

SVdP National Conference Activity Report Guidelines

ServWare provides the ability to generate a Conference report representing the National Society of St. Vincent de Paul report requirements for conferences. This report is based on the Consolidated Report of the Conferences section of the Archdiocesan Council Annual Report form.

This document describes the sections of the report along with the ServWare configuration and data entry requirements to accurately generate the data.

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Archdiocesan Council Annual Report Requirements for Conferences

The SVdP Archdiocesan Council Annual Report includes a specific section for Conferences that includes sub-sections for the following information:

- Conference Membership
- Account Balance
- Receipts
- Expenses
- Person-to-Person Visits
- In-Kind Goods and Services
- Hours and Mileage In-Service

Conferences are required to periodically report this information to their respective Districts/Councils which in turn aggregate the data to provide to National.

Each of the Conference report sections can be populated from data entered into ServWare. Some data can be entered as part of standard ServWare features that are available to all conferences (i.e. Conference Membership, Visits, In-Kind) but other sections require that specific Conference configuration options are enabled to allow data to be entered for those categories (i.e. Account Balance, Receipts, Expenses, Hours and Mileage In-Service).

This document will describe each section of the report and how information can be entered into ServWare to accurately create the report.

National Report Categories in ServWare

ServWare has defined National Report Categories that correspond to the Conference sections of the Annual Report of the Archdiocesan Council. Conference administrators must assign these categories to specific Conference configuration options such as Assistance Types, Receipt Types, and Expenditure Types in order for the report to be generated accurately.

This document describes how report sections are related to the National Report Categories defined in ServWare and how they should be associated through conference configuration in order to generate the respective report section.

Conference Membership Section

The Conference Membership section of the Archdiocesan Council Annual Report includes the following information:

- Member status totals (i.e. Active/Associate)
- Members ethnicity totals
- Members age range totals

This information is available to be entered for each Conference member created in ServWare. The information can be entered by a Conference administrator by editing a Conference member record on the Admin->Conference Members page or Conference members themselves can enter the information by clicking on the Edit Profile menu option under their username when logged in.

Note: ServWare National Report Categories are not associated with this section of the report and therefore do not have to be assigned.

Conference Member - Amy Abbot

[Members List](#)

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General
Membership

Primary Role

Secondary Role

Other Role

Initial Member Dt

Member Type

Ethnicity

Age Range

Treasurer's Report - Account Balance Section

The Account Balance section of the Archdiocesan Council Annual Report provides beginning and ending account balances for the Conference. This information is populated in the report from the Finance->Accounts information.

When an account is added or edited from the Finance->Accounts page there is a National Report Account checkbox that must be checked in order for the account's information to be used for the report. If multiple accounts are entered with the National Report Account checkbox checked then the beginning and ending balances from each account will be added together for the report values.

Note: In order to populate the Account Balance section of the Conference Activity Report correctly the Financial functions configuration options must be enabled for the Conference.

Edit Account

***Account Name**

Account Type

Notes

Beginning Balance

Ending Balance

National Report Account?

Active?

Treasurer's Report - Receipts Section

The Receipts section of the Archdiocesan Council Annual Report provides conference receipt totals for various categories such as Donations from Members, Church/Poor Box Collection, Fund Raising, etc. This information is pulled from the Finance->Conference Receipt entries.

Receipt Type Association to National Report Category

In order to correctly populate a receipt category on the annual report the Conference Receipt Types must be added and associated with a National Report Category. A receipt type may only have one National Report Category associated.

For example, a Conference might create a receipt type named Parish Donations which would be associated with the Church/Poor Box Collections National Report Category.

Note: In order to populate the Receipts section of the Conference Activity Report correctly the Financial functions configuration options must be enabled for the Conference.

Edit Receipt Type

***Name**

National Rpt Catg

Description

Allow Donor Assignment?

Active?

Treasurer's Report - Expenses Section

The Expenses section of the Archdiocesan Council Annual Report provides conference expense totals for various categories such as Those We Serve, Domestic Twinning, Operating Expenses, etc. This information is pulled from the Finance->Conference Expenditure entries.

Expenditure Type Association to National Report Category

In order to correctly populate an expense category on the annual report the Conference Expenditure Types must be added and associated with a National Report Category. An expenditure type may only have one National Report Category associated.

For example, a Conference might create an expenditure type named Twinning to Other Councils which would be associated with the Domestic Twinning National Report Category.

Note: In order to populate the Expenses section of the Conference Activity Report correctly the Financial functions configuration options must be enabled for the Conference.

Edit Expenditure Type

***Name**

National Rpt Catg

Description

Active?

