Society of Saint Vincent DePaul
Our Lady of the Lake Catholic Church
Helpline and Home Visit Policy and Procedures

Policy

It is the policy of SVdP OLOL that we respond to requests for assistance in a timely manner. We treat clients with respect and dignity. We collect as much information from clients as necessary to asses and confirm their needs, enabling SVdP to make the best decision possible. We secure and protect their confidential information. We advocate for our clients.

Helpline Procedures

- OLOL SVDP Help Line: 972-772-8875. We use a Vonage internet phone system through an app on our cell phones.
- Call the client back within 24 hours of the time the message was left.
- Confirm that the client lives in Rockwall County or Royse City ISD. If not, refer them to the SVdP conference in their area (See conference zip code listing with phone numbers on Member Web Page).
- Using the one page Client Interview form, obtain the client's name/address/phone number and any other information the client is willing to provide over the phone.
- Ask client if they have visited Helping Hands (HH); if not, refer them to HH first. However, if the client has not lived in Rockwall for more than 6 months, HH will not provide assistance. In either case, a home visit may be considered.
- Confirm if we have helped the client before. You can do this by checking our database. (See Database Tips on ways to find/search for a client.) If we have assisted the client previously, has it been within the last 12 months up to our limit? If we have helped within the last 12 months up to our limit, refer clients to other agencies, if possible.
- Generally, we have a limit of $300 within a 12 month period of time to help a client (or $350 for OLOL parishioners). However, special circumstances will be considered. Also, this limit may, at times, be adjusted up or down depending on the balance of our funds.
- Any amounts over the limit or additional payments within 12 months must be approved by sending an email referencing the case to all members.
- If it is determined we have not assisted a client before, the lead team member should immediately add a new client record to the database. If we have assisted the client before, the lead team member should update the client's base record with any new information received from the phone call. If assistance is refused, the lead team member should add a history record to the client's base record noting the assistance requested and the reason for refusal.
- If it is determined a home visit is necessary, schedule a home visit with the client.

Home Visit Procedures:

- Members make home visits in pairs (or threes).
- Say a short prayer before and after the home visit.
- Consider praying with the client if you wish and it fits.
- Usually, share only your first name with the client.
- Obtain a signed consent form to discuss client's case with third parties (i.e. the conference, landlords, utility companies, other agencies, etc.).
- Provide client with a resource sheet.

Decision Making Procedures

- The team will determine whether or not assistance is appropriate.
- If the team feels that assistance over their authority is required or they would like other members' opinions about a case, they will bring the matter to the Conference for approval. If a Conference meeting is not scheduled to occur within a couple of days, the lead team member will send an email to the Conference members asking them to review the Record number and vote. **Please only reference the client's Record number and first initial, last name in any emails. Do not use the client's full name or personal information.** Conference members will respond to request within 24 hours.
- After the home visit and the help/no help decision is reached, the lead team member is responsible for adding a history record to the client's base record in the database that details the information obtained from the home visit. The client's record should be updated or added to the database as soon as possible, but no later than 5 days after the initial contact.
- If the team determines assistance is appropriate, the lead team member is to contact the landlord or utility company and advise of SVdP's pledge. Then he/she is to email the Treasurer and cc the Secretary to coordinate payment on the client's behalf. (Please only reference the client's Record number and first initial, last name in any emails. Do not use the client's name or personal information.) The Treasurer will send payment to the vendor and update the client's history record with the check number and amount sent.
- Payments will not be made directly to clients.
- Contact client and advise of payment. Refer client to other agencies, if necessary.
- Scan to pdf and upload signed confidentiality/release form to client's record in the database. If you are unable to scan and upload the form to the database, give it to Pres, VP, or Secretary for uploading.