The CAF Handbook

How to administrate the Criminal Appeals Fund platform

Hello. Here is a comprehensive guide for managing [the Criminal Appeals Fund platform](#) that should hopefully cover everything you need to ensure users can be verified and their cases reviewed.

In this guide:

The website

The website splits the user journey into two parts:
- Setting up as a user, and
- Developing an application for funding

Setting up as a user

Once they have read about the process on the landing page, a user will first sign up using a unique email address, along with other required details, and to complete the sign up process is asked to upload two documents to verify their identity. These are their practising certificate and photo ID.

All this information is uploaded to Airtable for your review and verification.

They are then taken to their profile page, and must wait to be verified. Once this has happened, they are able to make an application.
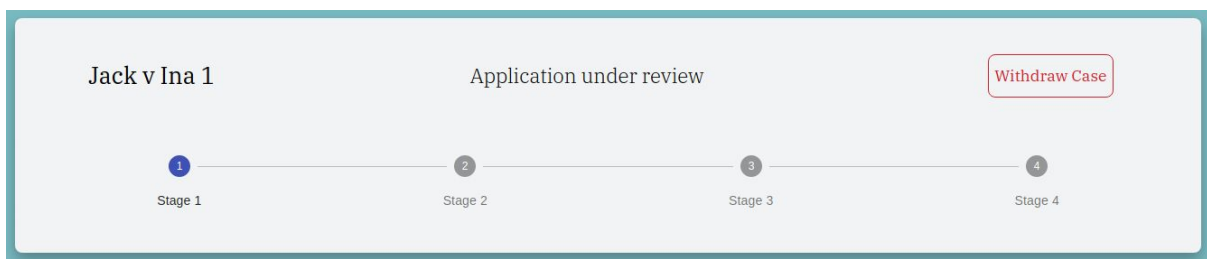
Applying for funding

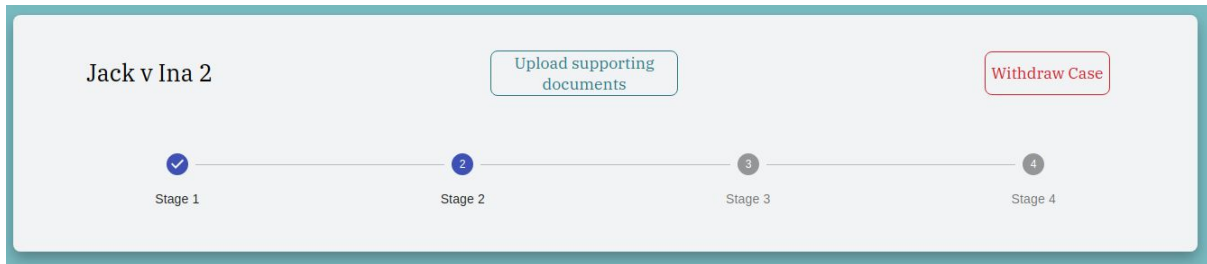There are several steps a user goes through for accessing funding through CAF:
1. User creates and submits an application

    a. User submits required details of case, and uploads:
        i. Proof of litigation extension
        ii. Signed waiver of legal privilege
        iii. Proof of financial means

