

Fundraising

Use the **Fundraising form**, accessed from the **SC Daily log**, to record time spent Fundraising. Fundraising feeds into **Section 11** of the HUD report.

It is important to remember, when documenting and engaging in Fundraising efforts, that all **activities must relate to assisting the residents to age in place**.

Appropriate fundraising events **might include**: fundraising for a new piece of exercise equipment, a wheel chair ramp for the facility, or even for a computer center at the property you are working for.

Examples of fundraising that you **should not include**: holiday parties or the purchase of televisions, musical instruments, or bingo sets. These are not exhaustive lists of what is and isn't appropriate, but should serve as a guide when fundraising.

Create Fundraising

Create Fundraising

*Required Fields

*Service Coordinator:

Trainer, Misty

*Date:

Click Here to Select

*Event:

?

Duration:

?

:

hrs

mins

*Details (2,000 char. max)

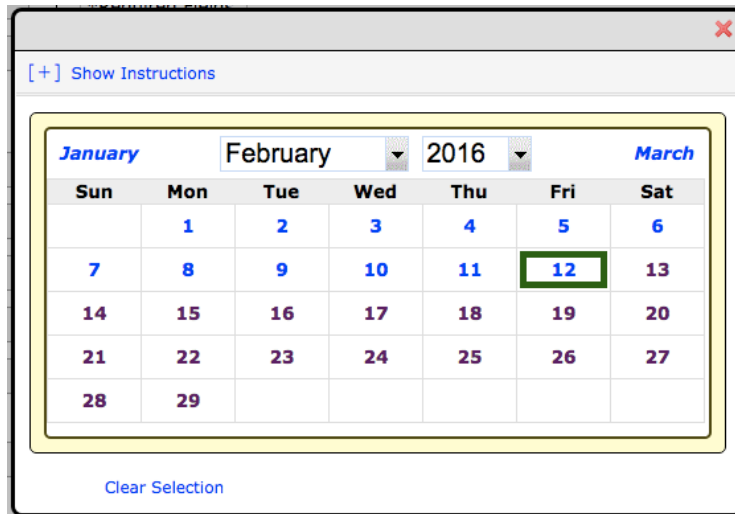
?

ABC

Submit

Cancel

► First, specify the date of the Fundraising by choosing **Click Here To Select**. This will open a calendar that allows a date to be selected. A Fundraising record can be submitted for one specific day.



[+] Show Instructions

January		February	2016		March	
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29					

Clear Selection

► To go to a **previous or upcoming month**, click on the name of the month to see those dates. Once a date is selected, the calendar will automatically close.

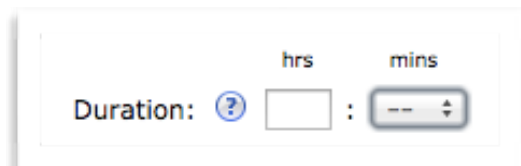
► To change the selected date, click **Clear Selection** at the bottom left corner of the Fundraising calendar.

► List the type of Fundraising **Event** that took place. All **Events must relate to assisting the residents to age in place**. Manually type the Event description into the Event box.



*Event: ?

► Adding the **Duration** of this event is optional, however, the time entered here will feed automatically into the brown Service Hours reference chart for the date range selected, and will also serve as a guide as to where this value should be entered on the Create Service Hours Form in order to populate your HUD report. Use the drop down menu to choose the desired amount of minutes. Type in the number of hours manually.



Duration: ? hrs : mins

*Details (2,000 char. max) ?



► For the **Details** section, enter a brief description of the Fundraising efforts. This is a required field. Use this box to provide details of the Fundraising. Details should include a list of the types of activities performed, the amount of funds raised, and the intended use of the funds.

Editing or Deleting Fundraising

A Fundraising record can be edited or deleted by clicking on the **Edit / Delete** link on the **Fundraising** block of the **SC Daily Log**.

