Training Manual

Housing First / RRH / Housing Support Worker

County of Simcoe

Prepared by

ACRE Consulting

2018-12-21

Contents

CHAPTER 2: Case Management

Chapter Contents

Understanding Case Management in HIFIS 4

The Case Management module contains **Case Files**. A Case File in HIFIS 4 is a type of **service record** that indicates that a **Client** is working with a **Caseworker** during a particular **date range** to achieve a particular **goal**.

The Case Management module is the logical place to store information regarded to case management activities. Features of the Case Management module include:

- Opening a Case File to store a related series of information about activities with a Client
- Assigning a Caseworker to the Client
- Including other family members in the Case File
- Selecting a goal that the Caseworker and the Client are working towards
- Setting a target date for the completion of the goal
- Indicating what are the contributing barriers or factors impacting the completion of this goal
- Tracking the status of the Case File
- Recording individual activities (Sessions) that are completed while pursuing this goal
- Setting appointments for this Case File
- Keeping case notes (Comments) related to this Case File
- Attaching files (Documents) to this Case File
- Custom Table support

One Case Per Goal

Each Case File has a one-to-one relationship with a goal (sometimes referred to as the desired outcome for that Case File). In other words, for every Case File, there is exactly one goal, and for every goal, there is exactly one Case File.

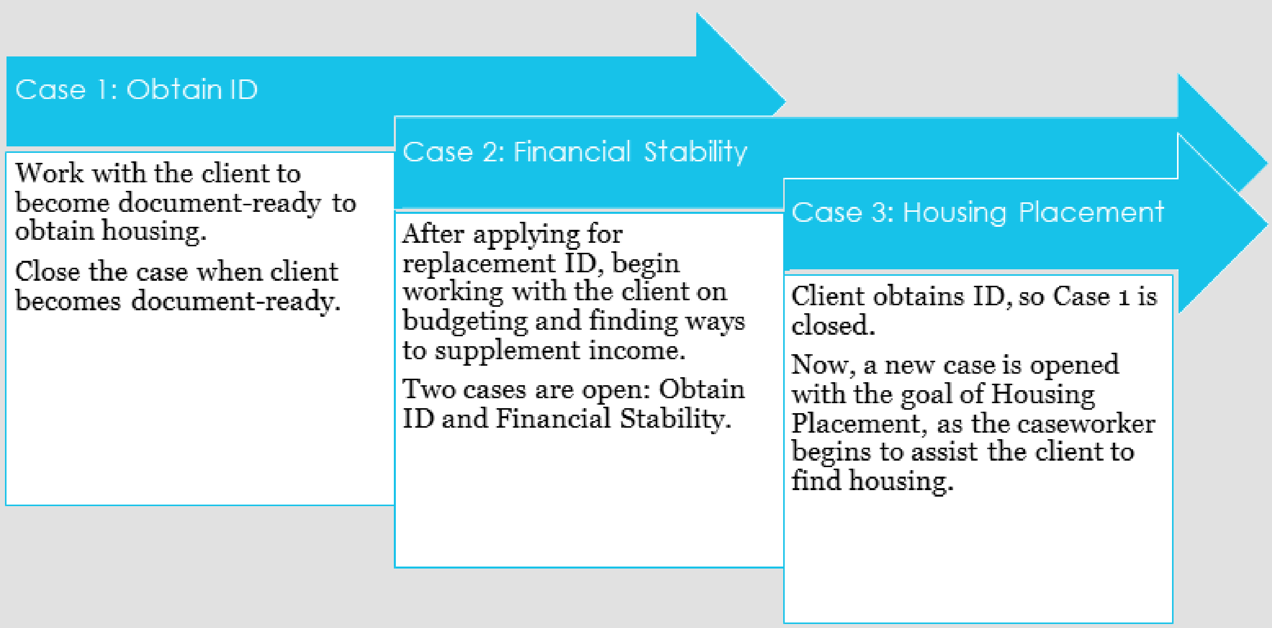
When used as intended, a Client could often have multiple cases open at a time. Each time a Caseworker meets with a client, they would first choose which goal the meeting (or Session) was related to, and record it in the appropriate Case File.

