In Partnership with

Village Special Features Manual

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Chapter 1 – Introduction

Welcome to ClubExpress, the most powerful tool on the Internet for managing villages.

ClubExpress was designed to allow membership based organizations to move their administration entirely online. ClubExpress handles your organization's membership database, signups and renewals, committees, documents, discussions, event calendar and registration and financial management using the Internet.

Every organization that signs up for ClubExpress gets its own web site with content to promote the organization and its activities to visitors and potential members. Members log in to see members-only content, including a complete membership directory and profile. Other functions such as discussion forums are also reserved for members-only. When administrators log in, they have access to additional functions for managing the organization, including financial tracking, web site configuration, event management and other tasks.

For villages that are members of the Village to Village Network, ClubExpress includes the following special features:

- A Contact Log function to track every contact with members and non-members, whether by visit, phone, email, fax, letter or other. Contacts can be assigned a category, priority, status and responsible person, and can be managed screen or in reports. (Chapter 2)

- A Services function to track the services provided to members. Services are organized into categories and each service is provided through service providers who can be contracts, member volunteers or non-member volunteers. Services are also assigned a status and followup date, and the system includes a convenient scheduler screen, Daily ToDo list and multiple reports and data exports to track services. (Chapter 3)

- An Additional Contacts feature to track the additional contacts for members, including family, doctors, attorneys, care givers and others. (Chapter 4)

Over time, other features will be added, in response to feedback received from members of the Village to Village Network.

THIS MANUAL

This manual documents only the village-specific features in ClubExpress. It should be read in conjunction with the primary Administrator and User Manuals, which can be separately downloaded from your website.

Chapter 2 – Contact Log

INTRODUCTION

This chapter describes the Contact Log function, which allows village administrators to manage every contact with members and non-members.

To access the Contact Log for members, go to **Control Panel – Member Manager**.

To access the Contact Log for non-members, go to **Control Panel – Non-Member Database**.

MEMBER CONTACT LOG

When you search for a member in the Member Manager, you will see a screen similar to the following:

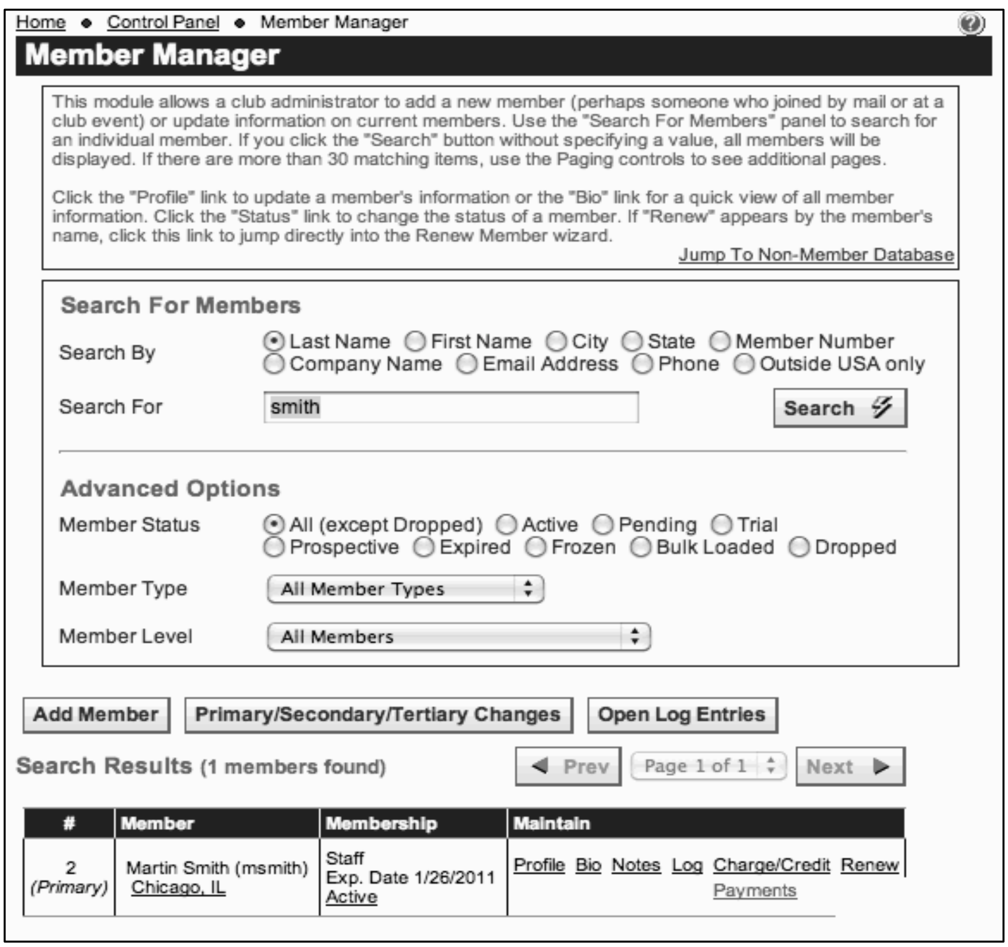

Figure 2.1 – Member Manager

Beside each member in the Maintain column, one of the options is Log. It allows you to view and maintain log entries for each member. When you select this option you will see a screen similar to the following:

Figure 2.2 – Member Contact Log

Use the Search options at the top to filter the list by Open Contacts Only or All Contacts. You can also control the sort order from among four options. Click the **Search** button to refresh the list.

For each contact, the screen shows the date, title, responsible member, contact type, category, status, and priority. Responsible members and categories can be configured for each village (see below for more information.) The system will show 30 contacts on each page; if a member has more than 30 contacts, the navigation buttons allow you to move from page to page. Click the Edit link to modify an existing contact. Click the Delete link to remove a contact entry.

Add Contact Log Entry

Click the **Add Contact** button to add a contact entry. You will see the following screen:

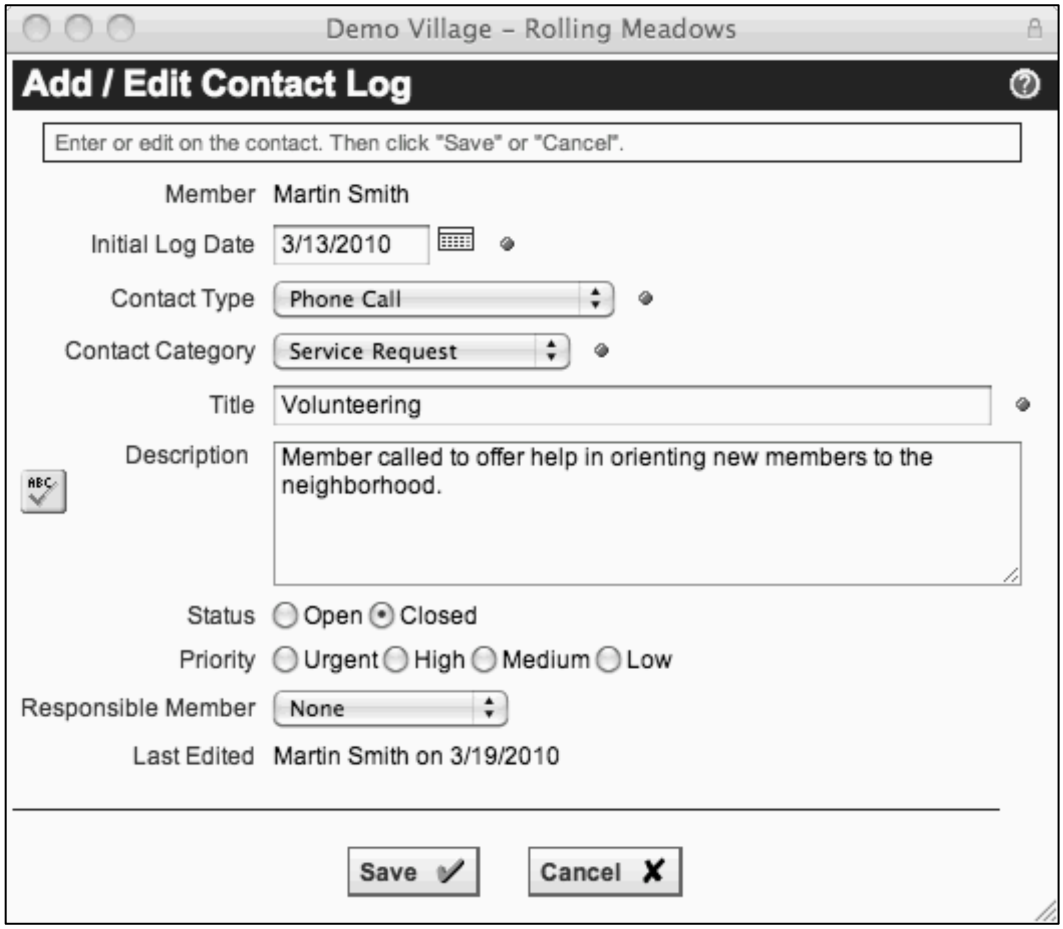

Figure 2.3 – Add Contact

Because you created this contact from a member's Profile, the member name is already filled in. The following additional fields are available:

- Contact date (required).
- Followup date. Any date entered here is used in the followup report and ToDo list to remind you of when a followup is required.
- Contact Type (required). Select an option from the drop-down list. All basic contact types should be available but let ClubExpress know if you need an additional type added.

