

Recording Assistance Periodically in CharityTracker

Time Volunteered, Mileage, Visit Types, Dollar Values,
People Helped, In-Kind Goods and Services

Finding your Conference for Entering Assistance

1. Click on “Search” in CharityTracker.
2. In the “First name” field enter “SVdP” and click “Search.”
3. Click on the case record that appears with your conference’s name (e.g., SVdP Holy Redeemer, SVdP St. Clement, etc.).

Adding Assistance

4. Click on the Assistance tab.
5. Click “Add Assistance.”

Recording Visit Information

6. For recording **VISITS**, choose the appropriate category (see page 2). Enter the *number* for the month and choose the *unit* “Visits.” In the *Description* box, add the number of people “assisted” during those visits. For example, if you make four home visits and two of those visits had two residents and the other two visits had one resident each, you’ll enter “4” in the “Amount” field and select “Visits” from the Units field. Record “6” in the Description box. When the monthly/yearly report is run, it appears as an Excel spreadsheet. If all we put in the *Description* box is a number, we can summarize a numerical total from that column on the spreadsheet to get the information needed for the annual report. After each Visit subcategory, click “*Save and Add Another*” at the bottom of the “*Add Assistance*” page. After your last category, click “*Add*.”

- a. Home Visits: You met in their place of residence and were able to assess their needs visually.
- b. Other In-Person Visits: Phone calls, Zoom calls, or you met at a location other than their home.
- c. Eldercare Visits: You visited the home, nursing home, or assisted living residence of a shut-in who did not make a financial request.
- d. Hospital Visits: You visited someone in the hospital or rehabilitation center.
- e. Prison Visits: You made a visit to someone who is incarcerated.

Recording Mileage

7. For recording miles, choose SVdP: Miles from the category dropdown list. This is any amount of mileage driven for any St. Vincent de Paul related purpose. Remember to also select “Miles” for the Unit from the dropdown list. Round off miles (i.e., 8, not 7.8 or 5, not 5.1).

Recording Time

8. The annual report also asks for the amount of time volunteered for your conference’s activities by Vincentians and by non-Vincentians.

9. Add up the number of hours volunteered for the month by Vincentians. Enter the number with the unit “Hours.” Record time in quarter hours (15 minutes = .25 hours, 30 minutes = .50 hours, etc.). Select the category “SVDP: Time Volunteered: Vincentians.”

10. Do the same with hours volunteered for the month by non-Vincentians for conference activities. Enter the number of hours and select the category “SVDP: Time Volunteered: Non-Vincentians.”

Recording in-Kind Donations

11. Categories have been created for In-Kind Goods and Services to match all of the same categories in the annual report. With beds, clothing and furniture, referrals should come to you with the category “SVdP:Thrift Store Voucher:Furniture”, for example. To record these, change the category to the associated “in-kind” good or service and enter the estimated dollar value. In the Description box, type the number of times (during your recording period) an In-Kind donation was made in that category.

Examples

Sleep in Heavenly Peace Beds

There is no monetary outlay by St. Vincent de Paul, so there will not be any dollar amount recorded by us for the bed. Instead, record the following when sending a SHP referral:

- a. *Time Volunteered: Vincentian* the time you spend assisting the neighbor. Time is tracked in hours, not minutes.
- b. *Time Volunteered: Non-Vincentian* (if applicable – time for one who is not a member of SVdP who accompanies on the visit)
- c. *Mileage*: distance driven by Vincentian for visit
- d. *Visit*: Enter the number of times during your reporting period that you visited neighbors in need of bed referrals. Enter that number into “Amount.” Select “Visits” from the “Units” dropdown list. Select the category “SVdP: Home Visit.” In the Description box enter the number of people impacted in those households.

In-Kind Donation: Furniture

A fellow parishioner donates furniture to the conference to give away to someone in need. Record the following:

- a. *In-kind Donation: Furniture*: In the “Amount” and “Units” lists, enter the estimated value of the furniture given away.
- b. *Time Volunteered: Vincentian* the time you spend assisting the neighbor. Time is tracked in hours, not minutes.
- c. *Time Volunteered: Non-Vincentian* (if applicable – time for one who is not a member of SVdP who accompanies on the visit).
- d. *Mileage*: distance driven by Vincentian for visit.
- e. *Visit*: Taking furniture to someone’s home would be recorded as a home visit. Enter the number of times during your reporting period that you took furniture to neighbors in need. Enter that number in “Amount.” Enter “Visit” in the Units dropdown list. Select the category “SVdP: Home Visit.” In the Description box enter the number of people impacted in those households.
- f. Follow the same procedure to record In-Kind Donations for Clothing, Food, and Other and for In-Kind Donations of Services (Medical, Dental, Legal, Other - if applicable).

Recording Vouchers to Individual Case Records in CharityTracker

Thrift Store Vouchers, Appliance Vouchers, Multiple Categories in one request

SVdP: Thrift Store Voucher: Furniture

A neighbor requests furniture and/or household items. Your conference submits an online voucher. Record the following in CharityTracker:

- a. Time volunteered by Vincentians, Non-Vincentians, Mileage and Visit Types are recorded *the same as you would with in-Kind Donations of Goods*.
- b. On the individual's case record, **do not** change the *Amount* and *Unit* that was requested. This is typically entered as "1 Item."
- c. **Do** update the status from "Pending" to "Pending Payment/Approval." **Do not** change the status to "Approved."
- d. In the Description Box, enter the dollar amount you listed on the voucher.
- e. That's it. If the voucher is redeemed, our accountant will update the dollar amount to match the invoice and will update the status from "Pending Payment/Approval" to "Approved."

SVdP: Thrift Store Voucher: Clothing

- a. Record the same as you would Furniture Vouchers, including the Status Update. The only difference is with letter "d."
- b. In the Description Box (letter "d" above), enter the number of Adults and the number of Children you wrote the Voucher for.

SVdP: Thrift Store Voucher: Bed

- a. Record the same as you would Furniture Vouchers, including Status Update. The only difference is with the letter "d."

- b. In the Description box, letter “d” from Furniture vouchers, enter details about the number of beds, size of beds, and bed parts (full set, frame only, mattress only) that you wrote the voucher for.

SVdP: Appliances

A neighbor requests help obtaining some appliance. Record the following in CharityTracker:

- a. Time volunteered by Vincentians, Non-Vincentians, Mileage and Visit Types are recorded *the same as you would with in-Kind Donations of Goods*.
- b. On the individual’s case record, **do not** change the *Amount* and *Unit* that was requested. This is typically entered as “1 Item”.
- c. **Do** update the status from “Pending” to “Pending Payment/Approval.” **Do not** change the status to “Approved.”
- d. In the Description box, enter the dollar amount you listed on the voucher.
- e. That’s it. If the voucher is redeemed, the accountant/bookkeeper will update the dollar amount on the request to match the invoice and will update the status from “Pending Payment/Approval” to “Approved.”

Multiple Categories Requested

Example: you provide vouchers for furniture and clothing.

- a. Record one or the other following the directions for that category.
- b. In the Description Box note that you also wrote a voucher for an additional category.
- c. That’s it. Our Accountant will make a separate entry in CharityTracker recording your assistance when the vouchers are redeemed.