

## How to Convert a Pledge to a Check Request

1. In the CMS Case File for the SVdP Friend, go to the **Checks/Pledges** tab and select the line **Pledged** by left clicking on it.
2. In the Assistance Details page that opens showing the details of the Pledge, review the information for accuracy (the Account Holder Name should be the name of the Friend and the Account No. Should be the apartment number for a rent pledge), make any changes to assure accuracy and then select the small checkbox above the Account Holder Name.

The screenshot shows the 'Assistance - Pledge - Pledged' page in the Venetian Case Management System. The page is titled 'VIEW PANE' and has navigation buttons for 'Back', 'Withdraw', and 'Next >>'. The 'Assistance Details' section includes a 'Category' dropdown set to 'Housing/Storage' and a 'Resource' dropdown set to 'Rent'. Below this, there is a checkbox with the text 'The payment information below matches the information on the client bill in question.' followed by the 'Account Holder Name' field containing 'Eddie Harris'. Other fields include 'Pledge Amount' (\$300.00), 'Client Target' (\$520.00), 'Account No' (Apt. # 347), and 'Re-enter Account No' (Apt. # 347). The 'Vendor Information' section includes a 'Vendor Category' dropdown set to 'Housing', 'Name' (The Plaza on Westheimer), 'Address' (6263 Westheimer Rd), 'Phone', 'Email', 'City' (Houston), 'State' (Texas), and 'Zip' (77057). A red arrow points to the checkbox above the 'Account Holder Name' field.

3. Click **Next>>** in the top right hand corner to proceed to the Vendor Information.
4. Review the Vendor information for accuracy (the Address should be for the leasing office where the check is to be mailed or delivered), make any necessary changes and then select the small checkbox above the Vendor Category.

The screenshot shows the 'Assistance - Pledge/Check - Pledged' page in the Venetian Case Management System. The page is titled 'VIEW PANE' and has navigation buttons for 'Back', 'Withdraw', and 'Done'. The 'Assistance/Payment Details' section includes a 'Category' dropdown set to 'Housing/Storage' and a 'Resource' dropdown set to 'Rent'. Below this, there is a checkbox with the text 'The vendor information below including name and address, match the client bill in question.' followed by the 'Vendor Category' dropdown set to 'Housing'. Other fields include 'Account Holder Name' (Eddie Harris), 'Pledge Amount' (\$300.00), 'Client Target' (\$520.00), 'Account No' (Apt. # 347), and 'Other'. The 'Vendor Information' section includes a checkbox with the text 'If the vendor is not listed below, place a checkmark here to enter the vendor information directly.', 'Name' (The Plaza on Westheimer), 'Address' (6263 Westheimer Rd), 'Phone', 'Email', 'City' (Houston), 'State' (Texas), and 'Zip' (77057). A red arrow points to the checkbox above the 'Vendor Category' field.

- Click **Done** on the top right of the page.
- Click **Execute** on the top right side of the page.

The screenshot shows the 'Assistance - Pledge/Check - Pledged' form in the Vincentian Case Management System. The form includes fields for Category (Housing/Storage), Resource (Rent), Account Holder Name (Eddie Harris), Pledge Amount (\$300.00), Client Target (\$520.00), Vendor Category (Housing), Name (The Plaza on Westheimer), Address (6263 Westheimer Rd), Phone, Email (with a 'Please say that again' error message), City (Houston), State (Texas), and Zip (77057). The 'Execute' button is highlighted with a red arrow.

- After clicking Execute, CMS will return you to the Checks/Pledges tab and the Status will now read **Request Submitted** and the Assistance Type column will now read **Pledge/Check**. This indicates that the Pledge has been converted to a Check Request in the Check Register and is ready for the Treasurer to approve an issue the check.

The screenshot shows the 'Checks/Pledges' tab for Case 2019-00308 - Assigned Client Assistance Case - Conference St. Michael the Archangel - Houston. The table below shows the status of the case.

Status	Date	Assistance Type	Vendor
Request Submitted		Pledge/Check	The Plaza on Westheimer

The 'Request Submitted' status is highlighted with a red arrow.