CERVIS Tips for Community Sponsor Group Members

This step-by-step tutorial will walk you through logging into your CERVIS account to register for clients' scheduled needs, signing in for your scheduled needs shift, and/or logging group service project activity.

20 Steps View on Tango

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STEP 1

Go to Catholic Charities of Central & Northern Missouri – Volunteer Console

CERVIS can be accessed directly at https://cccnmo.cervistech.com/acts/console.php?console_id=0268&console_type=event&ht=1 or by following the links embedded on the volunteer page of the CCCNMO website. Enter password and submit CERVIS sign-in.

STEP 2

Register for an Upcoming Scheduled Need

To register for upcoming scheduled needs associated with a specific refugee case, visit the Volunteer Portal Home and select Register for an Upcoming Event.

Scheduled needs are arranged in advance through CCCNMO or the sponsor group leader, and the service hours apply to one case only. Scheduled needs could include, but are not limited to medical appointments (primary care, specialist, follow-up, dental, immunization, counseling, etc.), basic needs (shopping assistance, transportation, etc.), benefits assistance (WIC appointments, assistance with benefit applications or medical claims, etc.), education assistance (ELL instruction or tutoring, assistance with school enrollment, paperwork, homework, conferences, etc.), community integration (visits to the library, parks, rec centers, or other locations in the community that help the family become acquainted with their new home).
STEP 3

Select Volunteer

Choose the name of the volunteer you wish to register.
Select Opportunity

Select the case-specific opportunity. There will be a separate opportunity for each case the sponsor group is matched with. Each opportunity will begin with the sponsor group’s CERVIS tag (a variation of the sponsor group’s name), followed by the refugee primary applicant’s first initial, last name, and case number. The opportunity description will contain important case information. It is critical that sponsor groups work with Catholic Charities staff to safeguard client information. PII and case details will only be shared with on boarded members of the community sponsor group.

Additional opportunities for the agency will also be listed. Community sponsor volunteers are welcome to register for additional opportunities outside of their sponsor group role.
STEP 5

**Proceed to Time Slot Selection**

Select "Click here to choose time slot(s) and register for event" to view available time slots for the selected opportunity.

![Select Available Opportunity](image1.png)

STEP 6

**Select Time Slot**

Select desired time slot(s). The note below the date and time will vary and includes information such as brief description of the activity and client involved, location, and grant details (grant details are only necessary for CCCNMO staff records).

![Select Available Slot](image2.png)
STEP 7

Submit Registration

After selecting desired time slot(s), select "Register" at the bottom of the page. A note will appear on the page indicating that registration was successful.
STEP 8

Registration Confirmation and Reminder Emails

After successfully registering for a desired time slot(s), you will receive an email confirmation with opportunity details. You will also receive an email reminder 2 days prior to the service opportunity (NOTE - if the registration is made within 2 days of the time slot, a reminder email will not be sent).

Emails are generated through CERVIS and will appear in your inbox from Catholic Charities of Central & Northern Missouri <app_email@cervistech.com>. If you do not receive a confirmation/reminder email in your inbox, check your junk or spam folder.

In addition to necessary details (including clients name(s), address, and contact information) both emails will contain a cancellation link and a mobile sign-in link.
Signing In for a Scheduled Needs Shift

On the day of the scheduled needs shift you are registered for, select "Mobile Sign-In" from the confirmation/reminder email. This link will open a new window titled CERVIS Mobile Sign-In. Click "Sign-In" to begin recording service hours for your scheduled needs shift.
STEP 10

Signing Out of a Scheduled Needs Shift

After you have completed your scheduled needs shift, access the previously opened browser window titled CERVIS Mobile Sign-In (this can be done by pulling up the open browser window or by selecting "Mobile Sign-In" from the confirmation/reminder email). Enter impacts associated with the scheduled need, such as mileage or contributions. Use the designated fields to enter the value (number) and description of the impacts. If no mileage or contributions are associated with the scheduled need, enter 0 in both value fields. Click "Sign-Out" to stop recording service hours for your scheduled needs shift.