- Contact Category (required), Used for reports. The system includes a number of built-in categories but you can add your own categories (see below for more information.)

- Title (required) and Description. Click the Spellcheck button to check your spelling in the Description field.

- Status – either Open or Closed.

- Priority – Urgent, High, Medium or Low.

- Responsible Member. Use this option to track who is responsible for handling this issue or for following up with the member.

Click **Save** to save the new contact log entry and return to the main listing, or **Cancel** to return without saving.

When you click the Edit link, the same screen is shown, with the additional information of when the contact was last edited.

Click **Return to Previous Page** to return to the Member Manager.

OPEN CONTACT LOG ENTRIES

The Member Manager also has an **Open Log Entries** button. Clicking this button displays a similar grid screen showing all open contact log entries, together with some additional functions. You will see a screen similar to the following:

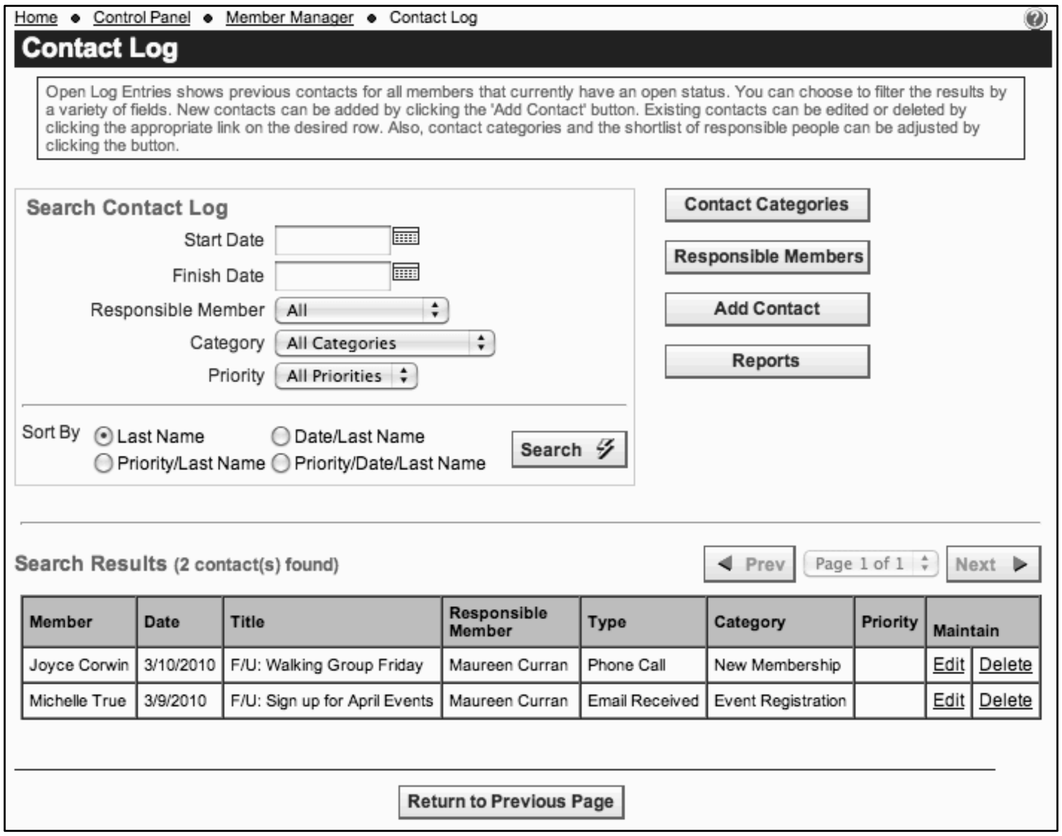

Figure 2.4 – Open Log Entries

The search panel has some additional options to help narrow the list, but otherwise it behaves the same way as the search panel for an individual member. The grid has the same columns with an addition in column 1: the member for whom the contact log entry was created.

Contact Categories

Click **Contact Categories** to modify your contact categories. You will see a list similar to the following:

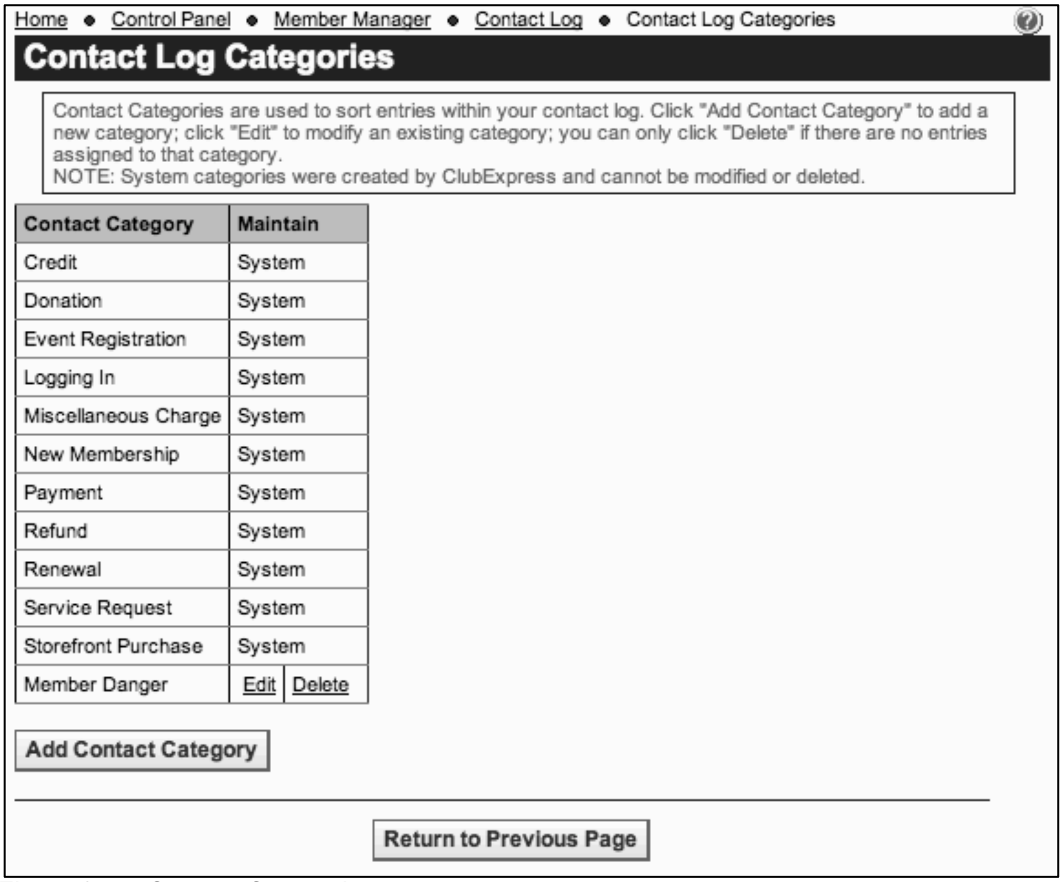

Figure 2.5 – Contact Categories

The system includes a number of built-in categories which cannot be changed. You can also add your own categories by clicking the **Add Contact Category** button. It will display a simple popup to enter and save a new category. These categories can be edited and deleted if they have not been used.

