. The program finds each occurrence of the word. See example 5 below.

If you know that the text you are looking for is at the beginning of a field, select Start of Field from the Match box.

Clicking More>> opens up three additional options:

- 1) The program searches text regardless of whether it's uppercase or lowercase. For example, if you specify John, the program also finds john. If you want to find only the exact text you type, select the Match Case option.
- 2) The entry in the Search box determines whether the program moves Up or Down the table in doing the search, or whether it moves through All the records in the table. Normally you will want to search all records, so leave this box set to All.
- 3) You will need to use this to search ComboBox – see above.

You can also use the asterisk * as a wildcard with entries in the Find What box. The * matches any number of characters. It can be used as the first or last character in the entry. Example 5 shows a typical use for this wildcard.

Here are some examples of using Find Record. In all of the examples the form is Receivers and Search set to All.

1) To find all records in the city of Lakewood, move the cursor to City field and click the Find Record button. Enter Lakewood in the Find What box and choose Whole Field in the Match box. Click Find Next to see the first record and repeat to see subsequent records. Click cancel or X to close the dialog box.

2) To find records in Zip 08798, move the cursor to Zip field and click the Find Record button. Enter 08798 in the Find What box and choose Whole Field in the Match box. Click Find Next to see the first record and repeat to see subsequent records. Click cancel or X to close the dialog box.

3) To find all records whose area codes are 609, move the cursor to the Home Phone field and click the Find Record button. Enter (609) including the () in the Find What box and choose Start of Field in the Match box. Click Find Next to see the first record and repeat to see subsequent records. Click cancel or X to close the dialog box.

4) To find the record whose phone is (609)345-1679, move the cursor to the Home Phone field and click the Find Record button. Enter (609)345-1679 (exactly as it would be entered in the field) in the Find What box and choose Start of Field in the Match box. Click Find Next to see the record. Click cancel or X to close the dialog box.

5) As an example of using the * wildcard, let's say you want to find records of those Receivers who have some entry relating to diabetes in the Medical Notes field. These entries might include the single words Diabetic or diabetic, or text such as "This Receiver has late onset diabetes" To find all these records move the cursor to the Medical Notes field and click the Find Record button. Enter dia* in the Find What box and choose Any Part of Field in the Match box. Click Find Next to see the first record and repeat to see subsequent records. Click cancel or X to close the dialog box.

6) To search the Ethnicity field for African American, enter African American in Find What, click More>> and check Select All and Select Fields as Formatted.

Paper Input Forms

CareWorks provides sample paper forms that may be used for taking data that is required by the database. You may also go to www.aboutcareworks.com/Support/FAQs to find downloadable MS Word versions of the forms that you can customize to adapt to your program.

As far as possible, we have tried to include data in the forms for typical program operations. Additional forms or other record keeping systems may be needed to meet local requirements relating, for example, to volunteer references, police record checks, local Service Subcodes etc. In any case, these standard forms should get you off to a good start.

For the most part, the forms have been laid out to be similar to the layout of the forms in the database. The name and telephone number of your organization from [Project Data](#) are included in the heading of each report.

To print the forms, turn your computer on and choose Paper Input Forms from the Main Menu. The forms provided are listed below along with comments on their use.

Volunteer Registration. The form is largely self-explanatory. Data can be entered in the computer either when the Volunteer registers or when the Volunteer completes training. If data are entered before training is completed, choose IN TRAINING for the Status field. When training is completed, change Status to ACTIVE and enter the Date Training Completed. Those fields marked with an asterisk are for the use of office staff only.

Receiver Intake Form. This form can be used to take initial Receiver data, usually over the phone, and then enter it in the Initial Call, General Info and Profile tabs of the Receiver form. It may not be possible to complete the ASSIGNED TO line until after an assessment has been completed, however at least the CONG to whom the Receiver is assigned can be entered. In any case this line is for the first assignment only since assignments will change with time and should be kept up to date in the database using the Monthly Report of Changes in Status (see below)

Receiver Assessment Form. This form will normally be completed following a detailed assessment of the Receiver's needs, usually as part of a Receiver visit. Some of the items on the form, e.g. Name, Address, Phone, repeat information already recorded in the Referral Intake form (above). This ensures that the Receiver is correctly identified and also provides a valuable check that the information obtained over the phone is correct. Again, Services may be adapted to those offered by your specific program. Note that, except for emergency contact, the items recorded under Support System are not transferred to the database, but, if needed, can be recovered from the paper files. As in the Referral Intake form, ASSIGNED TO is an initial one-time entry.