Edit Fundraising

*Required Fields

*Service Coordinator: Trainer, Misty ⇅

Fundraising: Select Fundraising Record ⇅

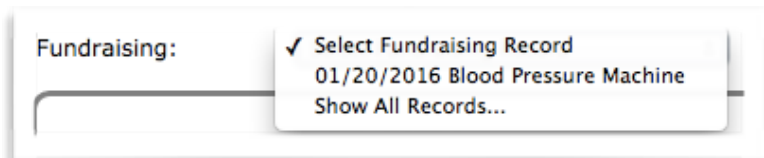
No record selected

Update

Delete

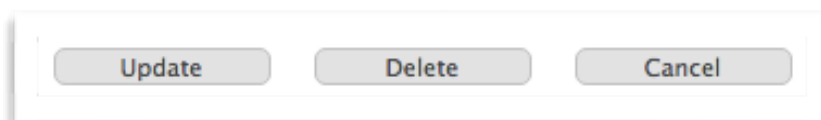
Cancel

► Initially, there are no records selected. To find a particular record to edit or delete, choose **Select Fundraising Record**, and a drop down menu will appear with options.

A screenshot of a web interface showing a dropdown menu. The label "Fundraising:" is on the left. The dropdown menu is open, showing three options: "✓ Select Fundraising Record", "01/20/2016 Blood Pressure Machine", and "Show All Records...".

Fundraising:	✓ Select Fundraising Record
	01/20/2016 Blood Pressure Machine
	Show All Records...

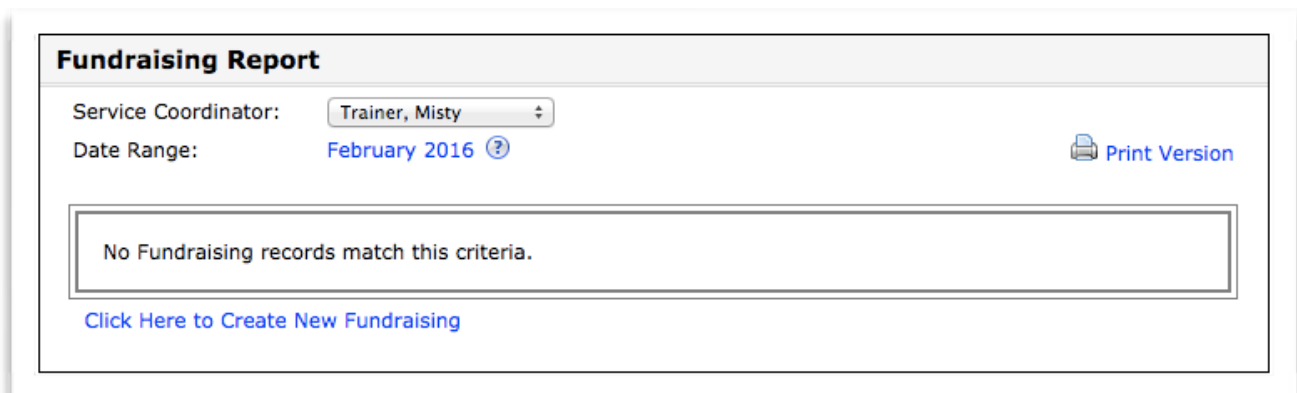
► Select a Fundraising record to edit, and it will open automatically. Once the changes are complete, go to the bottom of the edit Fundraising page and click **Update** to save edits to this record. Or, to delete this record, simply click on **Delete**. To exit out of the record without make any changes click **Cancel**.


A screenshot of a web interface showing three buttons: "Update", "Delete", and "Cancel".

Update	Delete	Cancel
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Print Report of Fundraising

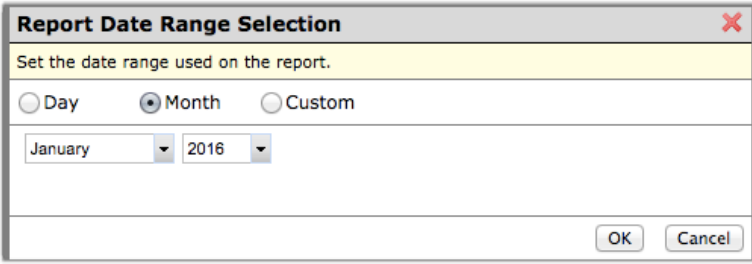
A **Fundraising Report** can be accessed from the **SC Daily Log**. Fundraising reports can be run for a day, month, or custom range. A report can be saved as a PDF and printed.

A screenshot of a web interface titled "Fundraising Report". It has two input fields: "Service Coordinator:" with a dropdown menu showing "Trainer, Misty" and "Date Range:" with a text input showing "February 2016" and a help icon. To the right is a "Print Version" link with a printer icon. Below these is a large empty box containing the text "No Fundraising records match this criteria." At the bottom is a link "Click Here to Create New Fundraising".