Responsible Members

Click **Responsible Members** to define the list of members (usually staff people and volunteers) who are responsible for following up on open log entries. (In the ClubExpress model, everyone who works at a village and who needs some level of admin access to member data must be in the membership database, perhaps with a special member type—for example, “Staff”.)You will see a list similar to the following:

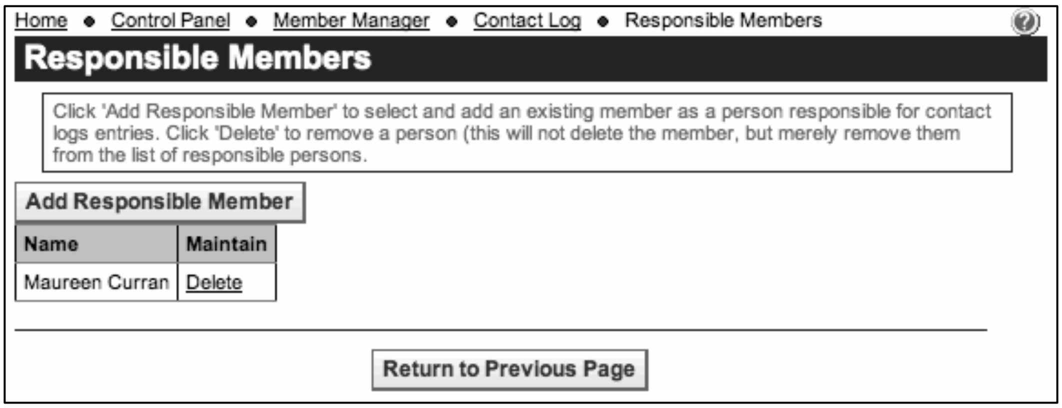

Figure 2.6 – Responsible Members

Click the **Add Responsible Member** button to display the standard ClubExpress member selector. You only need to enter the first few letters of the last name and press *[Enter]* to see a list of matching members. Select one and click **Select** to add that member, or click **Cancel** to close without making a selection.

Add Contact

Click the **Add Contact** button to add a new contact log entry. Because you displayed this dialog from the Open Log Entries screen, the member name is not pre-filled and you need to select it. Click **Select Member** to display the same member selector described above.

Otherwise, this dialog behaves the same way as already described.

Reports

Select this option to display a standard ClubExpress Report wizard. The system lists a number of reports on open log entries. Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

NON-MEMBER CONTACT LOG

To view contact log entries for non-members, go to **Control Panel – Non-Member Database.** Use the Search options to limit which non-members are shown, or just click the **Search** button to display the whole list.

To display the Contact Log screen for a non-member, click the Maintain link and select **Log** from the popup menu (it's near the bottom.) The resulting screen is identical to the Log screen for a member.

Open Contact Log Entries

The non-member database screen also has an **Open Log Entries** button. Clicking it displays the same screen described above for members but this time showing open log entries for non-members. All other buttons and functions are the same.

Chapter 3 – Member Services

INTRODUCTION

A fundamental purpose of villages is to help members live independently in their homes by providing them with services, including transportation, financial advice, computer help, referrals to trusted contractors, and other types of support. For villages, ClubExpress includes a powerful Services function that allows you to track services by category, the providers and the services that they provide, service requests and followup actions.

SERVICE SCHEDULER

To access the Services function, go to **Control Panel – Village Services**. You will see a screen similar to the following:

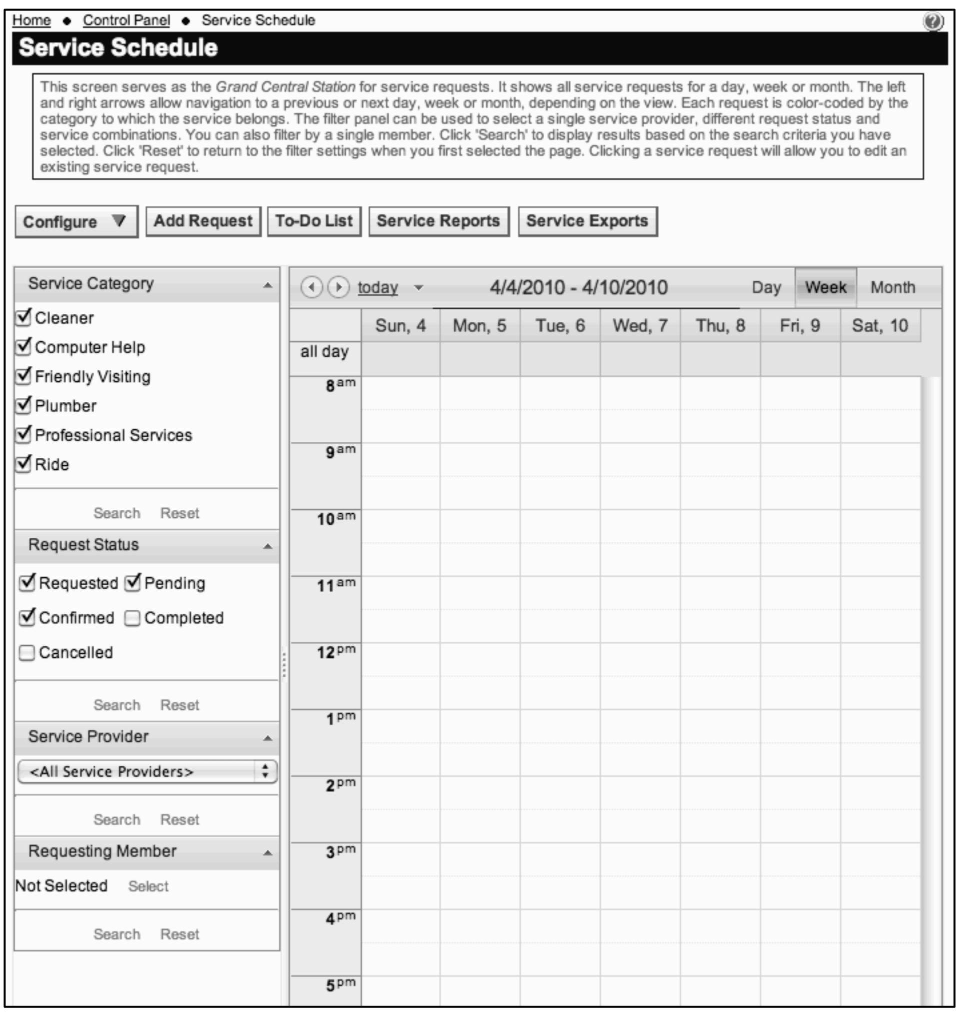

Figure 3.1 – Service Scheduler

Action buttons are listed across the top; these are described in detail below. On the right side is a calendar object that shows the services scheduled by day, week or month. Use the options in the top right corner of the calendar to change the view. Use the arrows in the top left corner to move forward or backward or to jump to Today. Click the down arrow to display a popup calendar to select a specific day. In “Week” or “Month” mode, you can click on a date to switch to “Day” mode for that day.

Services are color coded by category. Click a service to edit the properties of that service. If you hover your mouse over the service an “X” icon will appear, allowing you to delete the service; you will be asked to confirm this action.

Filtering the Services Shown

Selecting different options in the left panel, then clicking the Search link, will filter the services shown in the calendar. You can also click the Reset link to remove filtering criteria and reset to the default configuration:

- All categories
- Services with a Requested, Pending or Confirmed status only
- All service providers
- All members

Click **Service Category** to check or uncheck which service categories should be shown. Click **Request Status** to check or uncheck which status values should be included in the search. Click **Service Provider** then click the drop-down to show only services being provided by one service provider. Click **Requesting Member** then click the Select link to show only services being provided to one member.

Note that some of these filtering options (service provider and requesting member in particular) are especially useful in “Month” view, to see everything being done for a specific member or by a specific service provider in one month.

