

St. Catherine of Siena Conference of Society of St. Vincent de Paul Case Workers. Guideline for Client Call

- Visits are always made in teams of at least two case workers.
- When calling a Client, always ensure you Use *67 on your telephone to disable Caller ID so they will not be calling you later for more help; all calls for assistance must come through the help line, not to individual case workers. *67 works on cell phones as well.
- For Home Visits: Primary Case Worker call clients ahead of time to ensure they will be home when they come and that we will need to see the bills they want help with, and if rent, their lease agreement.
- For Thrift Store Visits: Primary Case Worker call clients one day ahead of time to remind them of their appointment time and what they need to bring to the interview (current bills & if rent assistance requested, rental or lease agreement).
- When you call to arrange your meeting with the client, tell them you will need to see a valid Photo ID. To avoid potential fraud, if your client does not have a valid Photo ID, we can't help them, so please make that the first business item on your call.
- Primary Case Worker verifies the client ID, conducts the interview, fills out the case record and confers with the Assistant Case Worker to agree on what assistance they should give.
- Once the amount and type of assistance are agreed on and communicated to the client, the Primary Case Worker records all of the account, address and amount information needed to mail check(s) for financial assistance, and asks the client to sign the case record.
If bill must be paid today:
 1. Hotel: contact the Conference Treasurer or his backup to request hand delivery.
 2. Rent: call Landlord and you tell him we will mail out no later than tomorrow.
 3. Utility: fax a commitment letter with the amount that will be mailed no later than tomorrow.
- The Primary also has available: grocery gift cards for food (when available), a listing of area food pantries and Thrift Store vouchers the family can use to get clothing from our Thrift Store in Kennesaw.
- The Assistant Case Worker listens to the interview, noting client name and situation information to include later in the concluding prayer for God's help. He/she offers encouragement where appropriate. While the Primary Case Worker records all the payment information on the case record, when appropriate, the Assistant can engage the client with helpful questions and information. Information for the client can include how to use the Thrift Store Voucher, and possible employment opportunities in the area.
- At the conclusion of the call, the Assistant Case Worker asks the client to join us in prayer, usually a prayer personalized to the client asking Lord Jesus to help the client's family overcome their current situation and get back on their feet.
- The Primary Case Worker is responsible for timely entry into CMS of (1) interview & case record information and (2) Check Requests for the bills the team agreed to pay.
- The Conference Treasurer writes and mails the Requested Checks.