Fundraising Report	
Service Coordinator:	Trainer, Misty
Date Range:	February 2016 ?
 Print Version	
No Fundraising records match this criteria.	
Click Here to Create New Fundraising	

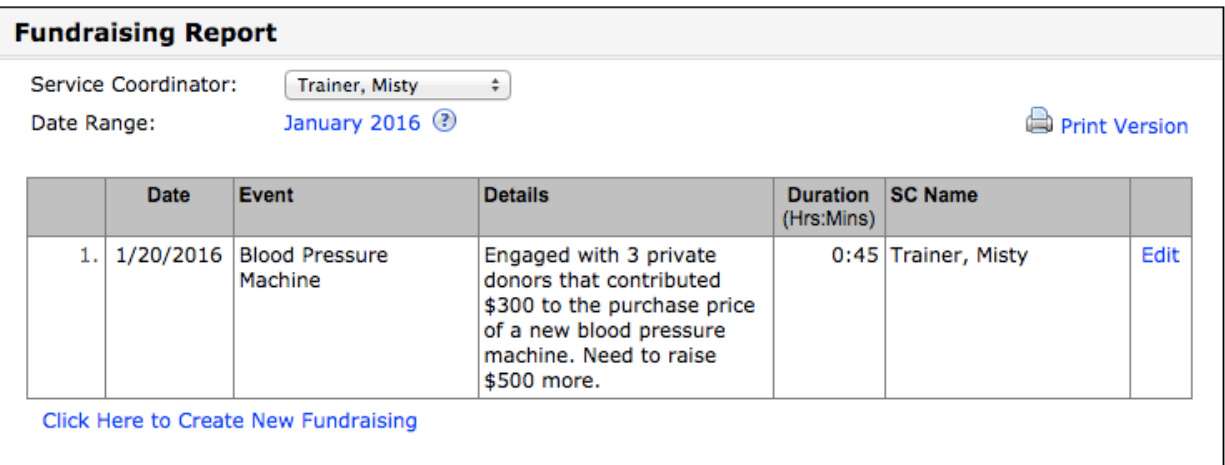
► Initially, the **Date Range** of the report will default to the current month. To view a different date or range, click the blue link displaying the current month.

► A **Report Date Range Selection** tool will open. A report can be run for a specific day, month, or custom date range. Once the range has been specified, click **OK** and it will bring up all the Fundraising records for the desired date range. To exit out of the calendar without making any changes or choosing a date range, click **Cancel**.



The dialog box is titled "Report Date Range Selection" and has a close button (X) in the top right corner. Below the title bar is a yellow instruction bar that says "Set the date range used on the report." There are three radio buttons: "Day", "Month" (which is selected), and "Custom". Below these are two dropdown menus: the first is set to "January" and the second is set to "2016". At the bottom right are "OK" and "Cancel" buttons.

The body of the report page will list each Fundraising record that was entered during the date range. Each record is broken down by **Date**, **Event**, **Details**, **Duration**, and **Service Coordinator**. Existing records can be edited directly from the report screen and new records can also be added on the report screen.



The "Fundraising Report" screen has a header with the title "Fundraising Report". Below the header, there is a "Service Coordinator:" label followed by a dropdown menu showing "Trainer, Misty". To the right of this is a "Date Range:" label followed by "January 2016" and a help icon (?). Further right is a "Print Version" link with a printer icon. Below this information is a table with the following columns: "Date", "Event", "Details", "Duration (Hrs:Mins)", "SC Name", and an empty column for links. The table contains one row of data. Below the table is a link that says "Click Here to Create New Fundraising".

	Date	Event	Details	Duration (Hrs:Mins)	SC Name	
1.	1/20/2016	Blood Pressure Machine	Engaged with 3 private donors that contributed \$300 to the purchase price of a new blood pressure machine. Need to raise \$500 more.	0:45	Trainer, Misty	Edit

► **Edit** a record directly from the Fundraising Report page by clicking on the blue edit link to the right of each particular record. This feature will open the record. Once the desired changes are made and saved, the record will close and this particular Fundraising Report screen will be visible once again.

► To add an additional Fundraising record directly from this report screen, choose **Click Here to Create New Fundraising** and a Create Fundraising form will open. Once the new record is created, it will close and this particular Fundraising Report screen will be visible once again.

► To print a version of this report, click **Print Version** at the top right portion of the Fundraising report screen. This will download a PDF version of the report which can then be opened and printed.