CONFIGURE BUTTON

Click the **Configure** button to see a drop-down menu with the following configuration options:

- Service Categories
- Services
- Service Providers
- Service Options

Service Categories

Select **Configure – Service Categories** to update the categories into which your services are organized. You will see a screen similar to the following:

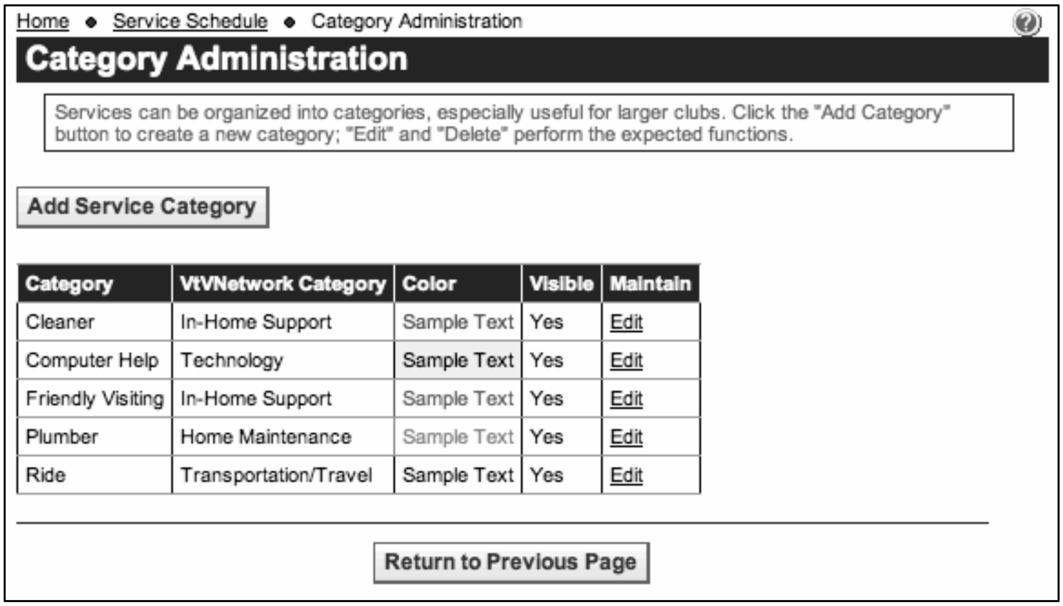

Figure 3.2 – Service Categories

You can define any categories you want and each can be color coded for the Service Scheduler. Click **Add Service Category** to create a new category. You will see the following dialog screen:

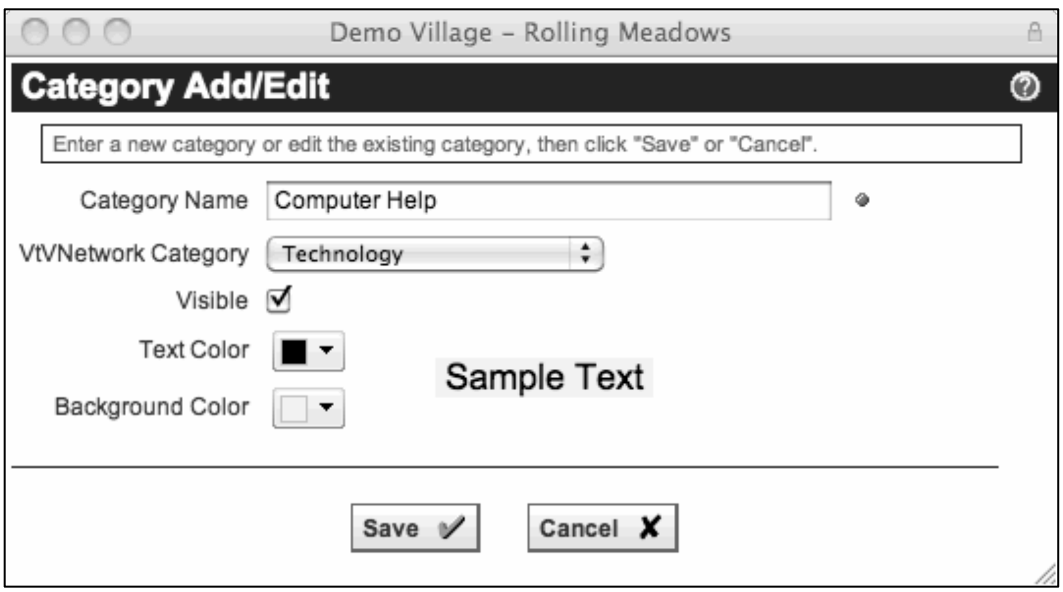

Figure 3.3 – Add/Edit Service Category

Enter a category name. You must also select the most appropriate VtVNetwork category; the network will use these “higher-level” categories for reporting and data analysis.

The **Visible** flag should initially be checked. However, it can be unchecked in the future if you need to stop offering a particular type of service.

You can also select a text color and background color for each category. Clicking one of the color options displays a color picker with multiple options for selecting a color. Use the “Web Palette” option to pick a color that can safely be rendered on all types of computers and browsers.

Click **Save** to save your changes and return to the Service Categories screen, or **Cancel** to return without saving.

Services

Select **Configure – Services** to update the services provided by your village. You will see a screen similar to the following:

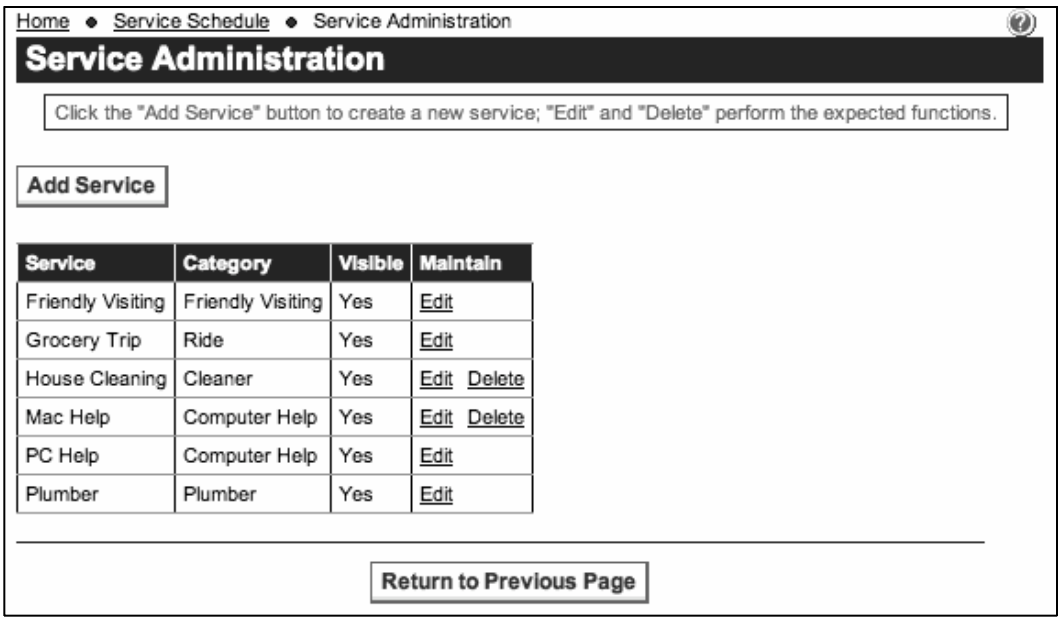

Figure 3.4 – Services

The grid shows services, the category into which is service is organized, and whether that service is visible. As with categories, use the Visible flag to turn services off which are no longer being offered, or which are seasonal.

Click the Edit link to modify a service. A Delete link will only be displayed if that service has never been scheduled. Click the **Add Service** button to create a new service. You will see the following dialog screen:

Figure 3.5 – Add/Edit Service

Specify the service name, category and whether it should be visible (available to be selected.) Click **Save** to save your change and return to services list, or **Cancel** to return without saving.

Service Providers

Select **Configure – Service Providers** to update the contractors and volunteers (member and non-member) who provide services to your members. You will see a screen similar to the following:

Figure 3.6 – Service Providers

The system supports three types of service providers: contractors, member volunteers, and non-member volunteers. Each behaves slightly differently. Use the Filter and Category options then click **Search** to limit the service providers shown in the grid.

Each service provider includes their name and type, whether they are visible, the most recent date that they provided a service, and their current average rating. The options in the Maintain column are described below.

In the grid click the Edit link to modify information on an existing service provider.

Click one of the "Add" buttons to add a service provider of the specified type.