Example: Multiple Case Files in Practice

Imagine that Jasmine the Caseworker has been assigned to the client Aladdin, who is homeless. Jasmine sits down and meets with Aladdin, and they decide that the most important first step for Aladdin would be to obtain valid identification. His wallet was stolen while he was homeless and now he doesn't have any ID at all. Jasmine opens a case in HIFIS with the goal of "Obtain ID." Over the next few weeks, Jasmine meets with Aladdin several times, which she records as Sessions within the Case File with the goal of "Obtain ID."

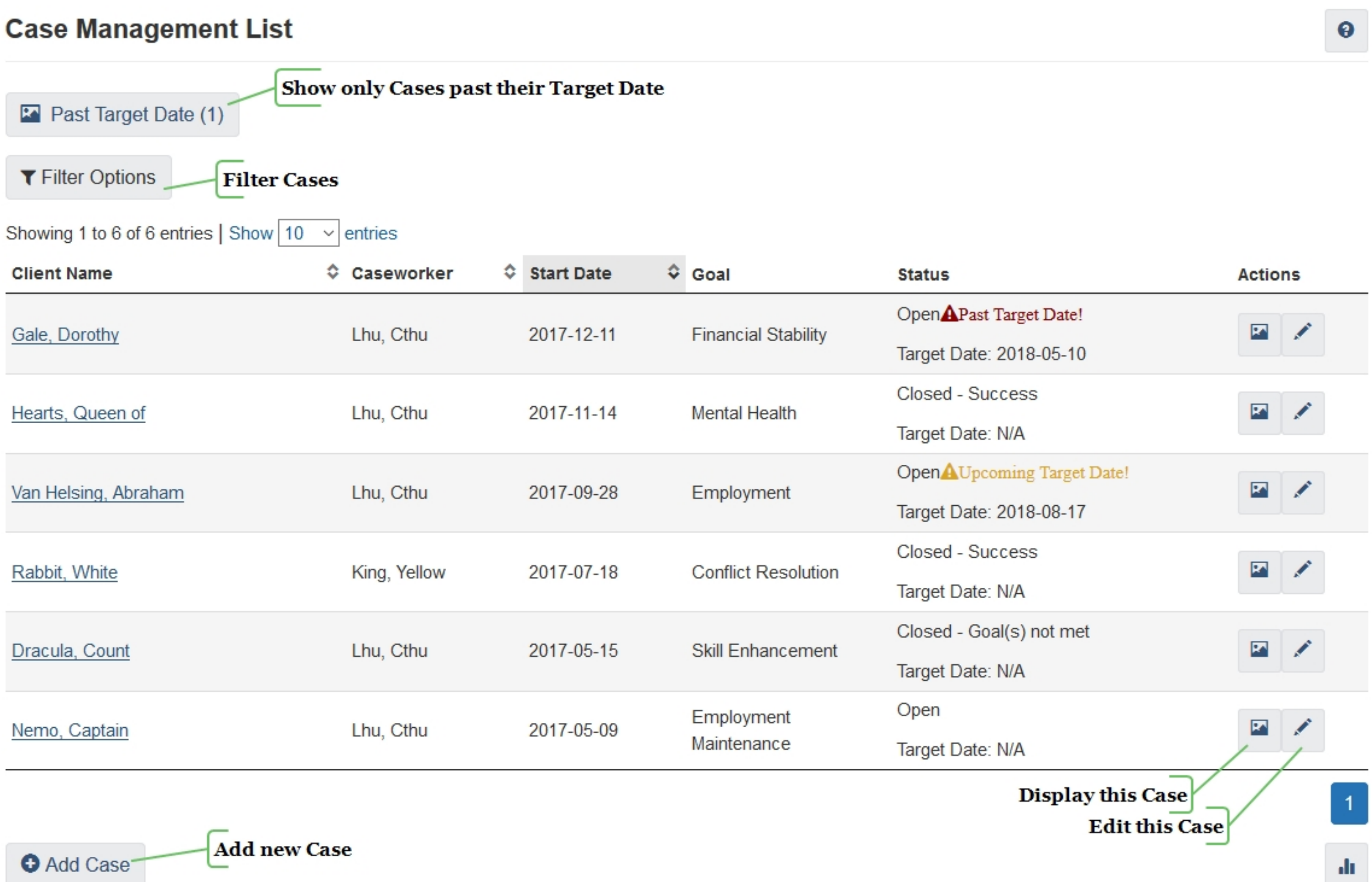
Finally, applications are in the mail, and Jasmine starts to switch gears and work with Aladdin on Financial Stability. She's noticed that he doesn't have a solid idea of what his monthly budget should be. She opens a second Case in HIFIS with the goal of "Financial Stability" even though the first Case File is not closed yet. She meets with Aladdin a few times, focusing on the goal of Financial Stability, before Aladdin's replacement identification arrives in the mail. She closes the Obtain ID Case File with a status of "Closed - Success." Now that Aladdin has all the documents he needs to be able to sign a lease, Jasmine opens a new Case File with the goal of "Housing Placement."

