



**Aguilar Systems  
Vincentian Case Management System  
for St Vincent de Paul**

# Case Intake Training

Archdiocese of Houston –  
Galveston

1. Click **HOME** on the top line of tabs.

2. In the bottom box Main Menu, Options, select **Case Intake**



Vincentian Case Management System

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**TASK PANE** X **VIEW PANE**

Main Menu  
My Conference  
Diocese  
Districts  
Conferences  
▶ Programs  
▶ Dashboards  
▶ Conference Reports  
▶ Abandoned Cases

Messages

Please click on a message to see details.

ID	End Date

**Main Menu** Options

My Assigned Cases  
Case Intake  
Pantry Fulfillment  
Pantry Closeout  
Unassigned Cases for Case Worker  
Check Requests  
Check Register  
Add Volunteer Tasks  
Referred Intake Cases  
Red Flag Audit  
Client Merge  
Pantry Intake  
Pantry Eligibility Report  
Auto Close

3. **Client Profile** appears, click in the **First Name** box and enter the Friends first name.

4. Click on or tab to **Last Name** and enter.

5. Select **Gender** and, if known from the initial telephone contact with the Friend, **Marital Status** and **Ethnicity** from the drop down boxes. If marital status or ethnicity is not known, this information can be provided later by the Case Worker after the home visit.

6. **Date of Birth (DOB)**. While not required, it is very helpful to enter the Friend's date of birth, since this will help us identify the Friend's "Client Record" and case history in the future. It will also help determine if the Friend has previously received assistance.



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VIEW PANE

Client Inquiry

Back Save

Client Profile Client Identification Open Case Review Household Request Details Other Agencies Eligibility Submitted

First Name  MI  Last Name\*  Maiden Name

Gender  Status  DOB  SSN  Up to last five digits

Ethnicity

Spanish Only  Homeless  Veteran  Grade

Other Aid  Child Support  Food Stamps / SNAP  Medicaid  Medicare  Section 8  Social Security  SSI Disability  Unemployment  Veteran  WIC

Phone  Alternate Phone  Work Phone  Email

Address

City  State  Zip  County

7. **Spanish, Homeless and Veteran** boxes- check box only if you know that the answer is Yes.

8. **Other Aid** - if known, check the boxes that are applicable. Otherwise, skip.

9. **Phone** - enter the Friend's telephone number. This is another important identifier for past or future case history, since Friends often maintain the same telephone number even if changing their place of residence.



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VIEW PANE

Client Inquiry

Back Save

Client Profile Client Identification Open Case Review Household Request Details Other Agencies Eligibility Submitted

First Name  MI  Last Name\*  Maiden Name

Gender  Marital Status  DOB  SSN  Up to last five digits

Ethnicity  Church

Spanish Only  Homeless  Veteran  Grade  ←

Other Aid  Child Support  Food Stamps / SNAP  Medicaid  Medicare  Section 8  
 Social Security  SSI Disability  Unemployment  Veteran  WIC ←

Phone  ← Alternate Phone  Work Phone  Email

Address

City  State  Zip  County

10. **Email** – enter the Friends email address if one is given to you. This will help us communicate with the Friend if you are unable to contact him or her by telephone.

11. **Address** - in the first address line, enter the street address and in parentheses put the name of the Apartment Complex where the friend lives (which may be different from the leasing office). In the second Address line, put the name of the Apartment Number. Also enter where indicated the City, State and Zip (it is optional if you want to enter the County or the number of years living at that address).

12. Click **NEXT>>** at top right. This will take you through several **Client Identification** pages that will try to match the name, address and telephone number. If there is an exact match, it will appear at the top of the list.



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VIEW PANE \*

Client Inquiry Back Save Next >>

**Client Profile** Client Identification Open Case Review Household Request Details Other Agencies Eligibility Submitted

First Name  MI  Last Name\*  Maiden Name

Gender  Marital Status  DOB  SSN  Up to last five digits

Ethnicity  Church

Spanish Only  Homeless  Veteran  Grade

Other Aid  Child Support  Food Stamps / SNAP  Medicaid  Medicare  Section 8  
 Social Security  SSI Disability  Unemployment  Veteran  WIC

Phone  Alternate Phone  Work Phone  Email

Address

City  State  Zip  County  How long here?



- If there is a match, click on the name, which will take you to a **Review Client Match** page. At the bottom of the page, click on the word **Past Assistance**, which will show you the past assistance provided.

