



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](#)

Created by

Chelle Smith-Vandergriff

Creation Date

June 14, 2022

Last Updated

August 15, 2022

STEP 1

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

CERVIS can be accessed directly at https://ccnmo.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).

The screenshot displays the Volunteer Portal Home interface. At the top, there are three filter buttons: '4 Hours', '1 Activities', and '5 Months'. Below these is a dark navigation bar with a home icon, the text 'Volunteer Portal Menu', and a user profile picture. The main content area is titled 'Volunteer Portal Home' and features a section for 'Event Registration Management (one-time or short-term opportunities)'. Within this section, the link 'Register for an Upcoming Event' is highlighted with a red rectangular box. Below it, a partially visible link 'View or Cancel Registration for an Upcoming Event' is shown. A 'Made with Tango.us' watermark is present in the bottom right corner of the screenshot.

STEP 3

Select Volunteer

Choose the name of the volunteer you wish to register.

If you would like to view the opportunities you are CURRENTLY registered for, or CANCEL your registration for an upcoming opportunity, please [CLICK HERE](#).

If you would like to view your PAST registration activity, please [CLICK HERE](#).

If you would like to log impact for an activity you have participated in, please [CLICK HERE](#).

Step 1: Select a Volunteer Below

Test T.

- Show Opportunity Calendar
- Use Private Registration Code
- Search Opportunities by Interest, Location, Date or Keyword

Step 2: Select an Available Opportunity Below

Highlighted Opportunities

GROUPS
--------	-----	-----	-----

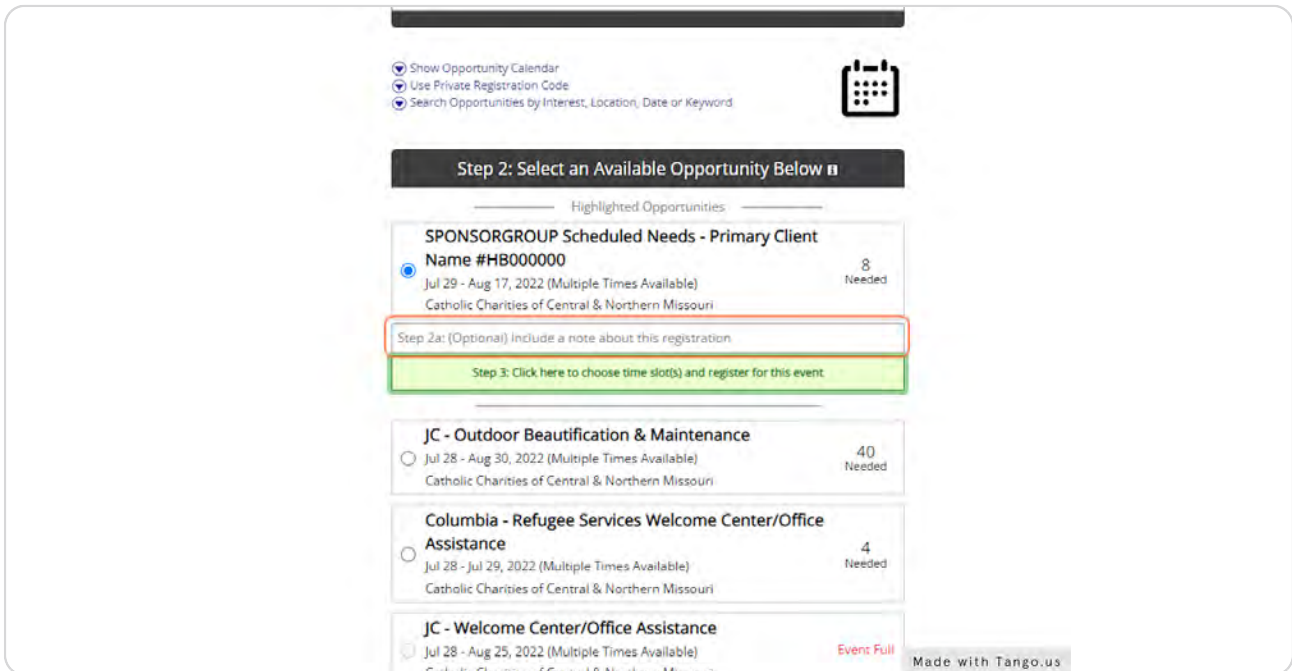
Made with Tango.us

STEP 4

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 onboarded 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.



