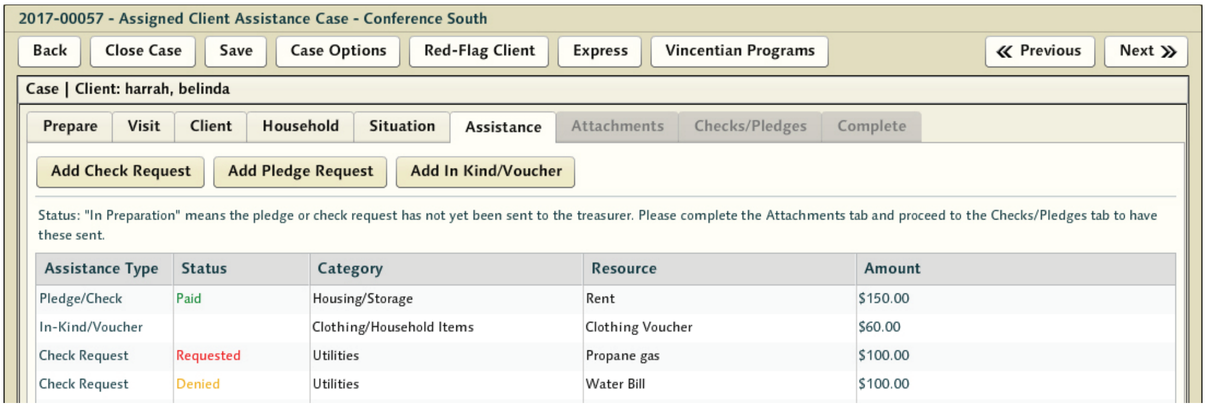
Assistance Tab

The assistance tab is where caseworkers generate the actual assistance requests for the treasurers. When initially reaching this tab the request grid will be empty, and as items are added using one of 3 different buttons they'll appear in the grid - differentiated by the type of assistance to be provided.



Assistance Type	Status	Category	Resource	Amount
Pledge/Check	Paid	Housing/Storage	Rent	$150.00
In-Kind/Voucher		Clothing/Household Items	Clothing Voucher	$60.00
Check Request	Requested	Utilities	Propane gas	$100.00
Check Request	Denied	Utilities	Water Bill	$100.00

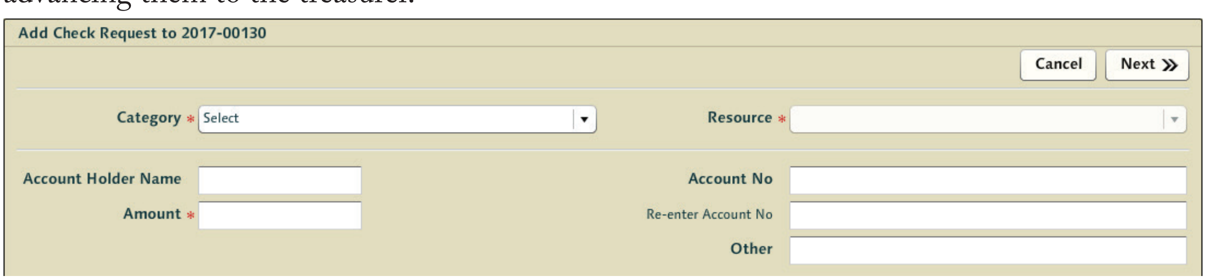
[Add Check Request] is used to prepare all the details required for a treasurer to issue a check to assist the client with Direct Assistance - such as Utilities.
[Add Pledge Request] is used to record a pledge.
[Add In Kind/Voucher] allows for the capturing of assistance that is not directly related to the conference treasury - such as food or spiritual assistance.

The grid here shows the type of assistance, the status, the category and resource type, and the amount. Status is also presented to alert you to whether the request has been advanced.