Monthly Volunteer Timesheet. This form is provided for Volunteers to report their services on a monthly basis. It is largely self-explanatory. Subcodes may be added to the Service list as adopted locally. The Miles column is for the use of those programs that track transportation miles. Many groups are finding that email is an efficient way to get Volunteers to report their time which eliminates the need for a Timesheet.

Monthly Congregation Summary. This form summarizes the services of Volunteers by congregation and is normally prepared by the Congregational Coordinators. Data are entered into the computer via [Timesheets-Data Entry](#).

To provide a complete services picture, data must also be summarized in this form for those Volunteers who are members of No or Unknown Congregation or No Congregation.

Since the data are essentially the same, this form could be bypassed and the data entered directly into the computer from the Monthly Volunteer Timesheets. However, using this form keeps the Congregational Coordinator informed, ensures that the data are legible and complete, and makes the tedious job of data entry much more manageable.

Monthly Report of Changes in Status. This form is offered as a way for a Congregational Coordinator to reports changes in status during the month and helps to keep the database up to date. It is used to record changes in Volunteer assignments, as well as changes in the status of Volunteers and Receivers. (for example, those who are placed On Hold or those who are Inactive or No Longer Served.)

Backing Up Your Data

There is nothing more devastating than losing the data that has been so painstakingly entered into your database. It could take you months to re-enter the lost data. There are a variety of causes for such possible data loss. Hard disks are reliable, but will eventually wear out. A badly placed cup of tea can put you out of business. Surges in the electrical system can knock out the hard drive. Not to mention electrical storms, fire, theft, floods etc. etc. The only way to recover from such losses is to follow rigorously a disciplined backup routine.

To back up, choose BackUp from the Main Menu and select the Backup button. Be sure that your floppy drive is inserted into the USB port. This brings up a list of the drives on your computer that accept removable disks. Highlight the correct drive, choose Create Backup and you will get a message "Backup Successful" and you can remove the flash drive. (We strongly urge all CareWorks users to invest in a flash drive to do their daily/weekly/monthly CareWorks backups. The smallest one will hold all of your CareWorks data and you can purchase them at Staples or Office Depot for less than \$20.) It is important to take the flash drive home with you as well for the ultimate in data protection. If your computer still has a floppy disk drive, that will work, but we recommend the flash drive.

Backing up to a Zip Drive/Flash Drive

When backing up to a Zip Drive or Flash Drive, the program assumes there will be enough space on the disk and does not span disks. The program overwrites the CareWorks backup file, but does not erase other files. Although Zip drives are generally reliable, we recommend that you keep a rotating set of two backups just in case.

Whether you use floppies or Zip disks, **we strongly recommend that you take an extra backup off site** at regular intervals to protect against catastrophic loss (fire, flood, vandalism, etc.) of backups at your regular work place.

Maintenance

This section of CareWorks Help deals with adding, editing and changing the content of certain Maintenance tables that are critical to the successful operation of your program. A total of eight tables are involved. They include areas that are specific to your program and which need to be set up locally by you, for example, special Service Subcodes, Referral Source Subcodes, Donation Types, and Classifications.

To protect the integrity of the system, this menu choice is password protected and only those who are thoroughly familiar with the program should enter it. It is recommended that the Director of the program control access to this part of the program.

The password is provided at the time the database is purchased. If it cannot be recalled, it can be obtained by contacting CSIG at 866-274-4462 ext. 100.

You need to be particularly careful when deleting records from Maintenance tables. This subject is covered in a separate topic – Deleting Maintenance Records.

The topics in this section may be accessed directly at the following links:

- 1) [Deleting Maintenance Records - Warning](#)
- 2) Adding, editing, and deleting [Member Congregations](#)
- 3) Adding, editing, and deleting [Service Subcodes](#)
- 4) Adding, editing, and deleting [Referral Subcodes](#)
- 5) Adding, editing, and deleting [Other Tables](#): - Careteams, Classifications, Donation Types, Locations and the City-State-Zip.
- 6) Entering and editing [Program Data](#) (organization name, address, coalition information, etc.) that appear in your Profile Report and on Paper Forms.
- 7) Performing a [Year-End Maintenance](#) that removes old data from your system.
- 8) [Restoring Your Data](#) – Using your backup to restore the data following computer failure or system damage.