The screenshot displays a web interface for selecting volunteer opportunities. At the top, there are three filter options: 'Show Opportunity Calendar', 'Use Private Registration Code', and 'Search Opportunities by Interest, Location, Date or Keyword'. A calendar icon is positioned to the right of these filters. Below the filters is a dark header bar that reads 'Step 2: Select an Available Opportunity Below'. Underneath this header, the section is titled 'Highlighted Opportunities'. The first opportunity listed is 'SPONSORGROUP Scheduled Needs - Primary Client' with a radio button selected. It includes the name '#HB000000', the dates 'Jul 29 - Aug 17, 2022 (Multiple Times Available)', and the organization 'Catholic Charities of Central & Northern Missouri'. A red box highlights a text input field labeled 'Step 2a: (Optional) Include a note about this registration'. Below this field is a green button that says 'Step 3: Click here to choose time slot(s) and register for this event'. Two other opportunities are listed below: 'JC - Outdoor Beautification & Maintenance' (40 Needed) and 'Columbia - Refugee Services Welcome Center/Office Assistance' (4 Needed). The third opportunity, 'JC - Welcome Center/Office Assistance', is marked as 'Event Full'. A 'Made with Tango.us' watermark is visible in the bottom right corner of the screenshot.

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.

▼ Show Opportunity Calendar
▼ Use Private Registration Code
▼ Search Opportunities by Interest, Location, Date or Keyword

Step 2: Select an Available Opportunity Below

Highlighted Opportunities

SPONSORGROUP Scheduled Needs - Primary Client
Name #HB000000 8 Needed
Jul 29 - Aug 17, 2022 (Multiple Times Available)
Catholic Charities of Central & Northern Missouri

Step 2a: (Optional) Include a note about this registration

Step 3: Click here to choose time slot(s) and register for this event

Made with Tango.us

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).

- Primary Client Name #HB000000

Select an Available Slot Below

<u>Date/Time & Details</u>	<u>Volunteers Needed</u>	<u>View List</u>
<input type="checkbox"/> Fri, Jul 29, 2022 - 3:20 PM to 5:35 PM Medical Appt (child) Compass Grant	2	View List
<input type="checkbox"/> Mon, Aug 1, 2022 - 3:15 PM to 5:30 PM Budget Mtng (PA) CCCNMO Grant	2	View List
<input checked="" type="checkbox"/> Tue, Aug 9, 2022 - 2:45 PM to 5:00 PM Basic Needs (school supply shopping) Walmart Grant	2	View List
<input type="checkbox"/> Wed, Aug 17, 2022 - 3:15 PM to 5:30 PM Education Asst (sch open house) Elem Sch Grant	2	View List

Made with Tango.us

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.

The screenshot displays a registration interface. At the top, there is a table with two rows of time slots. The first row is selected with a blue checkmark. Below the table is a dark grey bar with the text "Include a note about this registration" and a small icon. Underneath this bar is a text input field labeled "Optional Registration Note". At the bottom of the form, there are two buttons: a green "Register" button with an orange border and a grey "Cancel" button. A small watermark "Made with Tango.us" is visible in the bottom right corner of the screenshot.