Note: There are a number of reasons CMS breaks direct aid assistance down into constituent collections. Many conferences have eligibility rules based on the type of assistance provided. Others may have special funding that's been secured for a certain type of aid, or be able to use these details in the pursuit of grants. Resources are a subset of Categories - and the list in the system has been assembled through a combination of user feedback and reporting requirement. It will change over time to reflect any additional needs of the users. For greater detail on the transaction types and their relationships to resource categories in the system, see Transaction Types found within the treasury section below.

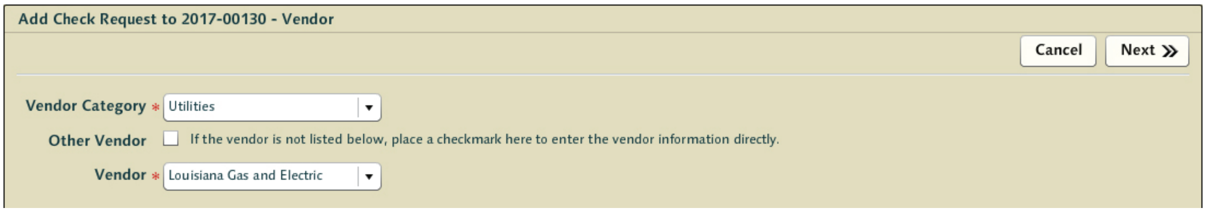
Adding a Check Request

Pressing [Add Check Request] starts a 3 screen wizard with a very simple set of options that guides the caseworker through the process of adding a check request item. Generally caseworkers will record all check requests related to a case before clicking [Next] and advancing them to the treasurer.



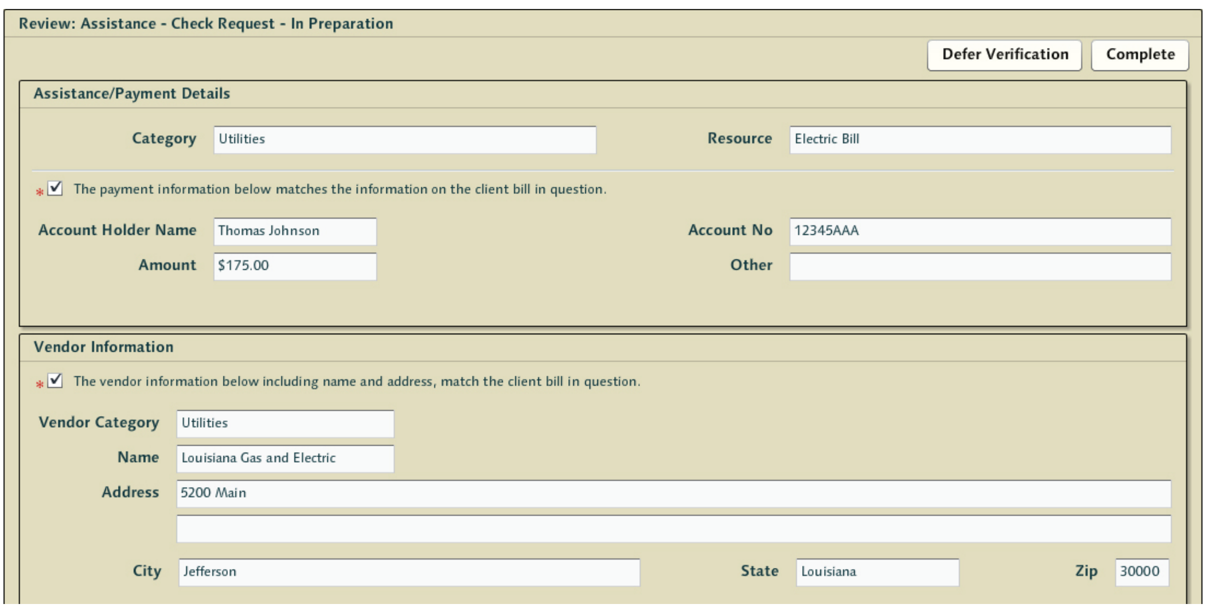
The first screen collects category and resource information: the amount, and any pertinent account information from the client. It also has an 'other' field which can be used to record debit transaction IDs or other notes that need to be passed to the treasurer related to this request.

