

SCREENER GUIDELINES

972 423 1877

1. Assistance/General Mailbox :

Dial 972 423 1877, Press 3

During Message Press: *; you will be prompted to enter password.

Enter Password: 2092

Press 1: to Review messages

Press 3: to Delete a message as soon as you have recorded message to enter into CMS.

Hang up when finished

2. Screening and Intake

This role is to return all calls recorded on the line, screen to determine if they are in our area, gather key information and enter it into CMS, our online database. If they are not in our area, we assist them with referral information.

Recommendation: Block your phone line using *67 before you call back the requestor. This avoids exposing your personal phone line.

Recommendation: Obtain client name, address, zip code, apartment # and telephone number before discussing their request or questions. Ask about name spelling.

If you are uncertain about phone number press 8 during the call and then 2 to hear the number after date and time stamp

Our service boundaries are:

North: Parker Road East: Murphy Rd.

South: Campbell Rd West: Coit Rd

Zip codes 75074 and 75075 This also includes parts of Richardson (75080 and 75082); and Murphy (75094). we cover all of zipcode 75074 regardless of SVDP map

If the caller is a parishioner, we will help them no matter what zip code they live in if we can.

If the caller is outside our boundaries, provide them w the phone number of the Catholic Church in their area. Use the SVDP Zip Code file to find the nearest Conference for the caller. Close these cases with the 'Disposition' code of 'Referral'.

There are two zipcode files in Phone log/SVDP Documents/ Resources tabs or this website <http://www.svdpdallas.info>

If you want to delete a case you have entered twice

mark your name as advocate go to MY CASES and delete following directions at top of pg.

When you log on to CMS there are 6 choices, in the white box to the right of Neighbors :

Enter the last four numbers of their phone number to check for previous cases. Use the earliest Client ID # . Use the COPY icon from the latest case. **Cross check 3 items** phone,name address.

To open a new case click NEW CASE TAB at top right to start

Main Questions to ask when you speak to a client:

1. What is your zip codes? 75074 and 75075; 75080,75082,75094 (ours)
2. What is the correct spelling of name, address, **include apartment #**, phone number
3. What are your needs ? **Needs** box you can now submit numerous types; Rent, Mini-loan, voucher.

Keep in mind we don't normally assist with mortgage, phone, car payments, insurance or medical bills. Ultimately it is up to the group, but try to be the filter so that the case advocate has a client that we can help and all of the right information.

4. What is requested? Financial -- Our average case is \$250-\$300 let them know . Call back when they have a need closer to our limits.

What is the amount needed, the due date and **amount they have toward it ?**

5. Who have they asked? their church ? their family? CCAC?

TXU and Atmos req. go to CCAC

6. Has SVDP assisted you in the past?

If so --Who was your case advocate ? check the CMS workbook to see their history

7. Do you have relatives in area ?

8. What is the number of people living in the home.? Ages?

Call Veronica at StM office to check if a parishioner

If they have a case open.

Enter newest data at the top start with date , end with 3 initials –
(8/31 req. help with late fees -\$350-- DDF)

If their case has been closed

Use the Copy icon to start a new case .

A. –Type **HISTORY** at the top of **both screener and advocate note sections** with the old date,then insert your notes above that line.

B, --Change the date to today.

C --You need to delete all the information on the right from **Need** to the bottom.

D. –Mark as open PUT IN ADVOCATE FROM LAST CASE

SEND HOMELESS CASES TO RICH
 SEND UTILITY CASES TO TIM
 SEND ALL OTHER CASES TO JIM GEISER
 SEND REPEATS TO OLD ADVOCATE if still active
 SEND MIN-LOAN REQUESTS AND HISPANIC CASES TO OSCAR GARCIA
 SEND FOOD REQUESTS TO JOE REGECI

see Roster if you want to email information not in a case.