2. Application satisfies criteria

Jack v Ina 2   Upload supporting documents   Withdraw Case

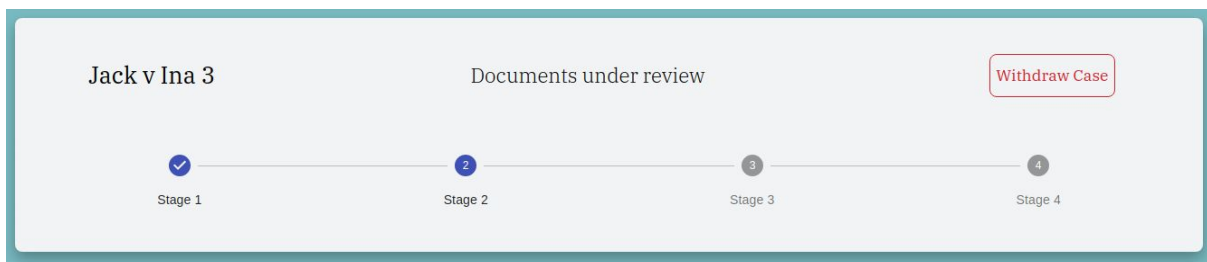✓ Stage 1 —— ② Stage 2 —— ③ Stage 3 —— ④ Stage 4
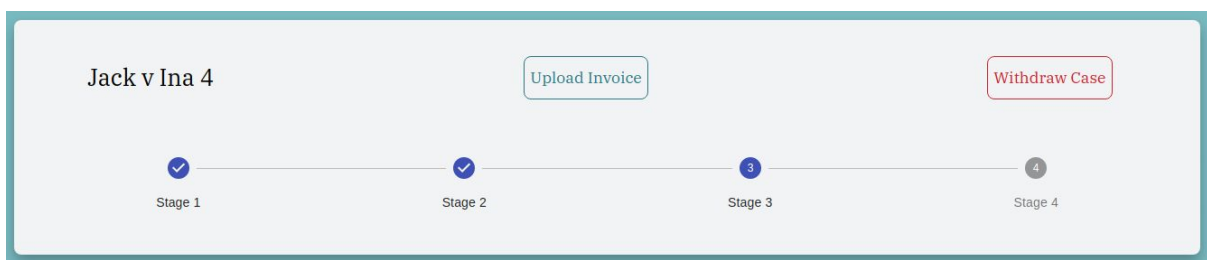
    a. User uploads supporting documents

As part of the application, please upload supporting evidence on how the case meets the criteria outlined by the Criminal Appeals Fund

Upload documents | SUBMIT DOCUMENTATION

    b. And awaits approval

Jack v Ina 3   Documents under review   Withdraw Case

✓ Stage 1 —— ② Stage 2 —— ③ Stage 3 —— ④ Stage 4

3. Final approval

Jack v Ina 4   Upload Invoice   Withdraw Case

✓ Stage 1 —— ✓ Stage 2 —— ③ Stage 3 —— ④ Stage 4
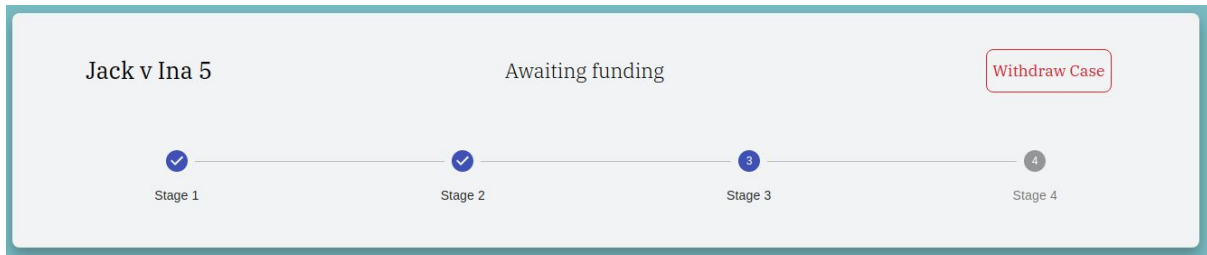
    a. User uploads invoice

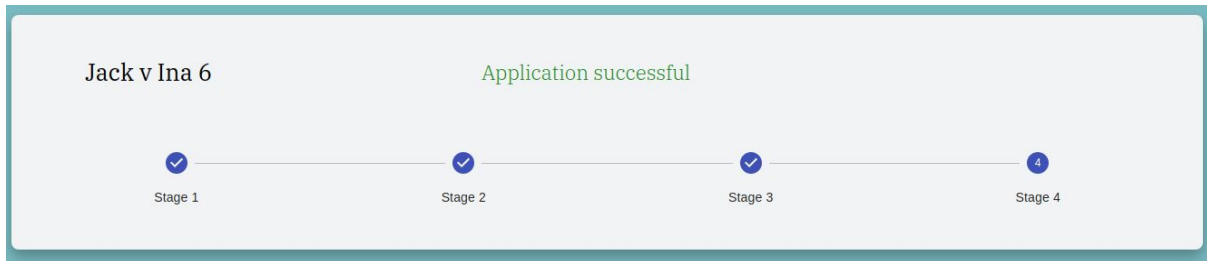# Upload your invoice

Congratulations on securing funding!