<input checked="" type="checkbox"/>	Tue, Aug 9, 2022 - 2:45 PM to 5:00 PM Basic Needs (school supply shopping) Walmart Grant	2	View List
<input type="checkbox"/>	Wed, Aug 17, 2022 - 3:15 PM to 5:30 PM Education Asst (sch open house) Elem Sch Grant	2	View List

Include a note about this registration ⓘ

Optional Registration Note

[Register](#) [Cancel](#)

Made with Tango.us

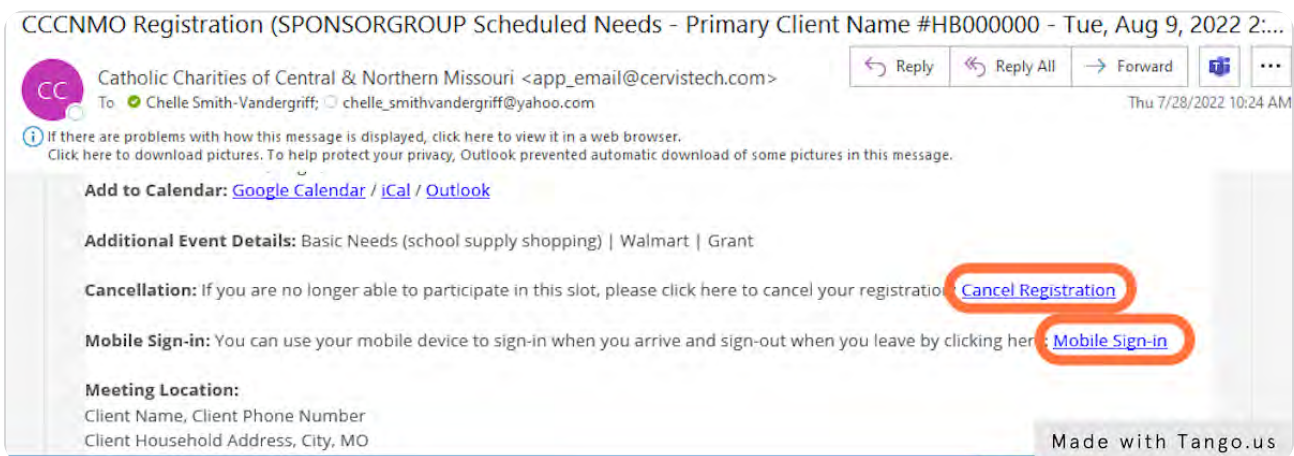
STEP 8

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.

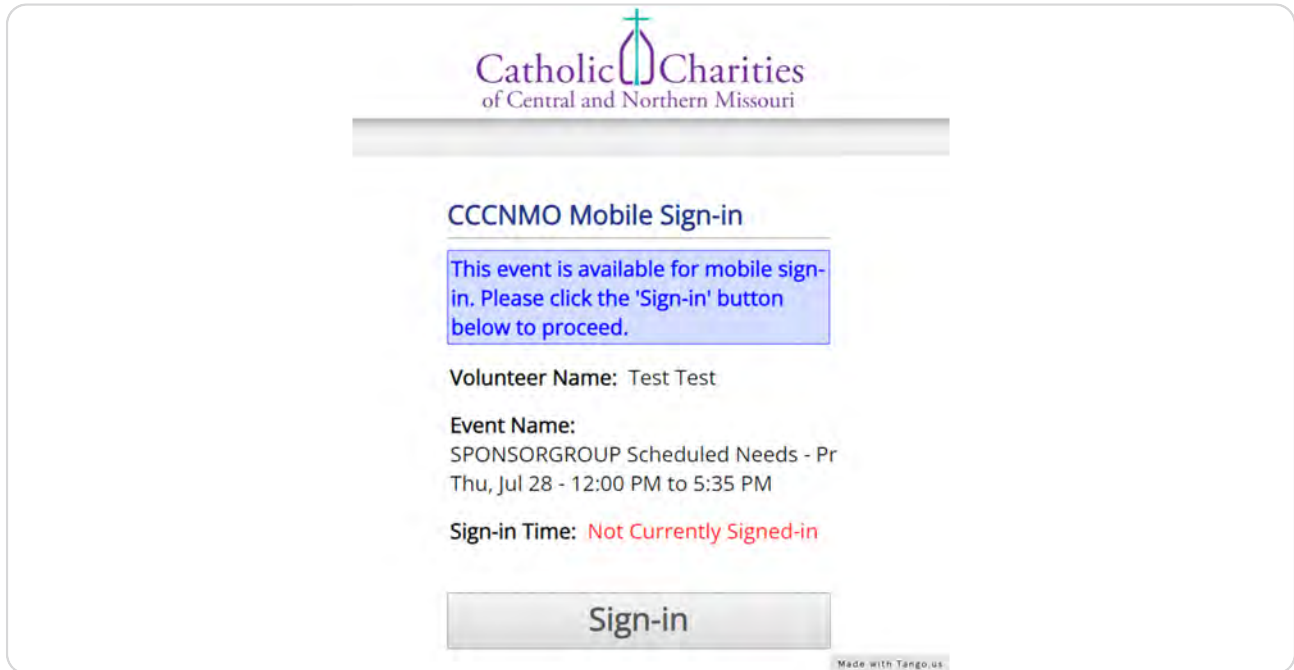
In addition to necessary details (including clients name(s), address, and contact information) both emails will contain a cancellation link and a mobile sign-in link.