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VIEW PANE

Client Inquiry

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Inquiry No.  Client

[Client Profile](#)
[Client Identification 1/3](#)
[Open Case Review](#)
[Household](#)
[Request Details](#)
[Other Agencies](#)
[Eligibility](#)
[Submitted](#)

The results below include both matches on clients and household members. Rows with a grey background represent household member matches.

Address

1-10

Status	Last	First	DOB	Phone	Gender	Marital	Zip	Address
Active	Test	Client4			Male	Married	77008	123 anyway
Active	Test	Client5			Male	Married	77008	123 anyway
Active	Test	Son	03/16/1987		Male		77008	123 anyway
Active	Claris	Dane			Female	Unknown	77001	123 anyway
Active	nguyen	Huey			Male	Married	77001	123 Anyway
Active	test50	test	01/01/1970	823-456-8616	Male	Married	77001	123 anyway
Active	test50	test	01/01/1972		Male	Married	77008	123 anyway
Active	test50	test	01/01/1940		Female	Unknown	77008	123 anyway
Active	test50	test					77008	123 anyway
Active	Trinh	Christina	01/01/1974		Female		77001	123 Anyway

Review Client Match

Compare this client profile with what you entered previously. The left tab is the selected client, and the right tab is the profile you entered previously.

If you determine they are the same client, use the Select button to proceed with the client on the left. Otherwise, use the Back button to return to the list and select another client.

Client Status

Active

Client

Current Match Intake Profile

First Name

Client4

MI

Last Name

Test

Gender

Male

Marital Status

Married

DOB

SSN

Up to last five digits

Phone

Alternate Phone

Work Phone

Email

Address

123 anyway

City

Houston

S



Past Assistance





- If the Friend was recently helped and the decision is made not to provide additional assistance, click **Cancel** at the top left hand side of the page, which will delete all of the information that was entered during intake. The intake volunteer can then advise the Friend that he or she is not eligible and when they will next be eligible for assistance.

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VIEW PANE

Client Inquiry

Back Cancel Overview << Previous Next >>

Inquiry No. 23-09301 Client test, Client4

Client Profile Client Identification 1/3 Open Case Review Household Request Details Other Agencies Eligibility Submitted

The results below include both matches on clients and household members. Rows with a grey background represent household member matches.

Address 123 anyway%

1-10

Status	Last	First	DOB	Phone	Gender	Marital	Zip	Address
Active	Test	Client4			Male	Married	77008	123 anyway
Active	Test	Client5			Male	Married	77008	123 anyway
Active	Test	Son	03/16/1987		Male		77008	123 anyway
Active	Claris	Dane			Female	Unknown	77001	123 anyway
Active	nguyen	Huey			Male	Married	77001	123 Anyway
Active	test50	test	01/01/1970	823-456-8616	Male	Married	77001	123 anyway
Active	test50	test	01/01/1972		Male	Married	77008	123 anyway
Active	test50	test	01/01/1940		Female	Unknown	77008	123 anyway
Active	test50	test					77008	123 anyway
Active	Trinh	Christina	01/01/1974		Female		77001	123 Anyway



- If assistance was not previously provided or a decision is made to provide additional help to a Friend who was previously helped, click on both the Current Match and the Intake Profile tabs to determine which information is most up-to-date and then choose **Select** at the top right of the page for the most current information.



VIEW PANE

Review Client Match

Back Cancel Request Merge **Select**

Compare this client profile with what you entered previously. The left tab is the selected client, and the right tab is the profile you entered previously.  
If you determine they are the same client, use the Select button to proceed with the client on the left. Otherwise, use the Back button to return to the list and select another one.

Client Status Active

Client

Current Match Intake Profile

Map of 123 anyway

First Name test MI Last Name test50 Maiden Name

Gender Male Marital Status Married DOB 01/01/1970 SSN Up to last five digits

Phone 823-456-8616 Alternate Phone Work Phone Email

Address 123 anyway

City Houston State Texas Zip 77001 County How long here?

- If there is no match to the intake name, address or telephone number, click **NEXT>>** on each of the Client Identification pages until you get to the **Open Case File** tab.



VIEW PANE

Client Inquiry

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[Overview](#)
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Inquiry No.  Client

[Client Profile](#)
[Client Identification 1/4](#)
[Open Case Review](#)
[Household](#)
[Request Details](#)
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[Submitted](#)

The results below include both matches on clients and household members. Rows with a grey background represent household member matches.

Note: The clients below match in one or more of the search parameters shown.

Phone 
 Alternate Phone 
 Work Phone 
 Email

No results found.