The second screen presents vendor selection based on the resource category information selected in the first. Here the caseworker provides vendor information either mapping to a vendor that's in the system or capturing the details of who the check will be made out to for the treasurer's records.



Approved vendors that appear in the vendor drop down are entered into the system as a diocese level configuration. Selecting commonly used vendors from a list saves time and reduces the possibility of errors. However, the system allows for unique vendor scenarios. If the vendor is not in the dropdown list - the caseworker should select the 'other' checkbox, allowing them to detail specific information unique to this check request. If a check is being requested, clicking [Next] will take the caseworker to the Vendor Verification screen.

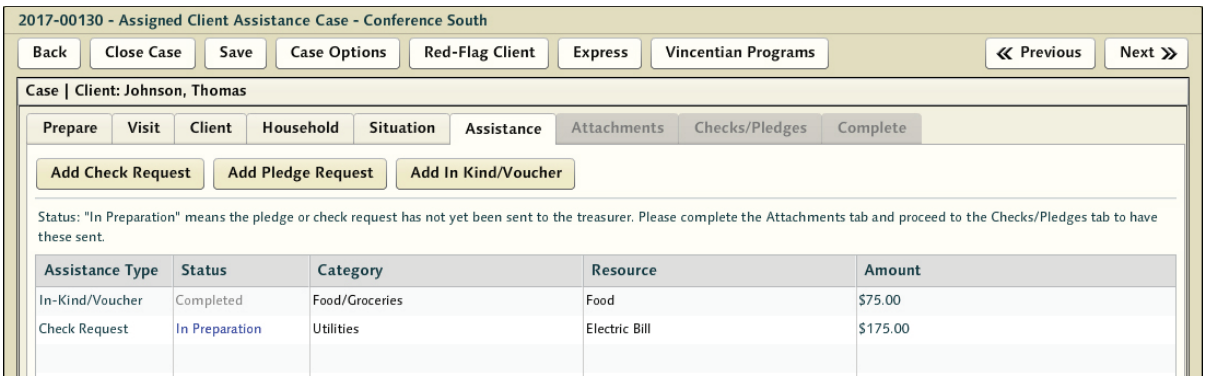
The third screen presents all the information and forces the caseworker to review the details associated with the vendor and the client. They should verify that the billing and account information is accurately recorded - whether that involves the process of examining a physical bill or simply double checking their previous work.



The details have been broken into blocks to make them easier to read - and the required checkboxes asserting that the data is correct have been placed at the top of each section. The [Defer Verification] button at the top allows the caseworker to pause the check request in an unfinished/unverified state - letting them come back to it later when they are sure they have all the details necessary to advance the request to the conference treasurer.

Note: the field 'Other' is used to add additional information related to the payment that doesn't fit elsewhere. It was important to provide caseworkers the ability to place a note with an assistance request - as often they need to record things like service cutoff dates or account information that is difficult to categorize and unique to the request.

Pressing [Complete] will finish the request preparation and return the caseworker to the Assistance tab where the new request will have been added as a line item in the grid displaying requests with the Status of 'In Preparation'. It is common for several items to be present in this grid as it is common for caseworkers to provide non-financial assistance to those they visit regardless of the request.