Add Contractor

When you click the **Add Contractor** button, you will see the following popup dialog box:

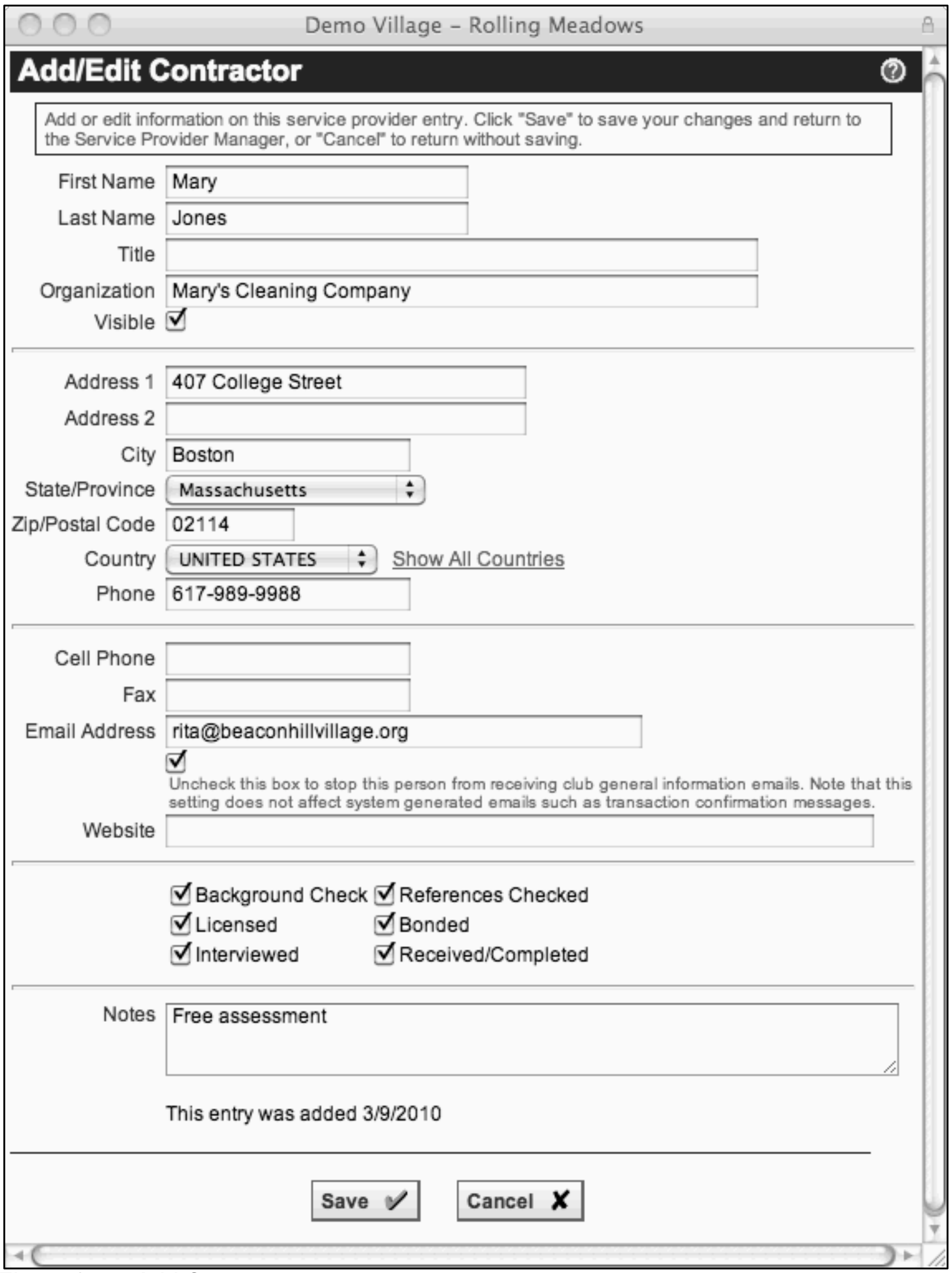

Figure 3.7 – Add Contractor

None of this information is required but we recommend you enter either a company name or the first name and last name of the contractor. Use the "Visible" flag to control whether this contractor is currently active for your village.

The six checkboxes near the bottom of the screen can be used to assist you in tracking certain actions you take when "vetting" a service provider. Some jurisdictions may also require that these checks be performed before you can provide this information to village members.

Click **Save** to save the new contractor into the database and return to the main screen, or **Cancel** to return without saving.

Add Member Volunteer

Many villages require members to do some volunteer work for the village as part of their commitment to being a member. When you click the **Add Member Volunteer** button, you will see the following popup dialog box:

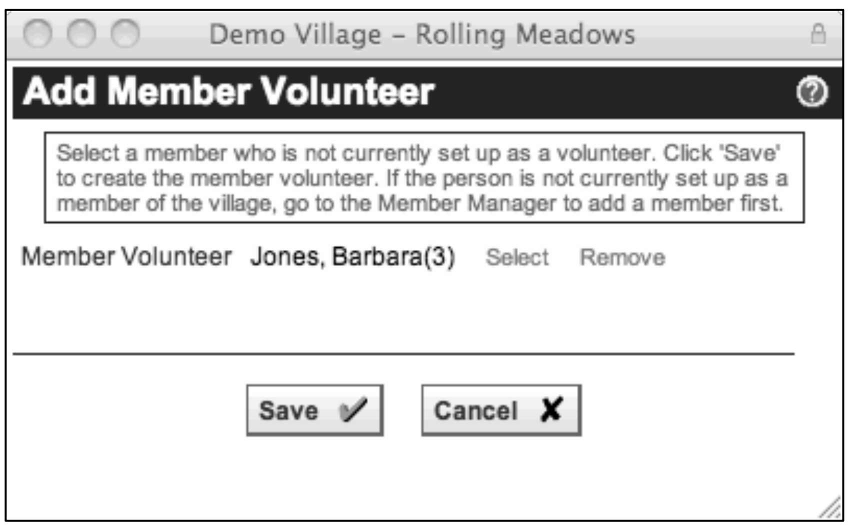

Figure 3.8 – Add Member Volunteer

Click the Select link to display the standard member selector. Select a member and click **Select**. Click **Save** to add this member to the roster of volunteers and return to the main screen, or **Cancel** to return without saving.

Add Non-Member Volunteer

When you click the **Add Non-Member Volunteer** button, you will see the same dialog box as for a Contractor. When you click the Save, the information is stored in the database but flagged as a volunteer who does not receive payment for his or her services, vs. a contractor who generally does receive payment, whether from the village or the member.

Services

In the grid, click the Services link to specify which services each service provider provides. You will see a popup dialog similar to the following:

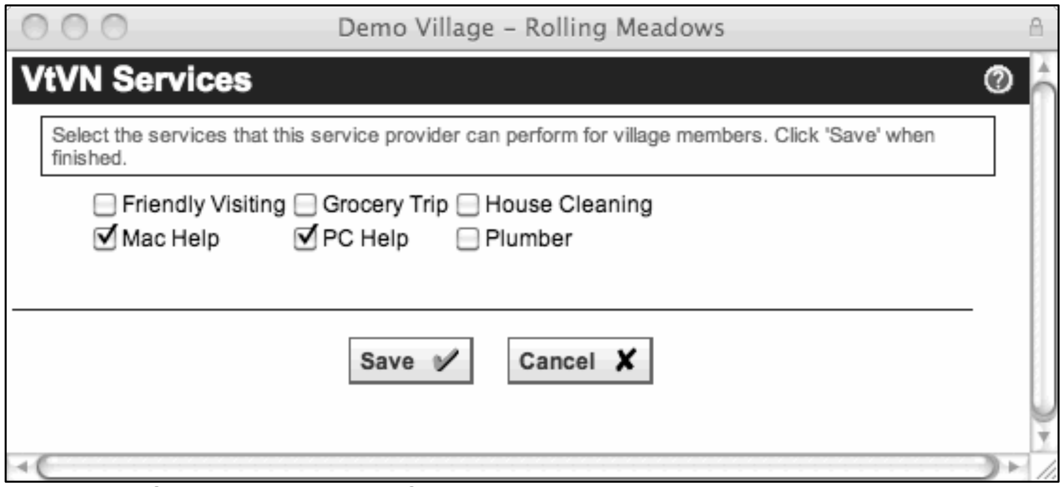

Figure 3.9 – Services provided by Service Providers

You can check any number of services, then click **Save** to save your changes and return to the main screen, or **Cancel** to return without saving.