At Risk - Call 911 or CPS or APS? Texas Abuse Hotline (1-800-252-5400)

New Client: **Explain process** that you will pass on the information to the case advocate team and they will give them a call to set up an appointment to meet them in their home. There have been situations where people are denied assistance because they don't want us in their homes. Refer new cases to Jim as the advocate via CMS. Tell them someone will be in touch with them in the next 24 to 48 hours. I say my first name again and let them know they can reach me (or another advocate) by calling the SVdP number if they have any questions throughout the process

Save and then click the box to Email Selected Advocate.

CHECK YOU'RE MY CASES FILE AND NEIGHBORS FILE TO SEE IF YOU CAN COMPLETE AND CLOSE ANY CASES

NEIGHBORS tab look for your name under advocate in the NULL records (first entry) write down the client id #.s Open the phone log tab and type each id # in the search box . Open that case type the CLIENT id# in the client id and save/

MYCASES tab to see that all of the open cases have been passed to an advocate your cases should be yellow (Forward-Client) or red (Closed).

Review your Forward Client cases after 1 months and close those still there (Date -Closed NFC- initials) no further contact

Jim Geiser . He will handle the twinning interfaces.

If the caller wants to donate some item, mark Disposition as 'Donation'

Give them SVdP # 214-373-7837 3305 Ctrl Expressway North of Parker Rd.

If the caller is requesting food, please mark disposition as 'pantry' and send the information to Joe R as the advocate.

MyRide Dallas

<http://www.myridedallas.org>

Dallas Mobility

<http://www.dallasmobility.org>

We were informed of a transportation option for needy and disabled individuals called MyRide Dallas. After looking into this option for Collin County we have seen that this specific service is available only in Dallas County but this organization has ties to the larger Dallas Mobility organization which does indeed service Collin County as well. Here is the information on these organizations:

Handy phones numbers:

St. Jude handles Lucas. 469 951 6526.

St. Elizabeth Ann Seton: 972-648-7207 75023 (North of Parker Road).

Our Lady of Angels: 469-467 9669: North of Legacy on west side/ South Allen

Prince of Peace: 972 380 2100: 75024, 75093, 75252, and 75287 Ask for Mary Catherine

St.Gabriels 214-592-0645 McKinney

St Michael's SVDP (helps with food, only) handles McKinney residents in the 69 zip code. St.

Gabriel's (helps with finan. assistance) handles the McKinney residents- 69,70 & 71 zip codes

Collin County Assistance Center: 972 422 1850 PISD boundaries

MDHA -Metro Dallas Homeless -1 888-411-6802

MEDICAL Douglas Community Center 801 East Plano Pkwy Uninsured only// 5 days/ wk \$10 copay

The CCAC takes request for all non TXU utility request as well as rent at 9:00 AM on Thursday. I have been told that if you leave your name on the line you will be called back in order. You have to be there to receive the call back or you fall out of line. TXU or ATMOS requests can be done any day of the week. They help once during the calendar year.

Salvation Army 972 423 8524 PISD boundaries Salvation Army does not help with financial assistance. They assist with food and clothing.

Be careful not to even appear to commit a level of funding for the client as the client advocate will address the matter as well as explain the process. In addition, **the advocate will determine whether the matter can be handled at our normal weekly meeting on Tuesday or requires it to be handled as an emergency situation** (In-hand Shutoff or Eviction Notices). A home visit is usually required before meaningful funds are disbursed

This line should be checked several times daily, as there are urgent situations that are time critical.

Address all CMS file questions to Rich Holmer at 214 450 7183

Tim carries a cell that says Ken cel 214-334-2874 -- put in your saved #s

If it is not time critical email rather than call.

Calls requesting food and financial assistance

You need to **email advocates twice.**

Make Joe the advocate , save , click the with selected box and email him.

Then go back make Jim the advocate, save, click the Email selected box and email Jim. This notifies Joe but doesn't leave a case open in his name. If it is only food you can close the case after you have emailed Joe.