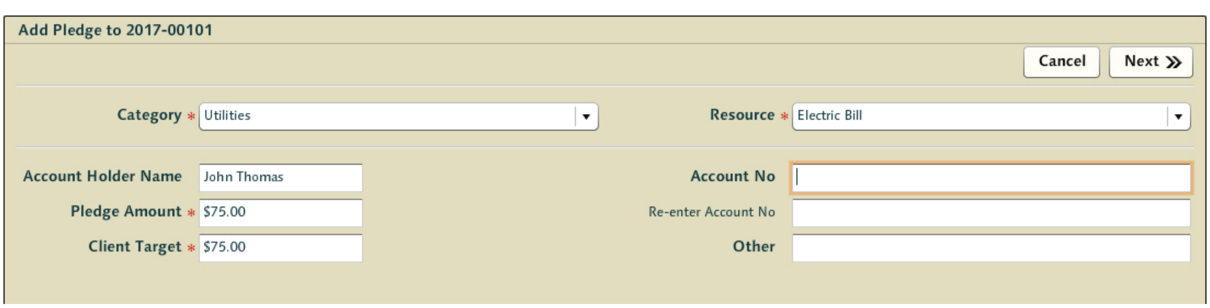


When all the assistance requests have been entered by the caseworker, they will click [Next]. Only when leaving this tab and moving to the checks tab are the requests sent in bulk to the conference treasurer. If there are multiple check requests they will appear individually in the treasurer's work queue.

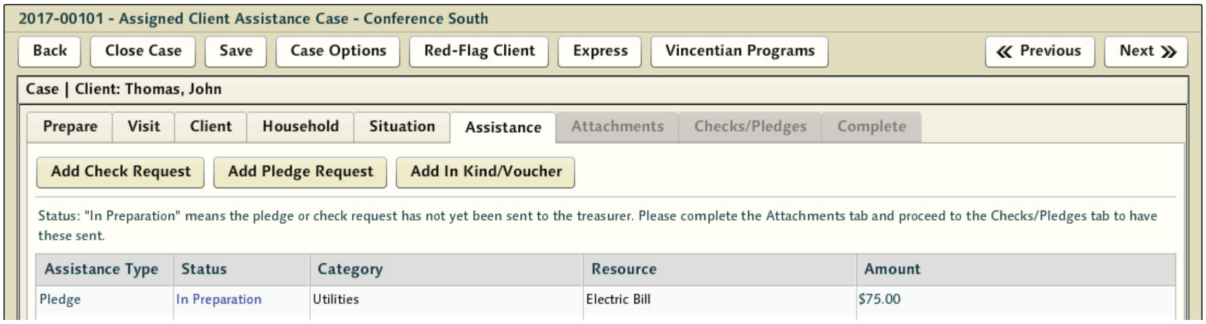
Adding a Pledge Request

Pledges are like check requests - except that they do not actually relate to a check at all. They're a commitment on the part of your conference to come through with some amount of money if the individual seeking assistance will fund some portion of their outstanding debt. These sorts of promises still need to get to the treasurer to make the treasurer aware of this encumbered liability the conference will have going forward as a result of the promise to match funds.

There are a number of additional states to a pledge request process - and a number of additional scenarios that can potentially add complexity to the process. However, in a typical operation, it's very intuitive and simple.