Having two open Cases for Aladdin, sometimes when Jasmine meets with him, they work on both goals simultaneously. These times, she can add a "Multiple Goal Session," indicating that she met with Aladdin and in one Session they worked on two or more Goals.



Case Management List

The **Case Management List** is reached via the Front Desk Menu by clicking on **CASE MANAGEMENT**. This page shows a list of all Cases opened by the active Service Provider, which can be filtered to only show a sub-section of all Cases.

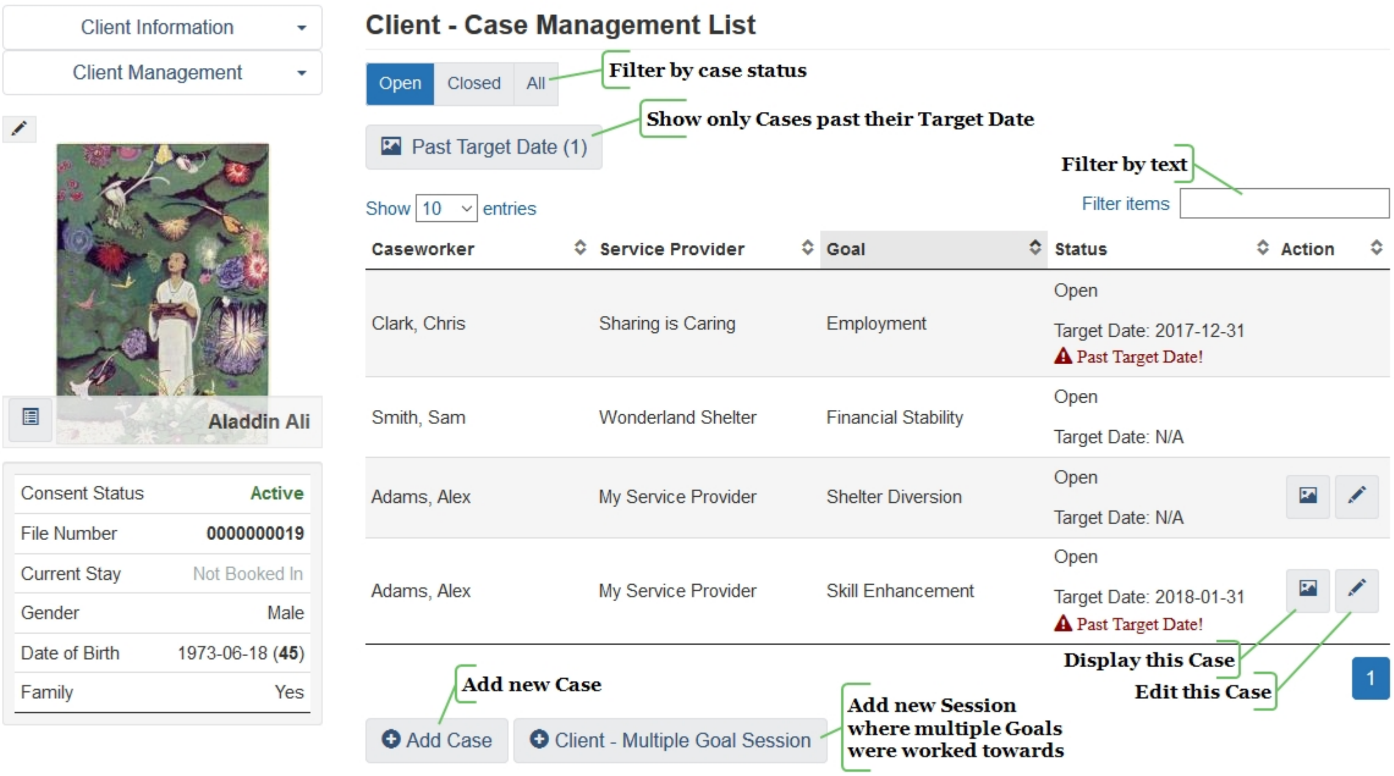


Client Name	Caseworker	Start Date	Goal	Status	Actions
Gale, Dorothy	Lhu, Cthu	2017-12-11	Financial Stability	Open Past Target Date! Target Date: 2018-05-10	
Hearts, Queen of	Lhu, Cthu	2017-11-14	Mental Health	Closed - Success Target Date: N/A	
Van Helsing, Abraham	Lhu, Cthu	2017-09-28	Employment	Open Upcoming Target Date! Target Date: 2018-08-17	
Rabbit, White	King, Yellow	2017-07-18	Conflict Resolution	Closed - Success Target Date: N/A	
Dracula, Count	Lhu, Cthu	2017-05-15	Skill Enhancement	Closed - Goal(s) not met Target Date: N/A	
Nemo, Captain	Lhu, Cthu	2017-05-09	Employment Maintenance	Open Target Date: N/A	