History

In the grid, click the History link to view a list of all services provided by this service provider. You will see a popup listing in descending date order, with the most recent services at the top. Each listing shows the member for whom the service was provided, the date, rating and comments. The specific details of the service are not shown, for confidentiality reasons. Click **Done** to close the popup and return to the main screen.

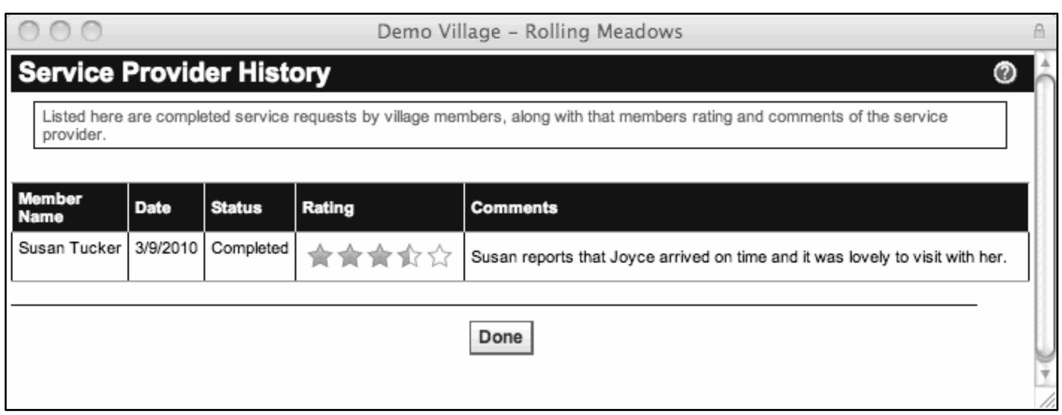

Figure 3.10 – Service Provider History

ADD SERVICE REQUEST

Click the **Add request** button to create a new service request. You will see the following screen:

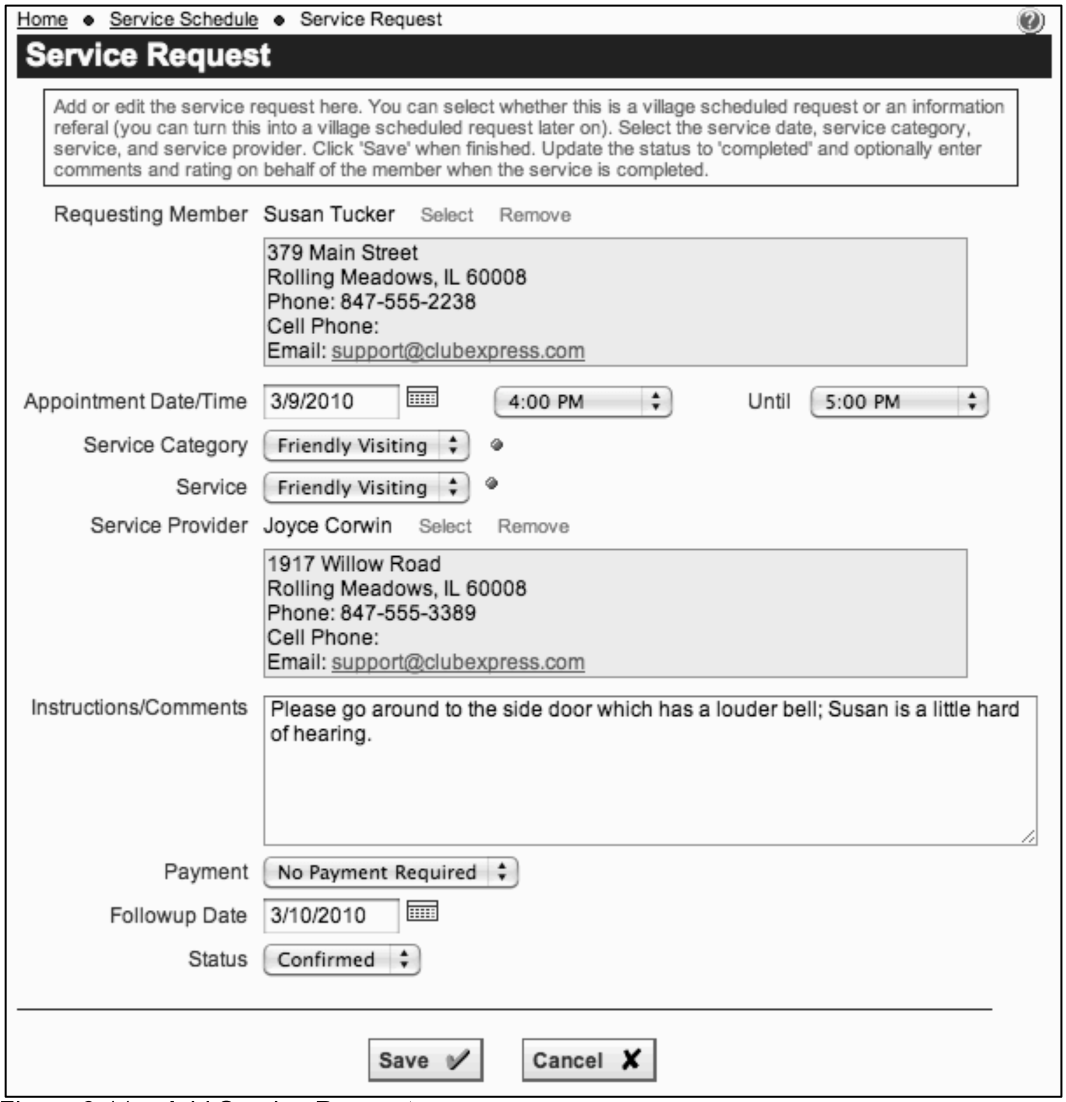

Figure 3.11 – Add Service Request

There are two types of service requests and the screen behaves slightly differently for each:

- **Village Scheduled** – the village makes all the arrangements with the service provider. The screen includes date fields to schedule the service.

- **Information Referral Only** – the village recommends one or more service providers but it's up to the member to call and make specific arrangements. The screen does not include date fields.

Select the requesting member by clicking the Select link. When you do so, the screen refreshes to show the member's address and contact information.

When you select the Service Category, the list of Services changes dynamically to show only services in that category. When you select a Service, the list of Service Providers changes dynamically to show only contractors and volunteers who provide that service. Click the Select link to display a screen similar to the following:

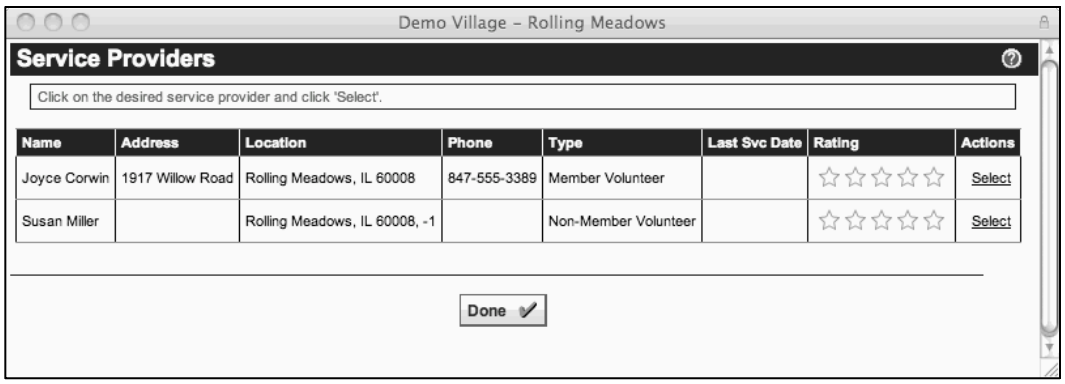

Figure 3.12 – Selecting a Service Provider

You will see basic information on service providers, together with their rating and date of last service for a village member. Click the Select link to select a provider and return to the main screen or **Done** to return without making a selection. If you selected a provider, full contact information is shown in a panel under the provider's name.

Payment

The Payment field is advisory only but it's used a record of who will be responsible for payments if any such are required.

Followup Date

When you enter a date in this field, an open Contact Log entry is created to remind you to followup with the member.

Status

There are five status values with the following meanings:

- **Requested** – the village member made this request himself or herself, through the system. See below for more information. This option is only available for village-scheduled services.
- **Pending** – this service is being set up but it has not yet been confirmed.