STEP 11

FAQ – I Forgot to Sign-In for the Scheduled Needs Shift

Each scheduled need has a programmed start and end time, as well as an estimate of the total number of hours served. The programmed start time accounts for arrival at the home and transportation to the service activity (if applicable). The programmed end time accounts for the entire duration of the service activity and return transportation from the service activity (if applicable). The estimate of total hours served reflects the total anticipated time to complete the scheduled need.

If you have registered for a scheduled needs shift, but do not sign-in, CERVIS will record the programmed estimate of total hours. If your total time served falls within 15 min. of the estimate, no action is needed. If your total time served exceeds 15 min. of the estimate, contact CCCNMO or sponsor group leaders to adjust the hours.
STEP 12

FAQ – I Forgot to Sign-Out of the Scheduled Needs Shift

If you signed-in to a scheduled needs shift, but do not sign-out, CERVIS will record the total hours from sign-in through the programmed end time of the shift. If your total time served falls within 15 min. of the programmed end time, no action is needed. If your total time served exceeds 15 min. of the programmed end time, contact CCCNMO or sponsor group leaders to adjust the hours.

Impacts associated with the scheduled need, such as mileage or contributions, can be recorded in CERVIS on another screen (see instructions to Record or Update Volunteer Impacts).

STEP 13

FAQ – I Need to Cancel Registration for a Scheduled Needs Shift

Option 1: Select "Cancel Registration" from the confirmation/reminder email. This link will open a new window titled Cancel Event Registration. Select "Click here to cancel registration" to cancel your scheduled needs shift.

Option 2: Visit the Volunteer Portal Home and select View or Cancel Registration for an Upcoming Event. Check the box(es) next to the scheduled need and then click "Cancel selected registrations" to cancel a scheduled needs shift.

NOTE - If you cancel registration within 2 days of the time slot, notify CCCNMO and sponsor group leader so that alternate arrangements can be made.
**Service Project Activity**

To record service hours associated with assigned refugee case(s), visit the Volunteer Portal Home and select Record or Update Service Project Activity.

Service project hours are recorded retrospectively (following discussion/approval by CCCNMO or the sponsor group leader), and are often used to record service hours that apply to multiple cases. Service project hours could include, but are not limited to fulfilling onboarding requirements, training, administrative duties (correspondence, scheduling, etc.), group meetings, etc.
STEP 15

**Entering Service Project Activity**

In addition to separate case-specific opportunities for each case the sponsor group is matched with, sponsor groups also have a service project. The service project will begin with the sponsor group's CERVIS tag (a variation of the sponsor group's name), followed by Service Project. The service project description will contain important information for all cases the group is matched with. It is critical that sponsor groups work with Catholic Charities staff to safeguard client information. PII and case details will only be shared with onboarded members of the community sponsor group.

Additional service projects the volunteer is enrolled in will also be listed. Community sponsor volunteers are welcome to register for additional service project hours outside of their sponsor group role.
STEP 16

Completing a Service Project Activity Entry

Select the name of the volunteer and service project, followed by the date the service was provided and the total number of hours served. In the Notes field, provide a brief description of the service provided, names of the clients involved (if applicable), location, and outcome (if applicable). This information will be reviewed and used by CCCNMO staff. Click "Record Service Project Activity" when finished.
STEP 17

Review or Update Service Project Activity

Entries will appear under the heading Current Profile Service Project Activity. To edit notes, select the notes icon, enter revisions, and select save changes.

STEP 18

Record or Update Volunteer Impact

To view, record, or update impacts associated with scheduled needs shift or service project entry, visit the Volunteer Portal Home and select Record or Update Volunteer Impact.
Log or Update Impact

Click on Log Impact or Update Impact
STEP 20

**Enter Volunteer Impacts**

Enter impacts associated with the scheduled need, such as mileage or contributions. Use the designated fields to enter the value (number) and description of the impacts. If no mileage or contributions are associated with the scheduled need, enter 0 in both value fields. Click Log Impact to complete the entry.