Upload your invoice here so that we can process this as quickly as possible.

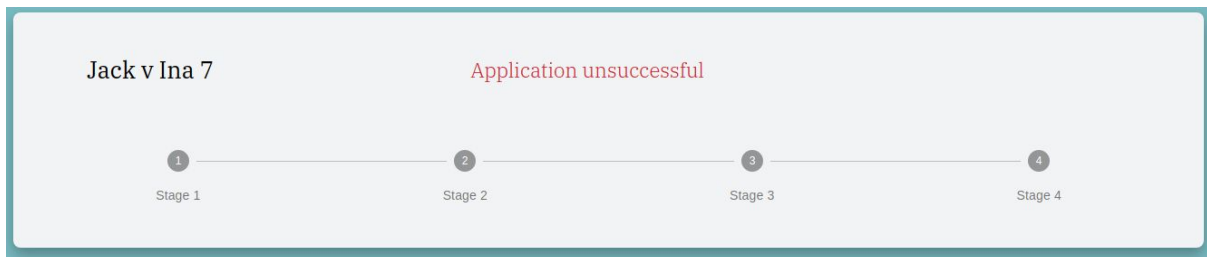Please ensure your it is in one of the following formats: pdf, docx or doc.

UPLOAD DOCUMENTS

SUBMIT DOCUMENTATION

b.   And awaits funding

Jack v Ina 5   Awaiting funding   Withdraw Case

| ✓ | ✓ | 3 | 4 |
| Stage 1 | Stage 2 | Stage 3 | Stage 4 |

4.   User receives funding

Jack v Ina 6   Application successful

| ✓ | ✓ | ✓ | 4 |
| Stage 1 | Stage 2 | Stage 3 | Stage 4 |

At any stage, the administrator may close the application

Jack v Ina 7   Application unsuccessful

| 1 | 2 | 3 | 4 |
| Stage 1 | Stage 2 | Stage 3 | Stage 4 |

At any stage prior to securing funding, an applicant may withdraw an application

Jack v Ina 8   Application withdrawn

| 1 | 2 | 3 | 4 |
| Stage 1 | Stage 2 | Stage 3 | Stage 4 |
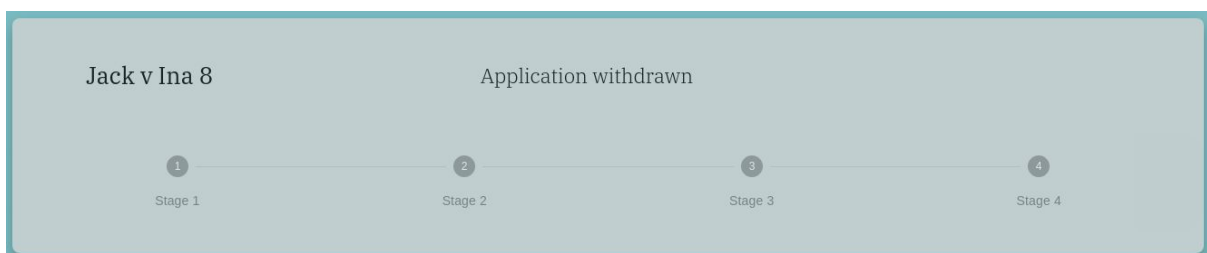
That's basically it for the front end. Users can sign out and this ends their session.
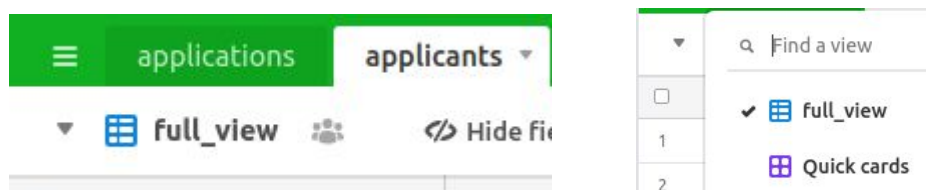
Airtable