- **Confirmed** – this service is confirmed with both the member and service provider. This option is only available for village-scheduled services.
- **Completed** – this service has been performed. This status may also confirm that the member has been contacted to provide followup comments and a rating.
- **Cancelled** – this service was scheduled but the member later called to cancel. It stays in the database for reference purposes. (A full "Delete" option is also available on the main screen.)

Click **Save** to save the new service request and return to the Service Scheduler, or **Cancel** to return without saving.

Completing a Service Request

When you change a service request status to "Completed", the screen will change as shown below:

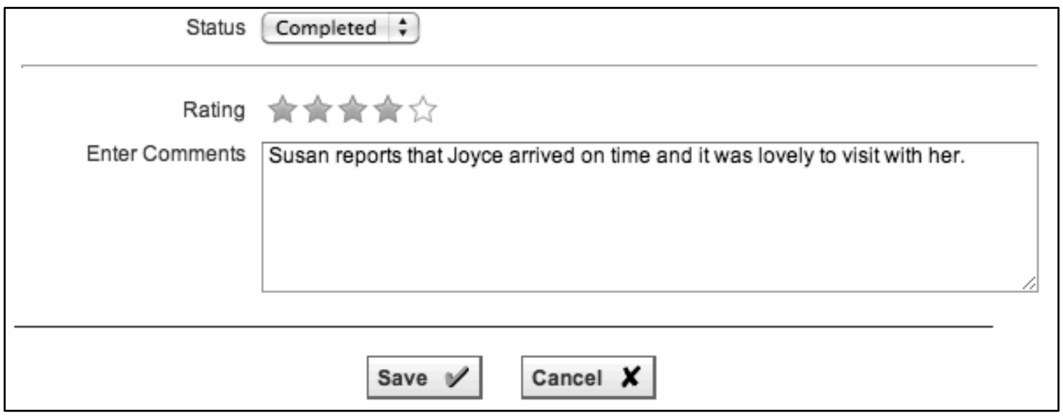

Figure 3.13 – Completing a Service Request

Ask the member how he or she would rate the service provided by this provider. Click the Rating stars to store this information. Each star can be clicked in full or half. You can also store any comments provided by the member.

Click **Save** to save these ratings and comments and return to the Service Scheduler, or **Cancel** to return without saving.

TO-DO LIST

Click the **To-Do List** button to see a screen showing open Contact Log and Service Request items. You will see a screen similar to the following:

Home • Service Schedule • VtVN Services

Village Admin To-Do List

The To-Do List combines open log entries in the top portion of the page with requested and pending service requests in the bottom portion of the page. From the contact log list, clicking 'Open' next to an entry will display that contact log entry's detail, so it can be updated. From the service requests list, clickin 'Open' next to an entry will display that service request's detail, so that it can be updated.

Contact Log

Priority	Date	Title	Member	Type	Maintain
High	3/3/2010	Walking Group Friday	Joyce Corwin	Phone Call	Open
Medium	3/15/2010	F/U: Plumber	Barbara Jones	Other	Open
Medium	3/13/2010	Volunteering	Martin Smith	Phone Call	Open
Medium	3/12/2010	F/U: PC Help	Stan Milton	Other	Open
Medium	3/12/2010	F/U: Plumber	Harry Parker	Other	Open
Medium	3/11/2010	Plumber	Harry Parker	Other	Open
Medium	3/11/2010	PC Help	Stan Milton	Other	Open
Medium	3/11/2010	PC Help	Barbara Jones	Other	Open
Medium	3/10/2010	F/U: Friendly Visiting	Susan Tucker	Other	Open
Medium	3/10/2010	Plumber	Barbara Jones	Other	Open
Medium	3/9/2010	Friendly Visiting	Susan Tucker	Other	Open
Low	3/8/2010	Sign up for April Events	Michelle True	Email Received	Open

Service Requests

Status	Request Date	Service	Requesting Member	Request Type	Maintain
Pending	3/9/2010	Friendly Visiting	Susan Tucker	Village Scheduled	Open

Return to Previous Page

Figure 3.14 – To-Do List

The top half of the screen shows open contact log items, organized by priority and then date. Click the Open link to open that item for editing. If you change the status to Closed, it will be removed from the list.

The bottom half of the screen shows Requested and Pending service requests, organized by status and then date. Click the Open link to open that item for editing. If you change the status to Confirmed, Completed or Cancelled, it will be removed from the list.

For both lists, you can click the member's name to display a popup with their contact information.

Click **Return to Previous Page** to return to the Service Scheduler.

SERVICE REPORTS

Click the **Service Reports** button to display a standard ClubExpress reports dialog, showing at least ten reports available for services data. Each report can be filtered by date range and can then be output in one of four different formats.

SERVICE EXPORTS

Click the **Service Exports** button to display a list of available data exports. Each export will be saved to your local computer in CSV (Comma Separated Values) format, which can be opened directly in Excel, Access and many other programs. Use this option to copy service information down to your local computer for more detailed analysis and reporting.

MEMBER PROFILE – SERVICE REQUEST HISTORY

When the Services function is enabled, members also have a special option in their **Profile** screen – Service Request History. Clicking this option displays a screen similar to the following:

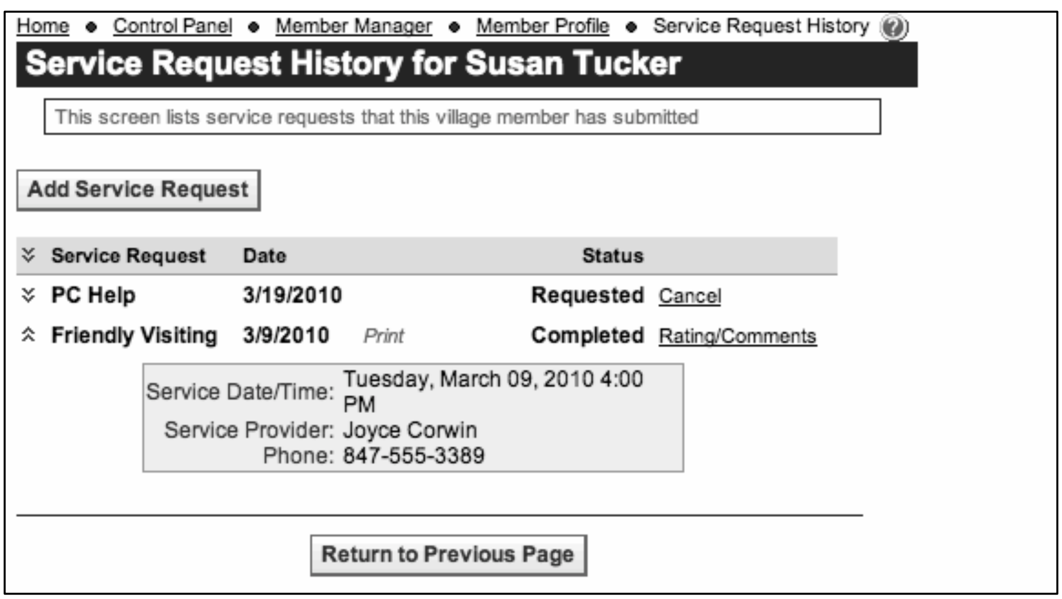

Figure 3.15 – Profile – Service Request History

For each service request, the system shows the request type, date and status. Clicking the double-down arrow displays more detailed information, including the service provider's name and phone number.

Clicking the Rating/Comments link allows the member to specify a rating and make comments. The following screen is displayed:

Figure 3.16 – Rating/Comments

Members can click the rating stars and make comments, then click **Save** to save their changes and return to the Profile screen, or **Cancel** to return without saving.