Lists of the information in items 2 through 6 above, for example, a list of Member Congregations, Classifications, Service Subcodes etc. are needed for day-to-day operations and access to them is not restricted. These lists may be obtained from: Reports- Misc. from the Main Menu.

Maintenance: Deleting Records – A Warning

When you delete any of the records in the Member Congregations, Service Codes, Referral Codes, Careteams, Classifications, Donation Types, and Locations tables, not only is the record

removed from the table, but it is also removed from all records that are related to these tables. The following are some examples of the involvement of related tables.

Deleting a Member Congregation affects many related records. The congregation is removed from the congregation field of all Volunteers and Receivers who are members of that congregation. The field is left blank. All permanent and one-time assignments assigned to the congregation are removed as well as all donations from the congregation. Suggestions on how to handle the complexity of removing a Member Congregation are detailed in [Maintenance: Member Congregations](#).

Deleting a Service Subcode will remove it from all Volunteer and Receiver records where the subcode has been entered as a service offered or required. All timesheet entries that use the subcode will also be removed from the timesheet table.

Removing a Referral Subcode removes it from the Referral Source field of any Receiver records that refer to it.

When you delete a Careteam, it is removed from all Receiver and Volunteer records that refer to it.

Deleting a Classification removes it from all records that refer to it. For example, if you have established a Trustee classification and delete it, it will be removed from all Volunteer, Receiver, Community and Member Congregation records where it was used.

Deleting a Donation Type removes all donations (Volunteers, Member Congregations, etc.) of that type from the system. If you established a Type for a Bike-a-thon and no longer plan for this event, when you delete the type, all donations to this event will be removed from the system.

Removing a Location from the Location table removes it from the Location field of all Volunteer and Receiver records where it was used.

***Note: The City-State-Zip table is an **unlinked** lookup table and deleting a record from it does not remove the City-State-Zip from the records (Volunteer, Receiver, etc.) that use it. It does, however, remove the record from the lookup table. ***

Maintenance: Member Congregations

Adding and editing Member Congregations are handled in the usual way via the global listing from the Main Menu. To add a Member Congregation, click Member Congregations from the Main Menu then click the Add button. To edit a Member Congregation, open the record from the Main menu list then click the Edit button.

Deleting a Member Congregation, however, has important implications throughout the database. This function is, therefore, protected via the Maintenance Menu. The need to proceed carefully is emphasized by the following message that comes up when you begin deleting a Member Congregation:

“Deleting a Member Congregation affects many associated records including Volunteers, Receivers, donations, etc. Once done, you cannot undo the deletion. It is strongly recommended that you carefully review the Help topic *Maintenance* -

Member Congregations before proceeding with the deletion. You might want to print out this topic from the Help menu to have it available as you proceed."

Deleting a Member Congregation not only removes the congregation record but also has the following effects on other parts of the system:

- 1) The congregation is removed from the congregation field of all Volunteers and Receivers who are members of that congregation. The field is left blank.
- 2) All permanent and one-time assignments assigned to the congregation are removed.
- 3) All donations from the congregation are removed.

First, print the Congregation record from the Global Listing and then prepare the following reports to enable you to monitor the removal process:

- a) The Master Volunteer and Master Receiver reports for the congregation
- b) The report of Inactive Volunteers and Receivers
- c) The List of Donations from the congregation
- d) The Report of Permanent Volunteer Assignments
- e) The Master Schedule Report

When you have deleted the Member Congregation, it will also be removed from the congregation field of the corresponding Volunteer and Receiver records (item 1 above). You will need to decide how to reassign these records. Here are four possibilities:

- 1) The Congregation will continue to exist and the Volunteers and Receivers will still be part of your organization. In this case, change their congregation to Non-Member Congregation and enter the name of the congregation in the Name of Non-Member Congregation field.
- 2) The Congregation will continue to exist but the Volunteers and Receivers will no longer be part of your organization. In this case, print the records of the Volunteers and Receivers involved and delete their records from the system.
- 3) The Congregation will no longer exist, but the Volunteers and Receivers will continue with your organization. In this case, change the congregation field of the Volunteers and Receivers to No or Unknown Congregation.
- 4) The Congregation will no longer exist, and the Volunteers and Receivers will no longer be part of your organization. Same as 2) above.