All the data is kept safely here. There are two tables that you will be interested in:
- applicants
- applications

It is also worth noting each table also has two views that have each been sorted and colour coded:
- **full_view**: all the details in a regular spreadsheet
- **Quick cards**: easy access panels to review and make quick updates

The view can be selected by clicking their name here:

Quick cards view has been designed for your ease of use.

Applicants

full_view

Email addresses are always unique and therefore are used to link applicants to applications. The applications associated can be seen in the table on the right, as can passwords - these have been *hashed* which means that even though you can see them it is impossible for you to know what they are.

Quick cards

These are the quick cards, which are coloured **red** if they have not yet been verified, or **green** if they have, and sorted red first. In order to verify them, you can simply click a card and check the box that says *isVerified*:

This will allow the user to make an application, i.e. step 1 in Apply for funding above.

Applications

full_view

The *applications* table contains all the data you are looking for, including what people have written in the fields in your forms. It also refers to the stage that each application is at (an application can only be at one stage). You will need to look here for the detailed answers, especially to longer questions of merit and social value.

These are sorted first by *status* and then by *date_updated* so you can see the order in which applications need to be processed. They are colour coded such that *Withdrawn* and *Unsuccessfully closed* applications are grey, *Successfully closed* are green, otherwise applications started more than three days ago are red and any where the last update was before yesterday are orange. All the others are blue.

Quick cards

Here you can update the status of applications quickly as with users. Click the card, remove the current status, and increase the number by 1 to progress to the next stage. It is really important to follow the right steps here, so colour coordination is slightly different to help with this - **only ever change the status of orange cards**. The blue ones are updated automatically when users take action.

Statuses

1   Application submitted - **you to confirm meets criteria**
2   Criteria met - **user to upload supporting documentation**
3   Upload documents - **you to deem successful**
4   Success - **user to upload invoice**
5   Invoice - **you to arrange payment of invoice**
6   Successful close
7   Unsuccessful close
8   Withdrawn

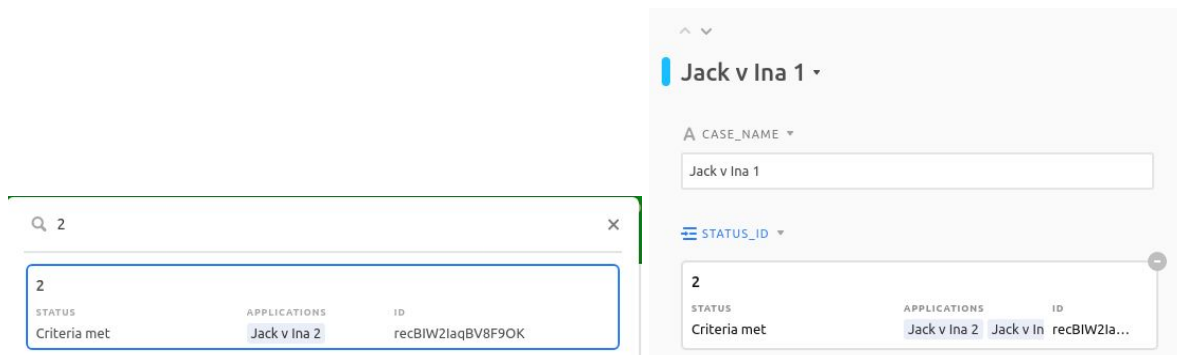Action for you   Action for user   No further action

Here is an example of updating a case from 1 (Application submitted) to 2 (Criteria met).

