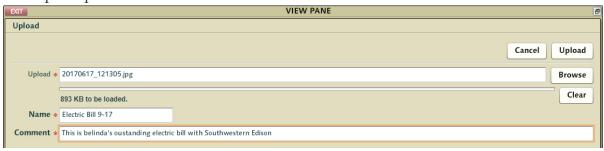# Attachments Tab

The Attachments tab is an optional tab that allows conferences to take images and attach them to the case in question. Conferences who enable the option in the conference configuration will add an Attachment tab to the workflow that falls between the Assistance tab and the Checks/Pledges tab.

The intention of this function is to allow caseworkers to attach an image of an electric bill or some such to prove the assistance need to both the treasurer and to any auditors who might spot-check casework to guarantee Vincentian funds are being spent appropriately.

To attach a file simply press the [Upload] button found on the Attachments tab - then browse to the file you want to upload from your local desktop. IF you use a phone or digital camera to capture the image, you'll need to get that image off that device and onto your desktop computer.

CMS significantly decreases the quality of the images you post before they are attached to the casework - converting them to black and white low resolution images. There's no need or advantage to taking nor uploading large high quality images.

These images are also ONLY available to caseworkers so long as the case remains open. Once closed, these attachments are flagged for removal and are not visible except to individuals in leadership positions (who may see them for the purpose of audit). Even then, they will only be kept a limited period of time on the system - after which time they are purged.

There are many state laws which require charities such as St Vincent de Paul to maintain copies of bills for which they render financial assistance - some with mandates as long as 7 years. Conferences should check with their Diocesan Council as to how they wish to manage this process. However, a diocese must carefully balance the needs of an audit against the dangers of leaving imaged documents on the internet (even if they are only accessible by leadership). We strongly recommend spot-check auditing or local collection of these elements rather than extending the lifespan of these attached files beyond the default 60 days. We also strongly recommend strict oversight over cases left open for inordinate periods of time in conferences within diocese where scanned documents are enabled.

The settings for how long these files remain available are found in the diocese configuration by the Diocese Administrator role.

Checks/Pledges Tab

The Checks/Pledges tab allows the caseworker a single screen where they can review the status of all checks and pledges related to the case. In some complex cases several checks could be involved and be in varying states. Cases could be open for extended periods and this screen could have a fairly long set of payments related to a longer list of assistance requests than typical.
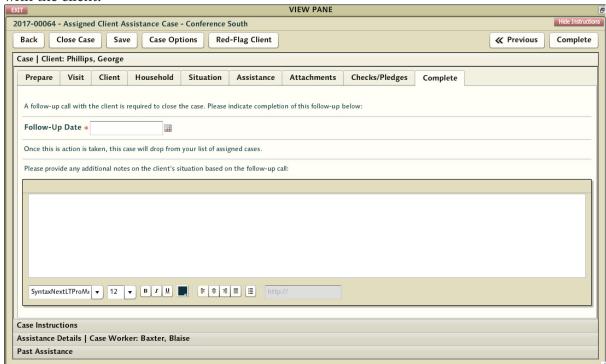

Each of these elements will have alerted the treasurer that they are pending review. When the treasurer acts upon them, the caseworker will be notified in turn. As the check requests are approved or denied the caseworker can determine when a good time to contact the client and let them know what decisions have been made and what bills have been paid by the organization.

Unlike checks, pledges require further action once they've been approved. Initially pledges that have been sent to a treasurer using the for review will return as 'Pledged'. When the caseworker wishes to transform the pledge into a check request due to the client satisfying their end of the pledge - they will press the [Execute] button on the pledge. Once they've been 'Executed' by the caseworker - they will appear in the grid as 'Requested' again - but the Assistance type will change from Pledge to Pledge/Check to denote that this is now a pledge which has been adjudged by the caseworker as ready to be processed.

Followup Tab

It is very important to follow up with the client to be sure any assistance came through as promised - and take the opportunity to review the continuity of care dynamic. Often a single assistance event does not properly address the long term needs of the client - and the follow up is an opportunity to continue to assess the situation and perhaps look to ways to extend additional efforts if appropriate. To that end, the case is not closed immediately upon the treasurer cutting the check - instead the case is only closed once there has been a followup with the client.

Details captured during the followup conversation can be recorded - and any additional information deemed valuable with regards to the client and the case can be captured here with an eye to future dealings with this individual.

Once complete - the Caseworker closes the case by pressing [Complete] - which will record the case as 'Closed - Assistance Provided' or 'Closed - No Assistance Provided' depending on which of those two is accurate.

Note: The case cannot be closed so long as there are pending (unpaid yet not denied) check requests. If the caseworker attempts to do so they will be prompted to withdraw the check requests and try again.