



# **CMS Vendor Management & Reporting**

November 2021

# 2021-2022 Advanced Training Topics



## Completed (Videos & Handouts)

- ✓ Holiday Programs
- ✓ Client Merge
- ✓ Annual Report
- ✓ Beginners Case Intake
- ✓ Pledges
- ✓ Beginners Treasurer
- ✓ Vendor Maintenance & Conf. Reports

## Planned

- Gift Cards & Vouchers
- Client History & Uploading Documents
- Express Assistance
- Red Flag
- CMS Support Community Website

# Vendor Management Evolution



## Global (All Conferences)

- Housing
- Utilities

## Conference Level

- Housing-Conference

## Conference Level Expanded

- Housing-Conference
- Utilities
- Clothing/Household
- Phone/Internet
- Transportation
- Other-Not Listed

# Vendor Management



- ✓ Initially populated from the “global” vendor list
- ✓ Treasurer:
  - Creates and maintains conference vendors
  - “Adds or dismisses” new vendors entered by CW
  - Notified when new vendor is created by CW
- ✓ Caseworkers:
  - Can enter new vendors
  - Select conference vendors from “drop down” list

# Conference Reports



- Assistance by Case
- Assistance Reports
- Assistance Summary/Demographics
- Case Distribution
- Clients
- Membership Roster
- Demographic Assistance (Financial)
- Demographic Assistance (Non-Financial)
- Financial Situation
- Transactions by Type
- Underlying Causes

## Reports Usages (Examples)

- ✓ Grant Writing
- ✓ Trends
- ✓ Food Bank Reporting
- ✓ Case Management
- ✓ Caseworker Case Load Analysis
- ✓ Homeless Assisted
- ✓ Red Flagged & Parishioners Clients
- ✓ Vendor Payments Analysis
- ✓ Financial & Non-Financial Analysis
- ✓ Client Communication