STEP 9

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.



The screenshot shows a mobile sign-in interface for Catholic Charities of Central and Northern Missouri. At the top is the organization's logo, which includes a stylized cross and the text "Catholic Charities of Central and Northern Missouri". Below the logo is a horizontal separator line. The main heading is "CCCNMO Mobile Sign-in". A blue-bordered box contains the text: "This event is available for mobile sign-in. Please click the 'Sign-in' button below to proceed." Below this box, the following information is displayed: "Volunteer Name: Test Test", "Event Name: SPONSORGROUP Scheduled Needs - Pr Thu, Jul 28 - 12:00 PM to 5:35 PM", and "Sign-in Time: Not Currently Signed-in". At the bottom center is a large grey button labeled "Sign-in". A small watermark "Made with Tango.us" is visible in the bottom right corner of the page.

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.



The screenshot displays the "CCCNMO Mobile Sign-in" interface. At the top, a green message box states: "You have successfully signed-in to the event listed below." Below this, the following information is displayed:

- Volunteer Name:** Test Test
- Event Name:** SPONSORGROUP Scheduled Needs - Pr
Thu, Jul 28 - 12:00 PM to 5:35 PM
- Sign-in Time:** Thu, Jul 28 - 11:25 AM

There are two main input sections:

- Miles Driven:** A text input field with a numeric keypad. Below it, instructions read: "Enter the total number of miles driven. Use the Notes field to provide a brief description of the transportation services provided (who or what was transported, where, etc.)."
- Cash/In-Kind Donations:** A text input field with a numeric keypad. Below it, instructions read: "Enter 0 if no contribution was made. If cash/in-kind contributions (non-reimbursed) were made, enter the total cost of the contribution. Use the Notes field to provide a brief description of the contribution provided (item, quantity, store, etc.)."

Each input section has a "Notes: (Optional)" text area below it. At the bottom of the form is a large "Sign-out" button. A small "More with TextKit" logo is visible in the bottom right corner of the form area.

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 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.

The screenshot shows a web form titled "Cancel Event Registration". At the top, there is a blue information box with a white 'i' icon and the text: "Please review the information below and click the 'Click here to cancel registration' button to proceed with canceling your registration." Below this, the form fields are as follows:

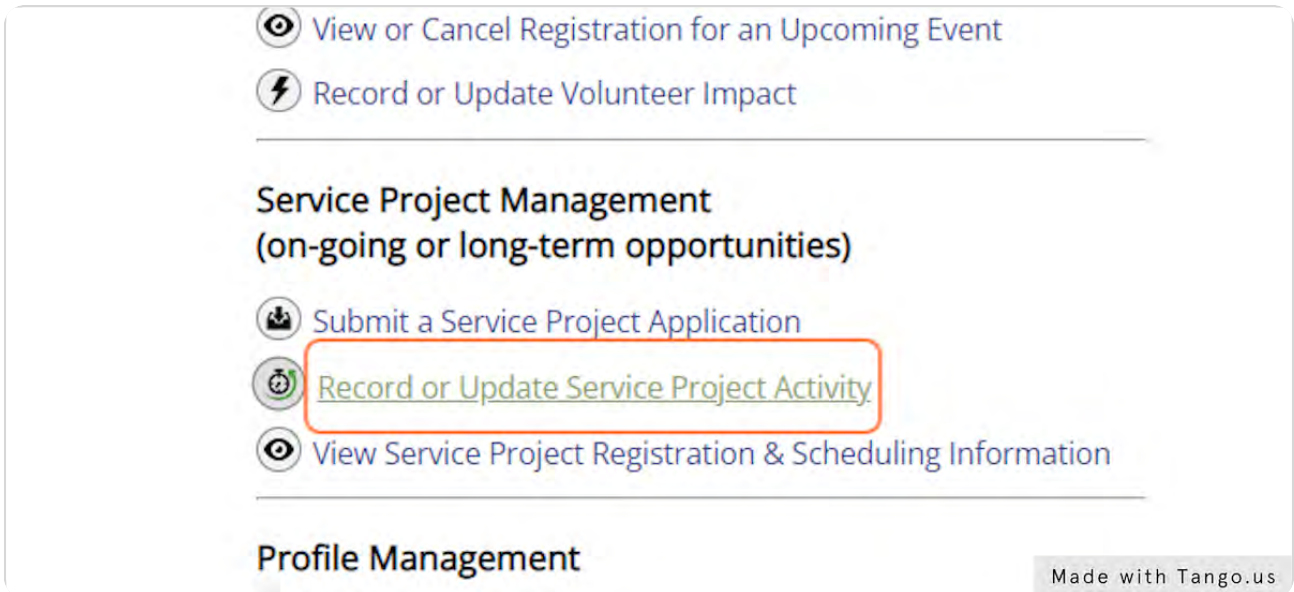
- Volunteer Name:** Test Test
- Opportunity Name:** SPONSORGROUP Scheduled Needs - Primary Client
Name #HB000000
-- Medical Appt (child) | Compass | Grant
- Start Date/Time:** Thu, Jul 28, 2022 - 12:00 PM
- Reason for Canceling:** (Optional) [Text input field]

At the bottom of the form, there are two buttons: a larger grey button labeled "Click here to cancel registration" and a smaller grey button labeled "< Go to Event Listing". In the bottom right corner of the form container, there is a small text label "Made with Tango.us".

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.



The screenshot shows a sidebar menu with the following items:

- [View or Cancel Registration for an Upcoming Event](#)
- [Record or Update Volunteer Impact](#)
- Service Project Management (on-going or long-term opportunities)**
 - [Submit a Service Project Application](#)
 - [Record or Update Service Project Activity](#) (highlighted with a red box)
 - [View Service Project Registration & Scheduling Information](#)
- Profile Management**

Made with Tango.us

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 1: Select a Volunteer Below ▾

Test Test ▾

Step 2: Select a Service Project Below ▾

SPONSORGROUP - Service Project

Jan 1, 2022 - Jan 1, 2027

Catholic Charities of Central & Northern Missouri

Step 3: Enter your Activity Details Below

Service Date:* [i]

Service Hours:* [i]

Notes (1000 character max): [i]

Made with Tango.us

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 3: Enter your Activity Details Below

Service Date:* [1]

Service Hours:* [1]

Notes (1000 character max): [1]

[Step 4: Record Service Project Activity](#)

Current Profile Service Project Activity

<input type="checkbox"/>	Name	Service Project	Service Date	Service Hours	Notes
--------------------------	------	-----------------	--------------	---------------	-------

[Portal Home](#)

Made with Tango.us


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 4: Record Service Project Activity

Current Profile Service Project Activity

<input type="checkbox"/>	Name	Service Project	Service Date	Service Hours	Notes
<input type="checkbox"/>	Test T.	SPONSORGROUP - Service Project	Jul 28, 2022	1.00	

✖ Remove Selected Service Project Activity

< Portal Home




Made with Tango.us

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.