Client - Case Management List

The **Client - Case Management List** is reached via the Client Management Menu by clicking on Case Management. This page shows a list of all Cases belonging to the active Client, which can be filtered to only show a sub-section of all Cases.

The Client - Case Management List shows all Cases belonging to the active Client, including ones opened by other Service Providers. Therefore, the information on this page (Caseworker, Service Provider, Goal, Status, and Target Date) are shared with Users at other Service Providers. However Users can only Display or Edit Case Files that have been opened by Service Providers that the User has been granted appropriate Rights to.



How To: Add a Case

Go to the Case Management List

1. Click on the **FRONT DESK MENU**
2. Click on **CASE MANAGEMENT**

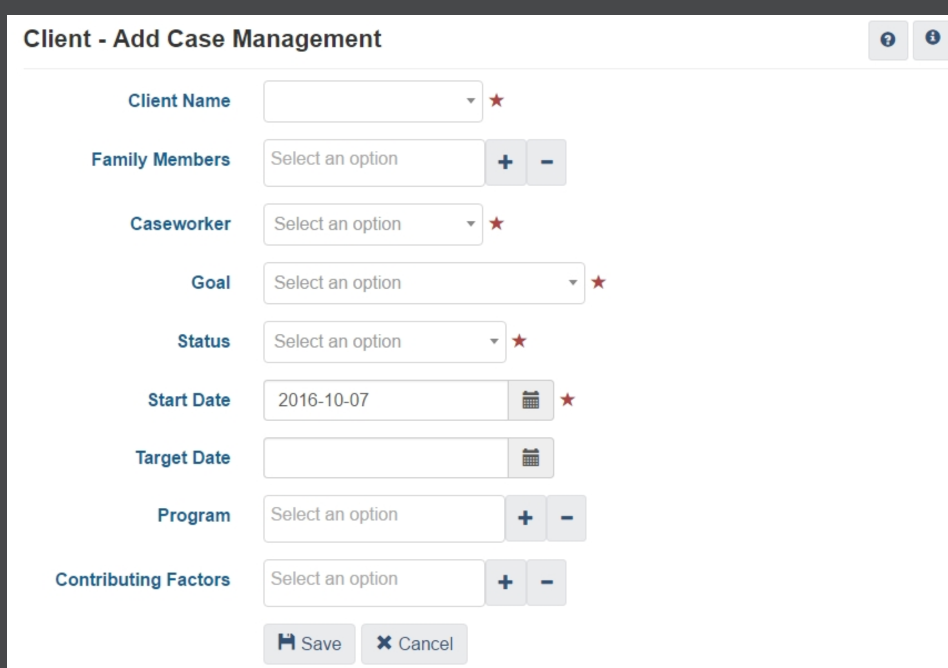
Now you're on the Case Management List (on page 7)

Alternatively, you could open a **Client File** and use the **Client Management Menu** to go to the Client - Case Management List (on the previous page) instead of going to the Case Management List (on page 7).

Add a Case

1. Click on the **ADD CASE** button.

Now you're on the **Client - Add Case Management** screen


Client - Add Case Management

Client Name ★

Family Members: Select an option + −

Caseworker: Select an option ★

Goal: Select an option ★

Status: Select an option ★

Start Date: 2016-10-07 ★

Target Date

Program: Select an option + −

Contributing Factors: Select an option + −

Save | Cancel

2. Select the Client Name. If you arrived here from the **Client - Case Management List** screen, this field is already filled out.
3. If there are any family members associated with this case, choose the family members involved by selecting them in the Family Members field.

> The Family Members field will only display if the selected client has family members.

4. Select the Caseworker assigned to the case.
5. Select the Goal for this Case.
6. Select the Case Status. Most of the time, this should be "Open."
7. Verify the Start Date. The default value is the current date, but this can be changed if needed.
8. Enter the Target Date for completion of this Case.
9. Select the Program(s) this Case is part of.
10. Select any of the Client's existing Contributing Factors that are related to this Case.
11. Click the **SAVE** button.

> Now you're on the **Display Case** screen

How To: Display a Case

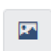
Go to the Case Management List

1. Click on the **FRONT DESK MENU**
2. Click on **CASE MANAGEMENT**

> Now you're on the Case Management List (on page 7)

> Alternatively, you could open a **Client File** and use the **Client Management Menu** to go to the Client - Case Management List (on page 8) instead of going to the Case Management List (on page 7).

Display

1. Click on  for the record you would like to display

> Now you're on the **Display** Screen

How To: Edit a Case

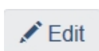
Go to the Case Management List

1. Click on the **FRONT DESK MENU**
2. Click on **CASE MANAGEMENT**

> Now you're on the Case Management List (on page 7)

> Alternatively, you could open a **Client File** and use the **Client Management Menu** to go to the Client - Case Management List (on page 8) instead of going to the Case Management List (on page 7).

Edit a Record

1. Click on  or 

for the record you would like to edit

> Now you're on the **Edit** Screen

How To: Close a Case

Edit a Case

See Edit a Case (on the previous page)

Close the Case

1. Change the Status field to either "Closed - Success" or "Closed - Goal(s) not met"
2. Verify the End Date
3. Click on **SAVE**

How To: Add a Session to an Existing Case

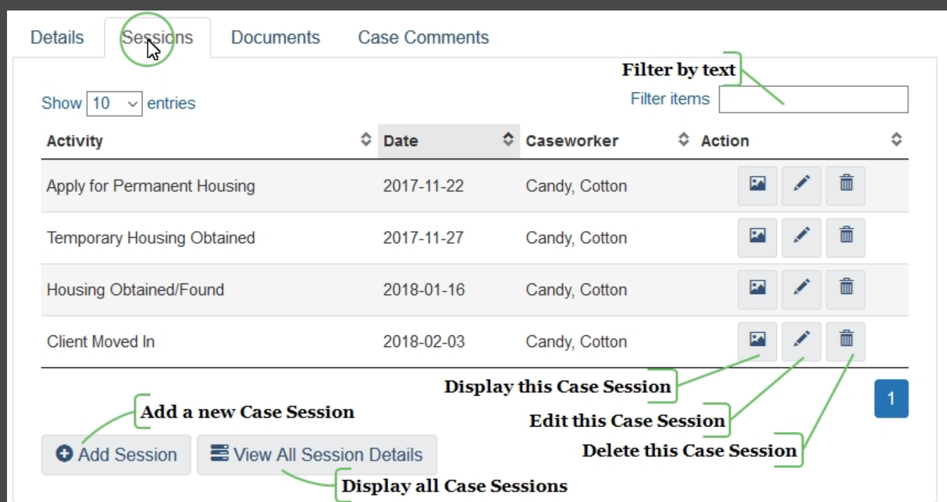
Edit a Case

See Edit a Case (on page 12)