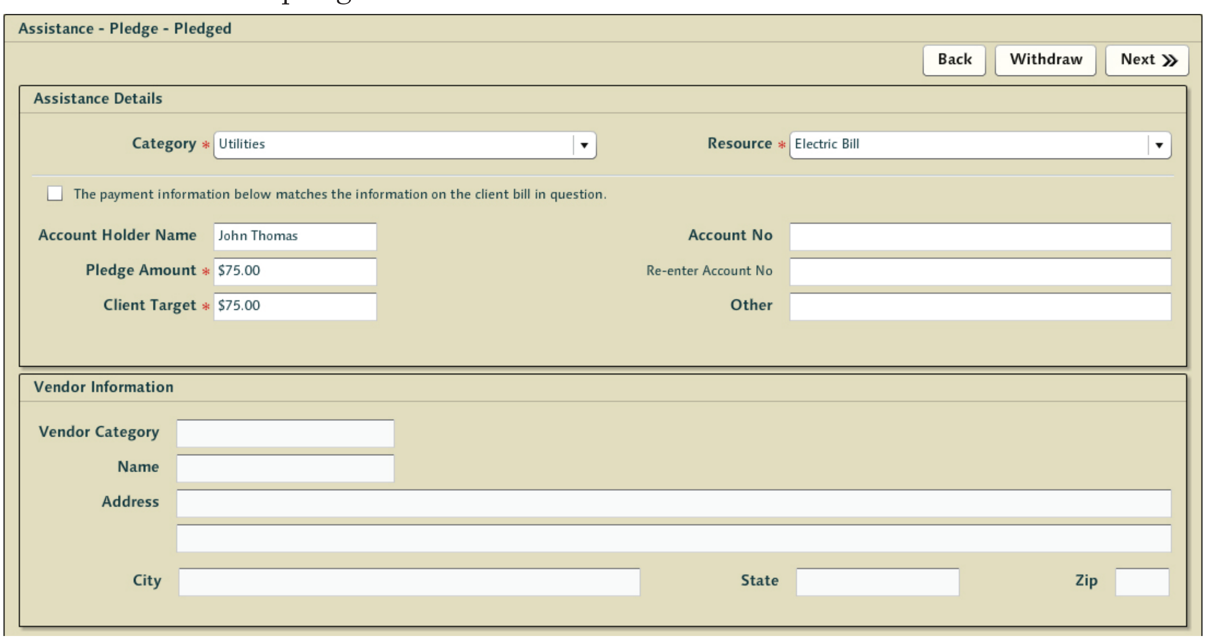


Making an initial pledge request requires less information. Neither the vendor information nor the account information is necessarily required at this point. These must be collected at some point prior to things advancing to a check request but initially caseworkers are not required to provide the information.



This initial state is 'In Preparation'. As it moves forward it will become 'Requested' and finally, once the pledge has been approved by the treasurer, it will appear in the Checks/Pledges tab for the case in question as "Pledged".

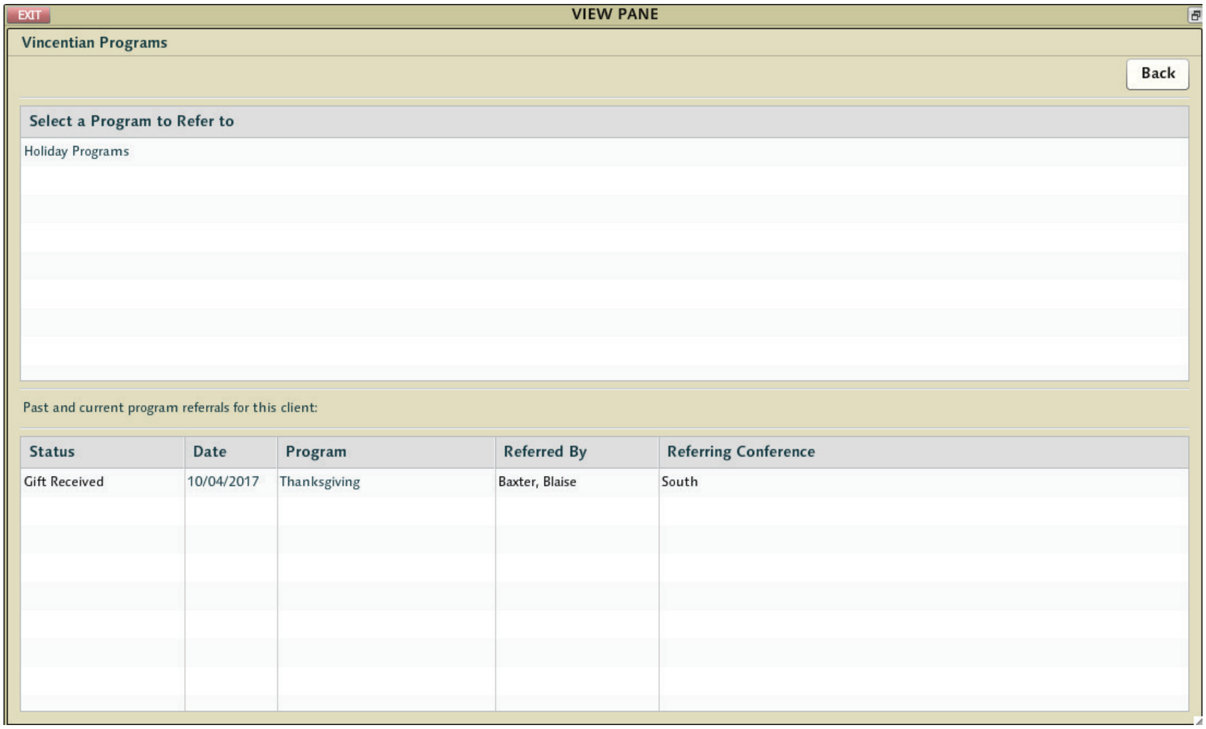
At a point in the future once the requester has been in contact with the caseworker and come through with the money they've been asked to stake to receive conference matching funds, caseworkers will then select this pledge from the grid. This allows them to revisit the pledge's details and make sure everything that needs to be there for a check request is present as it walks through a review of both the Assistance Details and the Vendor Information. Caseworkers can also withdraw the pledge from here if it turns out the client is unable to meet their end of the pledge.