(one-time or short-term opportunities)

-  [Register for an Upcoming Event](#)
-  [View or Cancel Registration for an Upcoming Event](#)
-  [Record or Update Volunteer Impact](#)

**Service Project Management
(on-going or long-term opportunities)**

-  [Submit a Service Project Application](#)
-  [Record or Update Service Project Activity](#)

Made with Tango.us

STEP 19

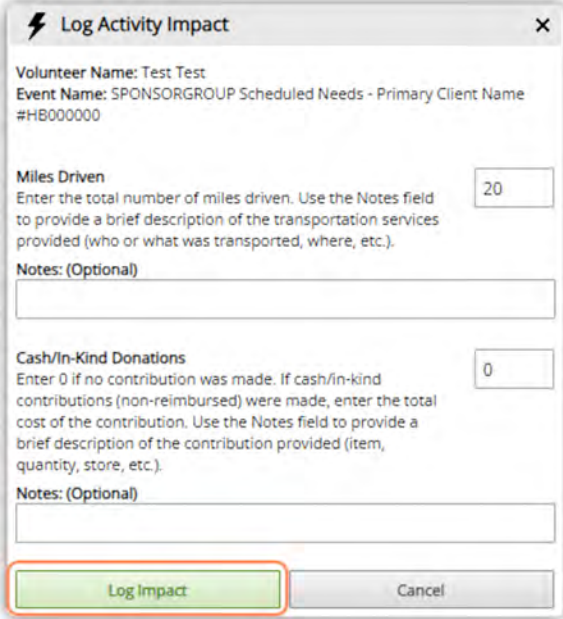
Log or Update Impact

Click on Log Impact or Update Impact

The screenshot displays a web interface titled "Impact Logging Opportunities" with a search bar at the top. Below the title, there is a section for "Registration Information" containing the following text: "SPONSORGROUP - Service Project", "Wed, May 18, 2022", "Catholic Charities of Central & Northern Missouri / Catholic Charities Refugee Services", and "Test (30 Participants)". To the right of this text is a green "Log Impact" button. Below this is a yellow-highlighted section for "SPONSORGROUP Scheduled Needs - Primary Client Name #HB000000" with the text: "Dental Appt (PA wife) | Compass | MG22", "Fri, Jul 8, 2022 - 3:20 PM to 5:35 PM", "Catholic Charities of Central & Northern Missouri / Catholic Charities Refugee Services", and "Test T.". To the right of this text is a red-bordered "Log" button. A tooltip is visible over this button, containing the text "Log Volunteer Impact" and "Click here to log Volunteer impact for this event.". Below the yellow section is another "SPONSORGROUP - Service Project" entry with the text: "Thu, Jul 28, 2022", "Catholic Charities of Central & Northern Missouri / Catholic Charities Refugee Services", and "Test T.". To the right is a green "Log Impact" button. The final entry is for "SPONSORGROUP Scheduled Needs - Primary Client Name #HB000000" with the text: "Medical Appt (child) | Compass | Grant", "Thu, Jul 28, 2022 - 12:00 PM to 5:35 PM", "Catholic Charities of Central & Northern Missouri / Catholic Charities Refugee Services", and "Test T.". To the right is a green "Log Impact" button. At the bottom right of the interface, there is a small grey box that says "Made with Tango.us".

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.



Log Activity Impact [X]

Volunteer Name: Test Test
Event Name: SPONSORGROUP Scheduled Needs - Primary Client Name
#HB000000

Miles Driven
Enter the total number of miles driven. Use the Notes field to provide a brief description of the transportation services provided (who or what was transported, where, etc.).

20

Notes: (Optional)

Cash/In-Kind Donations
Enter 0 if no contribution was made. If cash/in-kind contributions (non-reimbursed) were made, enter the total cost of the contribution. Use the Notes field to provide a brief description of the contribution provided (item, quantity, store, etc.).

0

Notes: (Optional)

Log Impact Cancel

Made with Tango.us



Catholic Charities
of Central and Northern Missouri