

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.

The screenshot shows a 'VIEW PANE' window with an 'Upload' section. It includes a file name input field containing '20170617_121305.jpg', a 'Browse' button, and a progress indicator showing '893 KB to be loaded.'. Below this is a 'Name' field with 'Electric Bill 9-17' and a 'Comment' field with the text 'This is belinda's outstanding electric bill with Southwestern Edison'. At the top right of the upload area are 'Cancel' and 'Upload' buttons.

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/attachments will be available for the caseworker to access them for 7 years from the case close date.

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 7 years. 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.