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

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

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Search/Enter a Family

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

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

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

Post Needs, Record Visits, Schedule Future Visits

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

See Visits at Other Organizations

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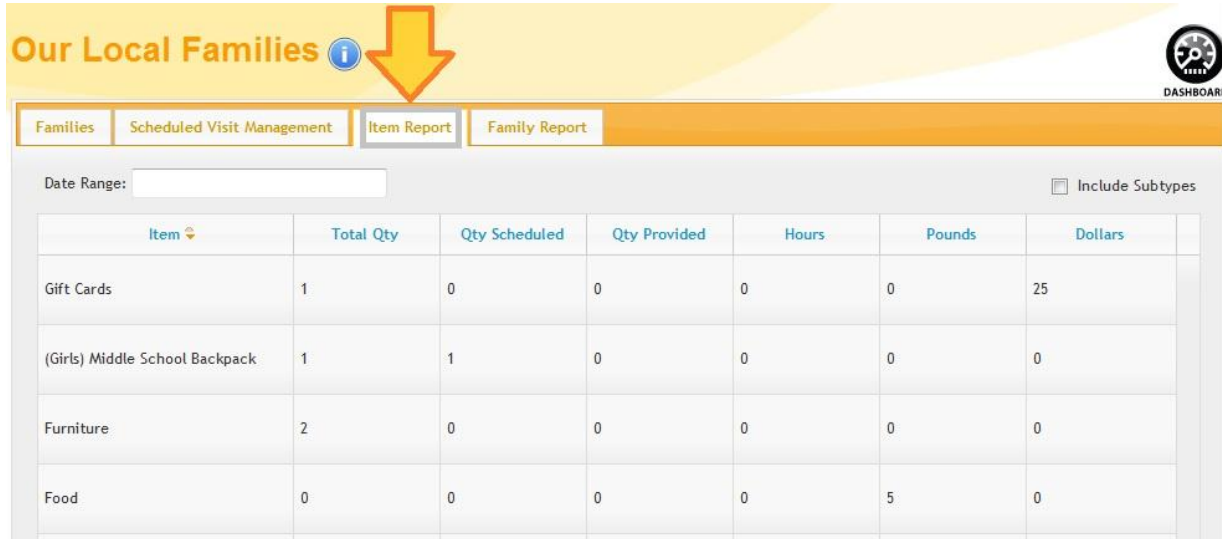

Record a Visit and Items/Services Given

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

Run Items and Family Reports

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

Schedule Future Visits

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

Click the "Scheduled Visit Management" tab. Select the date or click "Add Shift" to add the day and time of a different future visit.
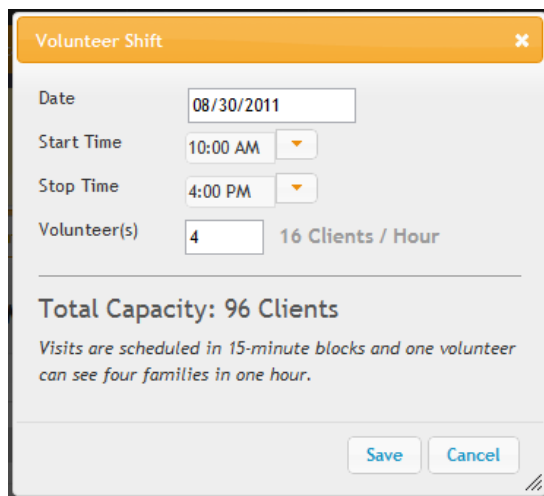
When you click "Add Shift" you will select a day and time frame and the number of volunteers/clients you want to schedule on that day. Click "Save".
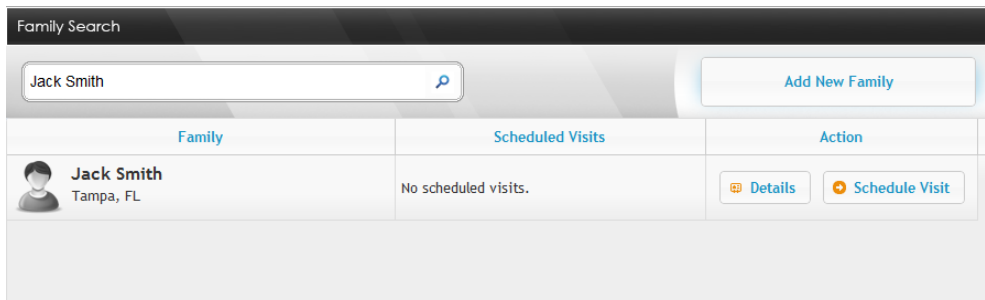
You will then need to click on the "Open Scheduler" button:
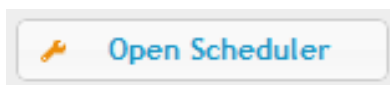
In the search box, you can type a name, number, social etc. to search for a family. If you find the family whose information you are entering or who you are meeting with, you can click on "Details" for more information or "Schedule Visit".

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

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

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

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

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

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

On the date the family returns for their appointment, go to www.meettheneed.org/scheduler, log-in, and scan the bar coded sheet (If using bar codes), which will automatically pull up the family's information and their scheduled visit(s). If the family forgot to bring or lost the bar coded sheet, search for them by name, SSN#, etc. using the Family Search box shown above. Then click "Check In" next to appropriate appointment

and confirm the items they are receiving that day. If the family came at a different day or time, then you should also edit the date and time at the top of that Check In page: