

# *Intake Form for Assistance*

**Recommended Paperwork:** For Conferences, the Intake Form for Assistance is completed for every neighbor at the initial request for assistance and continually updated for each further request for assistance.

## **Why do we need to complete an Intake Form for Assistance?**

“We live today in a time of increasing scrutiny. With our Councils and Conferences serving millions throughout the United States, it is imperative that we demonstrate good stewardship by providing accurate, timely information to our Church, our donors, and the public.

Good recordkeeping is an essential part of Vincentian activity, beginning at the Conference level. While the actual recording of information is the responsibility of the Secretary, all members should keep written records of their Vincentian activities. A catalogue of recordkeeping materials and other operational resources is available from the National Office.” - Manuel, p 27-28 “Reporting Procedures and Forms”

## **Tips to simplify this paperwork:**

The “Case Record” form is an example you may use, but please note that **there is no requirement to collect all of the information on this form.** Indeed, it would be very uncommon to do so on a single home visit, but **it is up to Conferences to set their own guidelines for this.** In doing so, it is important to keep in mind that “people tend to share personal information more freely with their Vincentian visitors in the relaxed atmosphere of their own homes, Society members should be careful to **record only what is essential to serve them.**” (Manual, p.24) – Secretary’s Minute Book 2021

Sample Case Record can be found on page 19 of the Secretary's Minute Book 2021 which can be downloaded from this link [Leadership – St. Vincent de Paul USA Member Site](#) click on Conference Secretary.