

PEOPLE IN NEED PROCEDURE

PRIOR TO MEETING

- **PIN APPLICATION** SUBMITTED FOR ASSISTANCE
- SCHEDULE PIN APPOINTMENT
- **PIN FILE** PULL OR CREATE NEW
- MOBILE TOOLS > PARTICIPATION RECORD – VERIFY MEMBER/OR ATTENDER

PIN MEETING

- NO MORE THAN 2-3 PIN VOLUNTEERS
- **PIN FILE** NEEDED FOR MEETING
- ORIGINAL BILLS RECEIVED FOR PAYMENT (IN PERSON'S NAME)
- **NEXT STEPS FORM** (OPTIONAL IF NEEDED)
- **GROCERY CARD RECEIPT** (IF GIVEN) SIGNED BY PIN RECIPIENT
- **COUNSELING REFERRAL FORM** (IF OFFERED)
- PLEASE COMMUNICATE THAT DECISIONS ARE MADE AFTER THE MEETING BY THE TEAM

AFTER MEETING

- FOLLOW-UP: PHONE CALL MADE TO THE PIN RECIPIENT REGARDING DECISION AND NEXT STEPS
- MEETING REPORT: PLEASE SUBMIT FINANCIAL ASSISTANCE LOG AND ANY GIFT CARDS GIVEN TO <https://clearcreek.wufoo.com/forms/cccc-financial-assistance-report-2020/>
- COUNSELING REFERRALS: SUBMITTED TO THE OFFICE TBISHOP@CLEARCREEK.ORG or <https://clearcreek.wufoo.com/forms/cccc-counseling-referral/>
- CHURCH CREDIT CARD PURCHASES: (PRIMARILY USED FOR UTILITIES, BILLS, ETC.)
 - BILLS MUST BE IN THE PIN RECIPIENTS' NAME
 - MAKE SURE THE CARD INFORMATION DOES NOT GET SAVED UNDER RECIPIENTS' ACCOUNTS
 - PLEASE SUBMIT YOUR RECEIPTS TO TALLIE AND PROCESS YOUR EXPENSE REPORT ONLINE WITH TALLIE
 - IF YOU DO NOT HAVE A CHURCH CREDIT CARD, PLEASE WORK WITH YOUR CAMPUS PIN TEAM MEMBERS WHO DO HAVE ACCESS TO MAKE SUCH PURCHASES.
 - IF ANY BILLS CANNOT BE PAID WITH THE CHURCH CREDIT CARD, PLEASE SUBMIT **ORIGINAL PAPER COPIES** TO THE OFFICE WITH A CHECK REQUEST
- PROCESSING CHECK REQUESTS: (PRIMARILY USED FOR RENT, MORTGAGE AND OTHER)
 - FILL OUT **CHECK REQUEST FORM** WITH APPROVED SIGNATURES
 - BILLS MUST BE IN THE PIN RECIPIENTS' NAME
 - ATTACH COPY OF CURRENT LEASE/MORTGAGE
 - W9 IS REQUIRED (FOR LEASES AND RENT) OR SERVICES (EXAMPLE: CAR REPAIRS, ETC) <https://www.irs.gov/pub/irs-pdf/fw9.pdf>
 - OFFSITE CAMPUSES: FOR LEASE/OR MORTGAGES, PLEASE EMAIL A COPY AND THE CHECK REQUEST FORM TO FINANCE TRICHARDSON@CLEARCREEK.ORG AND CC: SWESLEY@CLEARCREEK.ORG
 - FOR BILLS, UTILITIES OR OTHER REIMBURSEMENTS **NOT ALREADY PAID BY THE CHURCH CREDIT CARD**, PLEASE SUBMIT **ORIGINAL PAPER COPIES** TO THE OFFICE WITH A CHECK REQUEST FORM