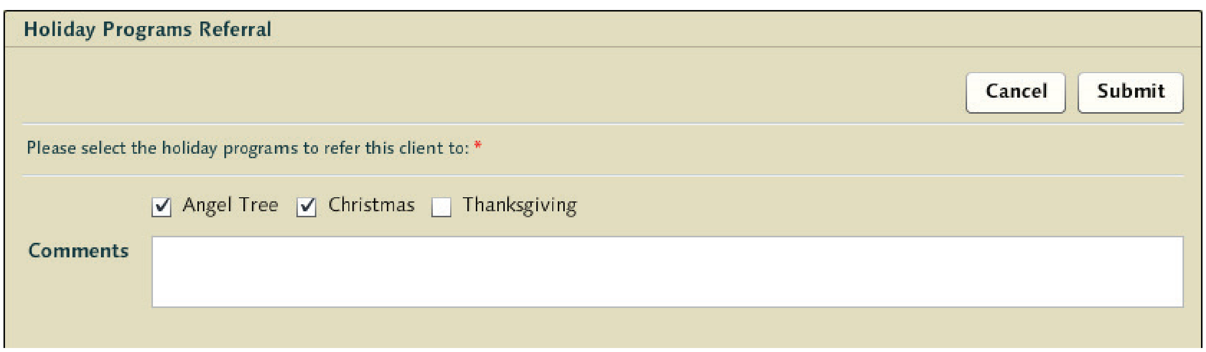
Once the caseworker has fully supplied all the data that would be required for the issuing of a check, the pledge is ready to be Executed by pressing the [Execute] button at the top of this screen. This action will submit the request to the treasurer, asserting that the client has satisfied their required portion of the assistance request - at which point it will show up for the treasurer as a check request (noting that it came from a pledge).

Vincentian Programs

Caseworkers may also refer the household to any of the Holiday Programs by clicking the [Vincentian Programs] button found on this tab. This is the first of potentially many special works programs that may be available to various conferences within your diocese.



Caseworkers simply review the program assistance history - verifying that the household is not already on a list or is eligible for holiday assistance from your conference - and selects Holiday Programs from the Program List grid.



At this point the caseworker simply selects which programs they wish to refer the household to and clicks submit.

Note: Program Support is a major component of this 3.0.000 release. Appendix C near the end of this guide has detailed documentation on the nature of this functionality and how it will be used in the future - as well as details for treasurers on how they can work with the Holiday Program functionality seen here.