Person-to-Person Visits Section

The Person-to-Person Visits section of the Archdiocesan Council Annual Report provides visit totals and the associated number of people helped for each respective visit type.

Visit types are specified on assistance requests in ServWare.

SVdP nationally recognized visit types

The following visit types are recognized by SVdP National and can be specified on an assistance request in ServWare.

- Home Visits
- Prison Visits
- Hospital Visits
- Eldercare Visits
- Other In-Person Visits

Conditions for counting a visit

When editing an assistance request in ServWare the associated visit type can be specified by checking the appropriate checkbox on the General tab when editing the request. The conditions below must be met in order for a visit to be counted on the report.

- A specific visit type must be checked
 - Note: Multiple visit types can be checked on a request and counted
- The Visit Complete checkbox must be checked
- Visit scheduled date must fall within the report date range OR if no scheduled date is entered then the request date must fall within the report date range.

Visit Details	<input checked="" type="checkbox"/> Home	<input type="checkbox"/> Other	<input type="checkbox"/> Prison	<input type="checkbox"/> Hospital	<input type="checkbox"/> Eldercare
<input checked="" type="checkbox"/> Visit Complete?	Assigned To (1) -- Select --	Assigned To (2) -- Select --	Mileage <input type="text"/>	Hours <input type="text"/>	Helped ⓘ <input type="text"/>
Scheduled Date 06/26/2019	Time hh:mm AM/PM 10:30 AM	Duration (Minutes) <input type="text"/>	Visit Notes 🔗 <input type="text"/>		

Calculating the number of people helped on a visit

The number of people helped on a visit can be calculated in the following ways:

1. Family Members Tab
 - a. Number of Adults and Children
 - i. If the number of adults and children are entered on the Family Members tab of the request then the total of those values will be used as the number of people helped.
 - b. If individual family members have been entered on the neighbor record and are displayed on the Family Members tab of the assistance request then the number of people helped for the visit will count those individuals PLUS the neighbor themselves.
2. No Family Members
 - a. If no family members have been entered on the neighbor record and there are none displayed on the Family Members tab of the assistance request then the number of people helped will be 1, which represents the neighbor themselves.
3. Helped Field on Assistance Request General Tab
 - a. The Helped field in the Visit Details area of the General tab of the assistance request represents the total number of people helped for visit.
 - b. This field should only be used for visit types that involve more than one family/household such as a prison or eldercare visit. For these types of visits, you would not have individual family members listed as this would not make sense.
 - c. If a number is entered into the Helped field in the Visit Details area of the assistance request then that value will be used to determine the number of people helped.

In Kind Services and Goods Section

The Archdiocesan Council Annual Report includes a section for “In-Kind Services” and “In-Kind Goods” to include the number of times an In-Kind Goods or Service category was provided to those in need and also the associated total dollar value for the category.

SVdP nationally recognized In-Kind Services and Goods Categories

The In-Kind Services and Goods categories listed below are recognized by SVdP National and can be added as assistance on a request in ServWare. In-Kind categories can be updated from the Admin->In-Kind Categories page in ServWare by a conference administrator.

In-Kind Services

- Legal
- Medical

- Dental
- Other

In-Kind Goods

- Food
- Furniture
- Clothing
- Other

Assigning In-Kind on an assistance request

In-Kind Goods and Service Categories are assigned as assistance on an assistance request. When adding assistance on a request, the In-Kind assistance type can be selected which then allows an In-Kind category to also be selected. The estimated value of the In-Kind assistance should also be entered.

If the date provided for the In-Kind assistance entry falls within the report date range then the respective In-Kind category totals will be updated on the report.

Assistance for Ned Acorn

***Assistance Type** ▼

In-Kind Category ▼

***Value**

Date Provided

Hours of Service and Mileage Information

The Hours of Service and Mileage section of the Archdiocesan Council Annual Report provides the hours of service and estimated miles associated with conference activities for the specified time period associated with the report.

This information is calculated based on the entries in the Mi/Hrs area of ServWare.

Note: In order to populate the Hours of Service and Mileage section of the Conference Activity Report correctly the Mileage/Hours In-Service Tracking option must be enabled for a conference from the Admin->Conference Detail page on the Configuration Options tab.

Entering Service Hours and Mileage

Service hours and mileage can be entered into ServWare in the following manner:

- Mi/Hrs page
 - From the Mi/Hrs menu option a service/mileage entry can be added, edited or deleted.
 - The associated date of the entry will be used to determine if it should be included in the report calculations.
- Assistance Request Visit Details
 - The Visit details area of a request includes fields to enter total mileage and hours associated with a visit for the request. If these fields are populated and the request is saved then an associated mileage/service hours entry is made which can be viewed/edited on the Mi/Hrs page.