Use the reports listed above to check that all Volunteer and Receiver records are updated and that any existing assignments or scheduled services are covered.

The above will not cover all circumstances, for example, where some Volunteers stay and others leave. However, the principles set out above should enable you to adjust the contents of the database in a way that will protect the integrity of your data.

Maintenance: Service Subcodes

CareWorks uses 14 primary service categories to identify and record Volunteer services. A numerical code number identifies each service as follows:

- | | | |
|-------------|----------------------|-----------------|
| 10 Visiting | 20 Transportation | 30 Respite Care |
| 40 Shopping | 50 Reassurance Calls | 60 Paperwork |

70 Chores	80 Referrals	90 Hospice
100 Meals	110 Housekeeping	120 Personal Care
130 Administration	140 Other	

In addition, you can add your up to nine subcategories or subcodes under each of these fixed codes. However, such additions complicate record keeping and data entry and should only be added when they bring real value. For example, if one of your funders (for example, the Kidney Foundation) makes a donation based on the amount of transportation you provide taking Receivers to the local Dialysis Center, then the case for establishing a transportation subcode of 21 for "Transport to Dialysis" is clearly justified.

Use of subcodes should be avoided or minimized because they complicate data recording by Volunteers, a process that is frequently already difficult to accomplish completely. And, if you later decide to abandon the subcode, the code itself can be deleted using the Delete Subcode menu choice, but this will also remove all data associated with this code. For more on this see Deleting a Subcode below.

To add, edit or delete a subcode, click the Services tab on the maintenance menu. When adding subcodes, place them logically under the corresponding Primary code. For example, place Medical Transport under 20 Transportation, and Tax Preparation under 60 Paperwork, and Meal Delivery under 10 Meals. If the subcode does not fit logically under one of the designated codes, place it under 140 Other.

Under each Primary code you can add up to 9 subcodes, for example 21 to 29 under Transportation. In order to preserve their universal applicability, you cannot delete or change Primary codes.

To add a subcode, click the Primary category to which you want to add the code, then click **Add Subcode**. This opens a new record at the top of the Services table with the next available subcode and the corresponding Primary Category (Service Description) already filled in. Type in the description of the new Service Subcode and click Save to add the subcode to the table.

Example: To add a new subcode for Transport to Dialysis under Transportation, select 20 Transportation in the table, click Add Subcode. The program adds 21 Transportation to the new record at the top of the table. Type in Transport -Dialysis as the Subcategory (subcode) description, click Save and the new subcode is added to the table.

Changes that you make to entries in the Services table are saved as you make them. When finished, move to another tab or to the Main Menu.

To edit a Subcode select the service, click edit, edit the subcode in the record at the top of the table, then click Save to save it. The changes you make will be reflected throughout the system wherever that subcode is used, for example in the Services lookup table, timesheets, etc.

To delete a subcode, select it, then click delete. You will be asked to confirm deletion of the subcode. **Before deleting a subcode** recall that this operation will not only remove the subcode from the Services table, but will remove it from all records with which the subcode is associated. For example, it will be removed from all Volunteer and Receiver records where the subcode has been entered as a service offered or required. All timesheet entries that use the subcode will also be removed from the timesheet table. The only way to save the timesheet entries, for a subcode 21 would be to go through the timesheet table and manually change all the 21 entries to 20 before deleting the 21 code.

Changes that you make to entries in the Services table are saved as you make them. When finished, move to another tab or to the Main Menu.

Maintenance: Referral Subcodes

CareWorks users 5 Main Referral Sources with numerical codes as follows:

10	10	Social Service Agencies
20	20	Health Organizations
30	30	Self/Family
40	40	Member Congregation
50	50	Other

These referral sources are fixed and cannot be edited or deleted. You can, however, add up to 9 subcodes each under 10 Social Service Agencies and 20 Health Organizations.