VIEW PANE

Client Inquiry

[Back](#)
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[Red-Flag Client](#)
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Inquiry No.  Client

Inquiry

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Current Selection: Client4 Test at 123 anyway. [Keep](#) [Clear Selection](#)

The results below include both matches on clients and household members. Rows with a grey background represent household member matches.

First Name 
 DOB

1-4

Status	Last	First	DOB	Phone	Gender	Marital	Zip	Address
Active	test	Client	01/01/1970	234-567-8901	Male	Married	77001	123 Any Street #2
Active	Test	Client2	01/01/1970		Male	Married	77001	12345 Anyway
Active	test	Client3	01/01/1970	867-456-8948	Male	Married	70001	234 Anyway
Active	test3	client	01/01/1970	234-567-8901	Male	Married	77001	123 Anystreet

14. In **Household** enter **First Name, Last Name, Gender and Relationship** (and **Ethnicity** if you know it) of others living in the same household. If you don't know this information, click on **NEXT>>** at top right and the Caseworker can complete the information after the Home Visit.

15. **NEXT>>** at top right to proceed to the **Request Details** tab.



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Case Intake << Previous Next >>

Conference Training Conference Case No. 2023-09301 Client test, Client

Case

Client Profile Client Identification Open Case Review Conference Household Request Details Other Agencies Eligibility Submitted

A yellow row indicates the person was added during intake.  
 DOB: If you know the persons DOB, enter it as MM/DD/YYYY. Otherwise, you may enter an estimated birth year, such as 1976, or age in years, such as 32.

Del	First Name *	Last Name *	DOB	Gender *	Relationship	Ethnicity	SSN (Up to last 5)	Veteran?	Grade
<input type="checkbox"/>	Client1	Test	12/29/1980	Female	Spouse or Partner	Undisclosed		<input type="checkbox"/>	
								<input type="checkbox"/>	

Please do not reenter in the Household tab the name and other information about the Friend in the Client Profile. Only enter information about others living in the household, including a spouse or roommate and children. You can enter the children age in the DOB field of the exact date of birth is not known.





17. **NEXT>>** at top right to proceed to the **Other Assistance** tab, **NEXT>>** at top right to proceed to the **Eligibility** tab and **NEXT>>** at top right to proceed to the **Submit** tab.

- Click Yes on the pop up box that asks "Submit the case for caseworker assignment".

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Case Intake

Back Cancel Overview Save Refer << Previous Next >>

Conference Training Conference Case No. 2023-09362 Client Test, Client

Case

Client Profile Client Identification Open Case Review Conference Household Request Details Other Agencies Eligibility Submitted

This appears to be a new client, and therefore, no case history is available.

Current Request:

Category	Comment
Rent/Mortgage/Shelter	HN - Need \$300 for rent

**Confirm Action**

Submit the case for case worker assignment? (This action can not be undone).

Yes No



The Case Intake has been completed when you get to the **Submitted** tab. The case is now ready for one of the Case manager or schedulers to schedule a home visit and assign a case manager and caseworkers. Click on the **Home** tab at the top of the page.

NOTE: depending on Conference procedures, the person responsible for scheduling a home visit should go to the **Submitted** tab, use the drop down menus to select a Case Manager, a Caseworker, and a Secondary Caseworker and then click **Assign**. The Case will now show up in the Assigned Cases (on the Homepage Menu) of the Vincentians assigned as Case Manager, Caseworker and Secondary Caseworker. If no assignments are made, the case will go to the Unassigned Cases (on the Homepage Menu) awaiting assignment.

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Case Intake Completed Accept Assign OK

Save

Case Worker \* Select Case Manager Select Secondary Select

Case

Client Profile Client Identification Open Case Review Household Request Details Other Agencies Eligibility **Submitted**

The case intake has completed.  
The case has been filed to a work list for assignment to a case worker.

As a Case Worker in Training Conference, you may go ahead and assign this case to yourself right away, using the Accept button above. If not, the case will be available for any Case Worker in this conference to assign to themselves.  
If you assign yourself to this case now, please designate a secondary case worker and case manager from the lists above, if applicable.

You can also assign this case to another case worker. To do so, select a Case Worker above, and, optionally, select Case Manager and Secondary.  
Note: You must use the ASSIGN button to have this assignment take effect. Clicking ACCEPT will assign the case to yourself regardless of case worker selection. Clicking OK will leave the case in the unassigned list.  
Consult the accordions below to review your fellow Vincentians availability when making these selections.

Availability Case Instructions Past Assistance

**Don't click Home yet if you need to make assignment on this page.**



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for St Vincent de Paul**

Questions?