How to Convert a Pledge to a Check Request

- 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.

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Client Ta	eet + \$520.00						Other	-				
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Vendor Information												
Vendor Category	Housing											
Name	The Plaza on Westheimer											
Address	6263 Westheimer Rd											
Phone		Email										_
City	Houston								State Texas			

- 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 and then select the small checkbox above the Vendor Category.

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Name	The Plaza on Westheimer												
Address	6263 Westheimer Rd												Î
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- 5. Click **Done** on the top right of the page.
- 6. Click **Execute on** the top right side of the page.

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7. 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.

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Back Close Case Save	Case Options Red-Flag Client	« Pre-	evio
Case Client: Harris, Eddie			_
Prepare Visit Client	Household Situation Assistance Attachments Checks/Pledges Complete		_
Status Date	Assistance Type Vendor		
Request Submitted	Pledge/Check The Plaza on Westheimer		
Case Instructions			
Assistance Details Case Work	er: Northrup, Bobby		
Past Assistance			
Client Record Notes			