1. Click the remove icon in the top right of the STATUS_ID box

2. Click **Link to a record from status** and enter the next status (i.e. 1>2, 3>4, 5>6 or any to 7)


That should be everything you need on Airtable. It's best to interact with the data and the views as little as possible, ideally only making changes in *Quick cards* view in the way outlined above. If a user needs to upload further documentation on a previous stage, you can easily set them back to **one of the statuses in blue outlined above**.

Cloudinary
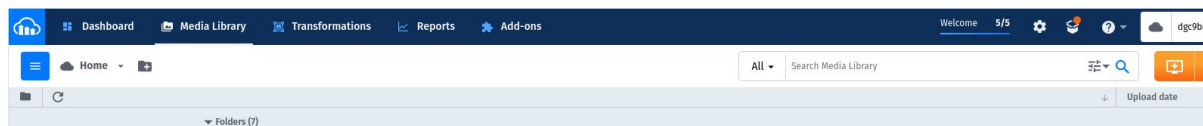
You only need to bother with the Media Library tab at the top. Cloudinary can be a bit tricky to get the hang of but otherwise works just like Dropbox.

All files are uploaded to Cloudinary. When a user creates an account this creates a folder named by their *email address* and their proof of identity is uploaded here, and when an applicant creates an application, this creates a folder named by their *case name.* Then, when files are uploaded to that application folder, these are named by the stage they're at - *application*, *documentation* and *invoice.* In practice, it looks like this:
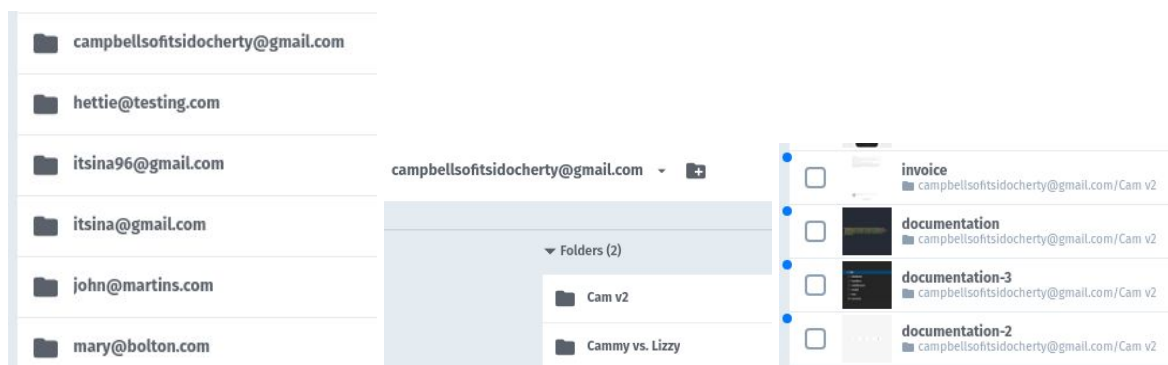
This means that you should be able to easily navigate applications and identify documents relating to different stages. Just to be clear, the path for finding any given document on from the Cloudinary media library is

- ***[Email address]***
  - *Verification files*
  - ***[case name]***
    - "Application-1"
    - "Application-2"
    - "Documentation-1"
    - "Documentation-2"
    - "Invoice-1"
  - ***[case name]***
    - "Application-1"
    - "Documentation-1"
    - "Documentation-2"
    - "Documentation-3"
    - "Invoice-1"
  - etc...

Important info

Log in details

The associated email address for all platforms is tfb.caf@outlook.com.
Platform - password - purpose

Airtable	-	---	-	data storage
Cloudinary	-	---	-	file storage
Netlify	-	---	-	website host (no need to access this)
Outlook	-	---	-	email client (feel free to use if you like)

Further support

Don't hesitate to contact us on Slack with any questions and clarifications. Following July, your best contact is Dan or Gregor. Please prioritise anything that isn't clear in this guide, or quick fixes to the site that we might fit into the time we have left on the course.

Thank you!

Cammy, Liz, Ina, Jack