The process for the “**Emergency Loan**” pilot is very similar to the one currently in place for MLP loans that rescue families from existing predatory loans. Loan amounts will be the same as they are for predatory loan conversion. For the “emergency loan”, proof of the emergency need is required. Each loan application will be reviewed for approval by the appropriate district rep **Oscar** “Emergency Loans” will only be available for certain specific uses during the pilot: **\$2500 maximum**

- **Automobile repairs. Major home appliances. Urgent home repairs.**
- **New apartment deposits. Medical bills. Family funerals, etc.**
- **Additional use requests will be considered on a case-by-case basis.**
- A retroactive loan will be considered for a qualifying emergency expense paid within the past 30 days. In such case, the loan money will not be given directly to the applicant, but will be used for some of their monthly bills (rent, mortgage, utilities, etc.). A receipt for the expense no older than 30 days must be submitted.

“Emergency Loans” will **NOT** be available for the following:

- Recurring expenses, such as rent or utility bills. School/College Tuition. Credit Card Debt.
- Travel Expenses.

Screeners ; Debi Ferguson, Jim Geiser, Jim Wells, Mary Hudson, Joanne Levinski, Tim Meyer. Please be sure to put your initials at the end of your entries so advocates can contact you with questions.

Jennifer Lajoie Youth resource out reach center City House

Sr. Program Director, www.cityhouse.org

C: 469-261-7907

830 Central Pkwy E. Suite 350 Plano, TX 75074

As you probably know, SVdP has been referring our friends without health insurance to the Douglass Community Clinic at 801 E. Plano Pkwy., Room 140, (469) 800-6230. They’re open daily with a doctor on-site, and once patients are registered and qualify (income based only), they can make appointments for general healthcare needs. We’ve also agreed to pay the \$10 co-pay assessed for a visit. We’re working with the clinic on a procedure to verify the person receiving assistance is someone we directed to them. Towards that end, if you send any friends to the clinic please give them an identifier as follows:

(Two-digit Year)(Advocate Initials)(Client ID from CMS) e.g. 18RH10065

The clinic will bill us for any visits from individuals using an ID of this type, which we can match to our case files. For HIPPA reasons the clinic cannot just send us a list of names of people treated. If you’ve already referred anyone who has visited the clinic and can remember their names, please send me this info and I’ll check with the clinic to ensure the process is working as intended.

Please let me know if you have any questions.

Thanks, Rich

214-450-7183

Food Pantries

1. ***Plano Food Pantry***

Must call Assistance Center. Carries perishables. Phone: 972-422-1850
2200 E 18th St. Plano, TX M - F 8:30am – 4:30pm

2. ***God's Food Pantry***

3420 E 14th Street Suite 101 Plano, TX Phone: 972-633-9777

3. ***Minnie's Food Pantry***

3033 W Parker Road Suite 3124 Plano, TX Phone: 972-596-0253
Wed-Sat 9am - 11am

4. ***Seven Loaves Food Pantry***

5801 W Plano Parkway Plano, TX Phone: 469-385-1813
Th 4pm - 6:30pm Sa 9am - 11:30am

5. ***St. Vincent de Paul Food Pantry St. Mark Conference***

1100 W 15th St Plano TX Phone: 972-423-1877
Sa 8:45am – 11:45am

6. ***A Christian Food Pantry***

Carry fresh veg. and frozen meat. Clients can go weekly.
1116 Dobie Dr., Plano TX
M-TU-W 10am – 2pm and SA 11am – 3pm Phone: 972-578-5730

7. ***Willow Creek Fellowship***

Services area codes 75075, 75074, and 75023. Need proof of residency, Gov ID, utility bill or Lease. Carries frozen meat. Clients can go weekly.
Tu 11am – 2pm 1804 Av P Plano, TX Phone: 972-423-2950

8. ***His Extended Hands Clothes & Food Pantry***

Shiloh Missionary Baptist Church, Sat 10am – 2pm except for 5th Sat, call first
920 E 14th St Plano TX 75074 Phone: 972-423-6695