When adding subcodes, place them logically under the corresponding Main Codes. For example Office on Aging under 10 and General Hospital under 20.

To add, edit or delete a subcode, click the Referrals tab on the maintenance menu.

To add a subcode, click the Main Referral Source to which you want to add the code, then click **Add Subcode**. This opens a new record at the top of the Referrals table with the next available subcode and the corresponding Main Referral Source already filled in. Type in the description of the new Referral Subcategory (Subcode) and click Save to add the subcode to the table.

Example: To add a new subcode for Office on Aging under 10 Social Service Agencies, select 10 Social Service Agencies in the table, click Add Subcode. The program adds 11 Social Service Agencies to the new record at the top of the table. Type in Office on Aging as the Subcategory (subcode) description, click Save and the new subcode is added to the table.

To edit a Subcode select the service, click edit, edit the subcode in the record at the top of the table, then click Save to save it. The changes you make will be reflected in the Referral Source field of the Receiver form.

Before **deleting a subcode**, recall that this operation will not only remove the subcode from the Referrals table, but will remove it from all records with which the subcode is associated. It will be removed from all Receiver records where the subcode has been entered in the Referral Source field.

Changes that you make to entries in the Referrals table are saved as you make them. When finished, move to another tab or to the Main Menu.

Maintenance: Other Tables

The **Careteam, Classification, Donation Type, Location and City-State-Zip tables** are included under this one heading because editing, adding and deleting records from these tables are generally handled the same way.

Proceed carefully when you open these tables in order to avoid the possibility of accidental changes to the records. Any changes you make are automatically saved whenever you switch to another maintenance page or return to the Main Menu.

To edit a record, click the field you want to change and enter the change from the keyboard.

To add a record, click the empty record at the bottom of the table and enter data for the new fields.

To delete a record, select it by clicking the record selector (the square in the left hand column) and press the delete key on the keyboard. You will be asked to confirm that you want to delete the record.

There are a few items that pertain to specific tables as follows:

For the **Careteam** table, select the Team Leader from the dropdown list of Volunteers. Choose a code of up to three letters, preferably that relate to the team name. For similarity of presentation, the program automatically enters the code in capitals.

For Code in the **Classification** table, add a letter or numeral 1 to 9. You can have up to 35 classifications – the 26 letters of the alphabet plus numbers 1 to 9. The program automatically enters the code letters in capitals.

For **Locations**, choose a code of up to three letters, preferably that relate to the location name. The program automatically enters the code in capitals.

Although you can add new records via the **City-State-Zip** table, they will normally be added to the table when you add a new zip code in a record ([Auto Zip](#)). You can edit existing records e.g. to correct a misspelled City, or delete records to clean up the list if you find it has become too long e.g. by the addition of numerous Zip + 4 codes.

Maintenance: Program Data

Program Data is a form used to enter fixed data that are included in the Profile Report and Paper Input Forms; - data such as the name and address of the FIA program as well as staffing and financial information. **You should complete as much of this form as possible when you receive the database and add to/review the data periodically to ensure they are up to date.**

The following describes the data needed to complete the form where they are not obvious:

Program ID: This field is provided in the expectation that eventually Profile Reports will be consolidated at the state and national level. At that time the ID number will form the basis for uniquely identifying your organization. Leave this field blank for now.

Community Partners: List the organizations in your community whom you consider to be your main partners in helping you accomplish the mission of your program, for example: the local Area Agency on Aging, Hospital, United Way, etc. Do not include Member Congregations. These are reported separately in the report as Number of Participating Congregations.

Services Provided: List here the services you offer to provide to the community you serve. The list will normally include some of the services that appear in the standard Services List of the database, but may reflect subcodes of these services as well as detailing those services covered by "other" in the Services list. Note that actual services provided are extracted from the database and reported under Service Distribution in the Profile Report.

Expenses: Show only the two categories - Payroll (salaries, social security, fringe benefits) and Non Payroll (all other expenses). Report these on a total annual basis for the calendar or fiscal year to which the report applies even though the reporting period may be for a partial year. For example, when the report is for the period January through June 2008, report expenses on a full year 2008 basis.

Income: Report income on a full annual basis according to the categories indicated. Under OTHER include all other sources of income so that the total is the total income for the year from all sources.