Add Service Request

Instead of making a phone call, members can also initiate their own service requests through the system. Members do not pick a service provider; that responsibility remains with the village office. But they can request a specific service. Clicking the **Add Service Request** button displays the following screen:

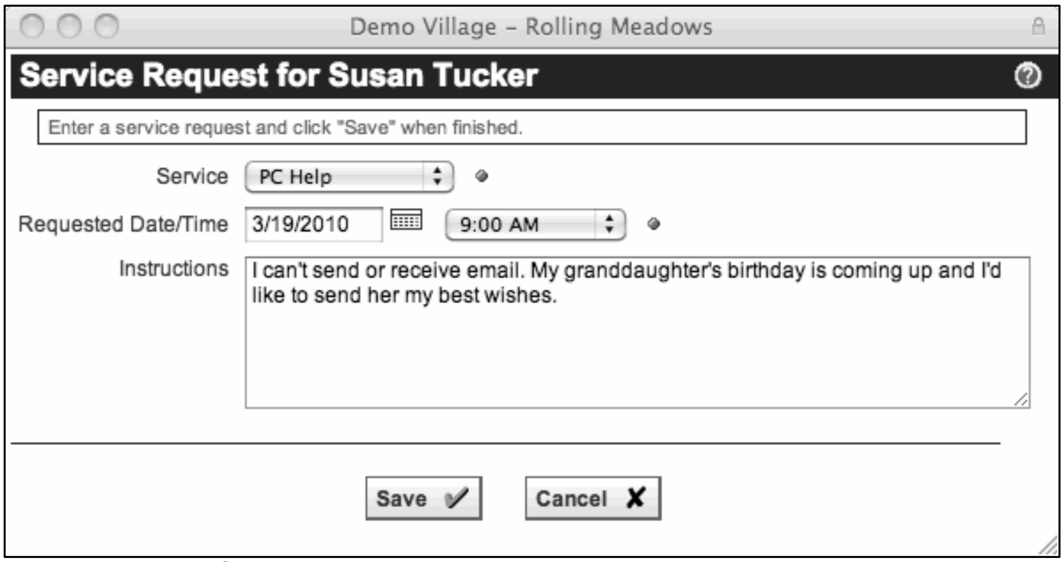

Figure 3.17 – Add Service Request by member

The member will select a service from the drop-down list and request a date and time. They can also enter comments and more detailed instructions. When they click **Save**, the service is saved with a "Requested" status and it's immediately visible to the village's admins. Requested services are *not* confirmed because the village still needs to screen the request and assign a service provider.

Chapter 4 – Member Additional Contacts

INTRODUCTION

An important function for villages is to track additional contacts for a member, so that village staff members know who to contact in the event of an emergency or questions about a member. Additional contacts include family members, medical and legal advisors, social workers and others who protect and look out for the member.

To access a member's additional contacts, go to **Control Panel – Member Manager** and search for the member. Click the Profile link in the Maintain column beside the member's name, then select Additional Contacts from the Personal Info section. You will see a screen similar to the following:

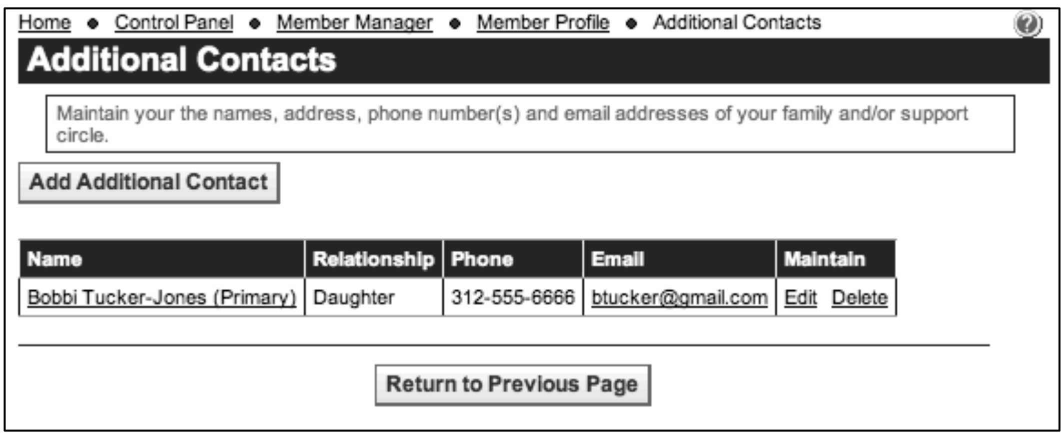

Figure 4.1 – Additional Contacts for a member

For each additional contact, the system shows the name, relationship, phone and email. The "primary" contact is also flagged. You can click the name to see more information such as their address. Click the Edit link to modify information on an additional contact, or Delete to remove an additional contact.

Add Additional Contact

Click the **Add Additional Contact** button to add a contact for a member. You will see the following screen:

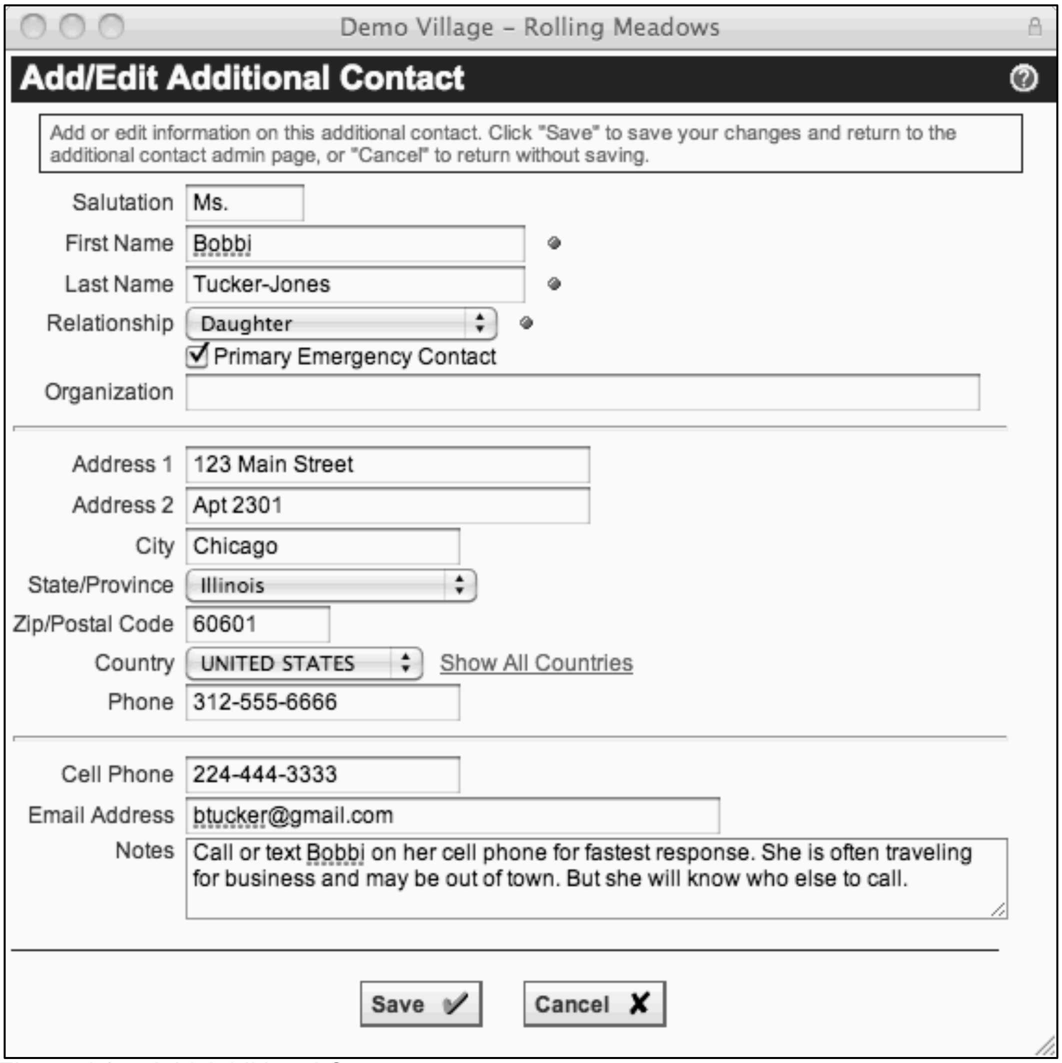

Figure 4.2 – Add Additional Contact

Only the first name, last name and relationship are required but we strongly encourage you to complete as much information as possible to make each additional contact entry as useful as possible.

Check the “Primary Emergency Contact” box to flag one person to be called in the event of an emergency.

The Relationship options are defined by ClubExpress. You should see every relationship you will need but if you need something added to the list, contact ClubExpress.

Click **Save** to save the new additional contact and return to the list screen, or **Cancel** to return without saving.