Paid Staff: Report the total number of paid staff that corresponds to the payroll figure included above. Report staff on a full-time equivalent basis, for example a full-time Director, half-time Volunteer Coordinator, and a half-time Secretary equals 2.0 Paid Staff. Full-time is defined as 40 hours per week.

Year-End Maintenance

As explained in the topic on [Deleting Versus Changing Status](#) changing the Status of a Volunteer to Inactive or a Receiver to No Longer Served leaves them in the system so that, in time related reports such as the Profile Report, they are included in the numbers and services provided for the period when they were active or served. For example, a Volunteer who became Inactive on 3/1/2008 will be included in a Profile Report for 1/1/2008 to 6/30/2008, but not for the period 7/1/2008 to 12/31/2008. However, at some point in time, it will be necessary to clear or purge the system of old records. This is the function of the Year-End-Maintenance menu option. How long you keep records depends on the needs of your particular program. For example, what do funding agencies require, and what is the size of your computer. We suggest you keep records for at least three years and establish the practice of purging the system each year at the beginning of the year.

Since you will not need to purge your system until you have been using the database for at least 3-4 years, we have, in the interest of moving the database to market quickly, decided not to include purge functionality now, but will include it in the next update.

Maintenance: Restore Your Data

When you install CareWorks the application creates a CareWorks directory and installs the database application in it. You access the application via Start-Programs-CareWorks or the desktop icon. As part of the installation process, a separate application is created for the restore function which you can use to restore your data should the need arise. The restore application is called CareWorksRestore and resides in its own directory CareWorksRestore. You access CareWorksRestore via Start-Programs-CareWorksRestore.

CareWorksRestore is installed separately from CareWorks using the Wise Installation Wizard. When asked, accept the default destination for Restore namely C:\Program Files\CareWorksRestore.

The next screen asks where to put the CareWorksRestore icon. Accept the default location, i.e. CareWorks Restore. Then finish the installation.

The purpose of the Restore function is to permit you to bring into the application the data from your most recent Backup in the event that you experience problems of table corruption, hard disk failure or other problems that require you to replace the data in your application. You can also use it, together with your original application disk, to move the system to a new computer.

To use Restore, click Start-Programs-CareWorks-CareWorks Restore from the desktop. Place your flash drive in the corresponding USB port. Click the **Locate Backup File**. Go to the location of your flash drive and look for BakCareWorks_be.zip. Highlight it and click Open.

Click **Locate File to Replace**. **The file to replace is CareWorks_be.mdb** located in the CareWorks directory. Either C:/ProgramFiles/CareWorks OR C:/ProgramFiles/CSIG/CareWorks. Select the file, click Open, and then click Restore. A message should come up confirming successful restore.

Technical Support

For technical support CSIG offers two options:

a) An annual subscription at a cost of \$100 per year that entitles you to unlimited technical support for one year as well as free updates to the software. We belong to an online support program so that we can, with your permission, remotely access your computer and diagnose problems. Many users find this to be very helpful. So that we can get you up and running quickly and smoothly, we require that you pay for CareWorks annual support for the first year after you purchase the database. After the first year, participation in CareWorks annual support is optional, but most groups find it invaluable.

b) After the first year, support for a single incident can be purchased for \$25 per incident payable upon receipt of invoice.

In any case, if we are unable to get you up and running within a reasonable time after purchase of the database, we will refund the purchase price and first year support fee.

Before calling for technical support, we suggest you refer first to this help program.

You can also visit our website: www.aboutcareworks.com and check out the common support questions in the FAQ section.

Our toll free support phone number is 866-274-4462 ext. 100

Networking

CareWorks is designed to operate as a standalone or network (either peer to peer or client server) application. There are currently many groups using CareWorks networked successfully and Technical Support can provide instructions if you would like to network your program. We caution networked users about having two or more people making changes to the same tables at the same time. For example, if two people are entering new Volunteers at the same time, there is a possibility of some data being lost.

We strongly recommend that you have someone who can act as a network administrator to take care of the hardware connections. We will be available to answer questions or do work at our normal billable rate.

Exiting the Program

To exit the program entirely, the user should click the "EXIT" button on the Main Menu. Microsoft automatically does a detect and repair operation upon exiting, so it is important to exit properly.