Go to the Sessions Tab

1. Click on the **SESSIONS** tab

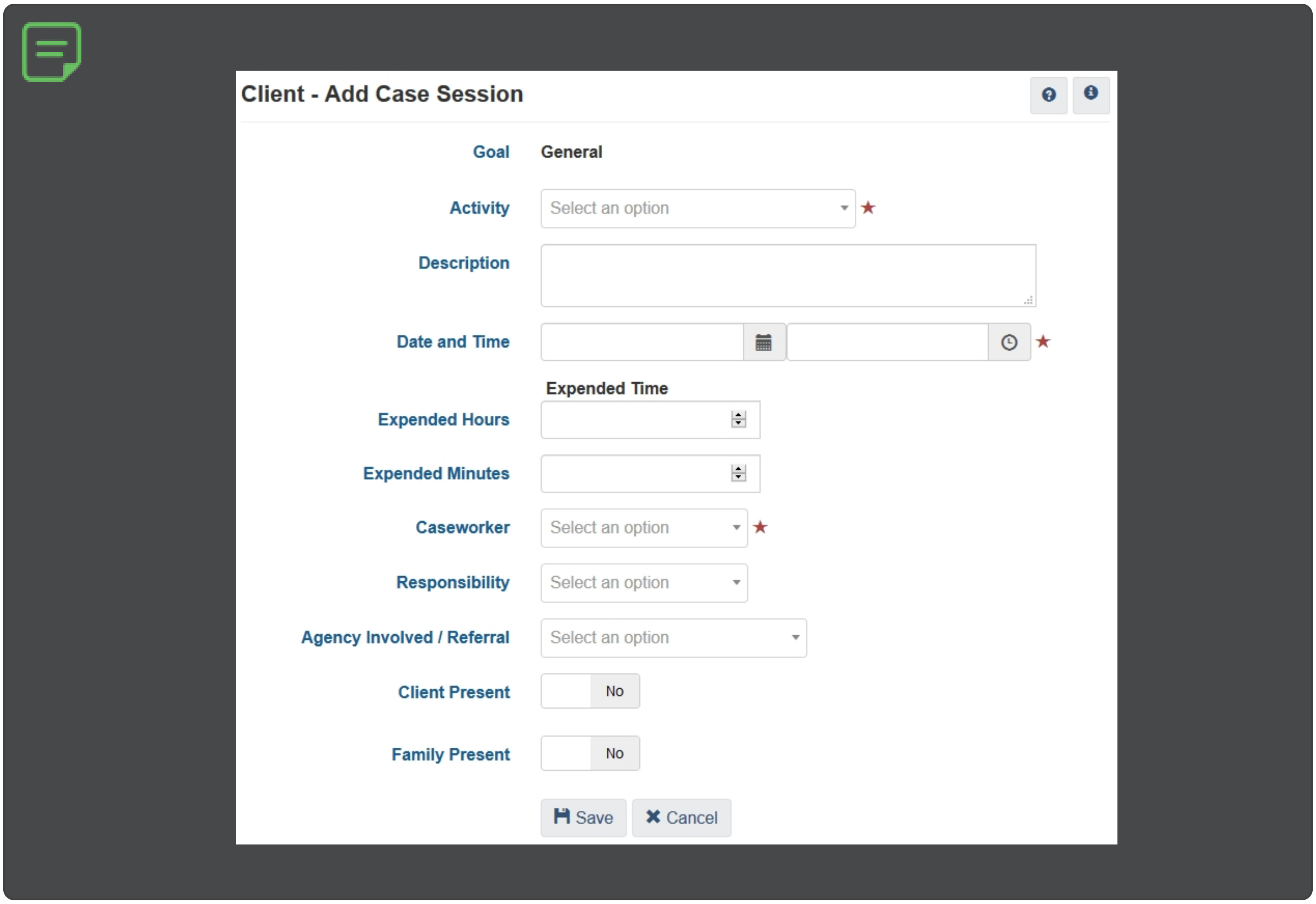
You're now on the **Sessions** tab



Add a Case Session

1. Click on the **ADD SESSION** button

You're now on the **Client - Add Case Session** screen



2. Select an Activity to reflect what occurred during this Session.
3. Enter a Description.
4. Verify the Date and Time of this Session. The default value is the current date and time, but this can be changed if needed.
5. Enter the duration of this Session in Hours and Minutes.
6. Select the name of the Caseworker who met with the Client this Session.
7. Select whose Responsibility it is to follow-up on the Session.
8. Select if there was an outside Agency involved in this Session.
9. Indicate whether the Client was present.
10. Indicate whether the client's Family was present.
11. Click the **SAVE** button.

You're now on the **Display Case Management** Screen

How To: Add a Session to Multiple Existing Cases

Go to the Client Case Management List

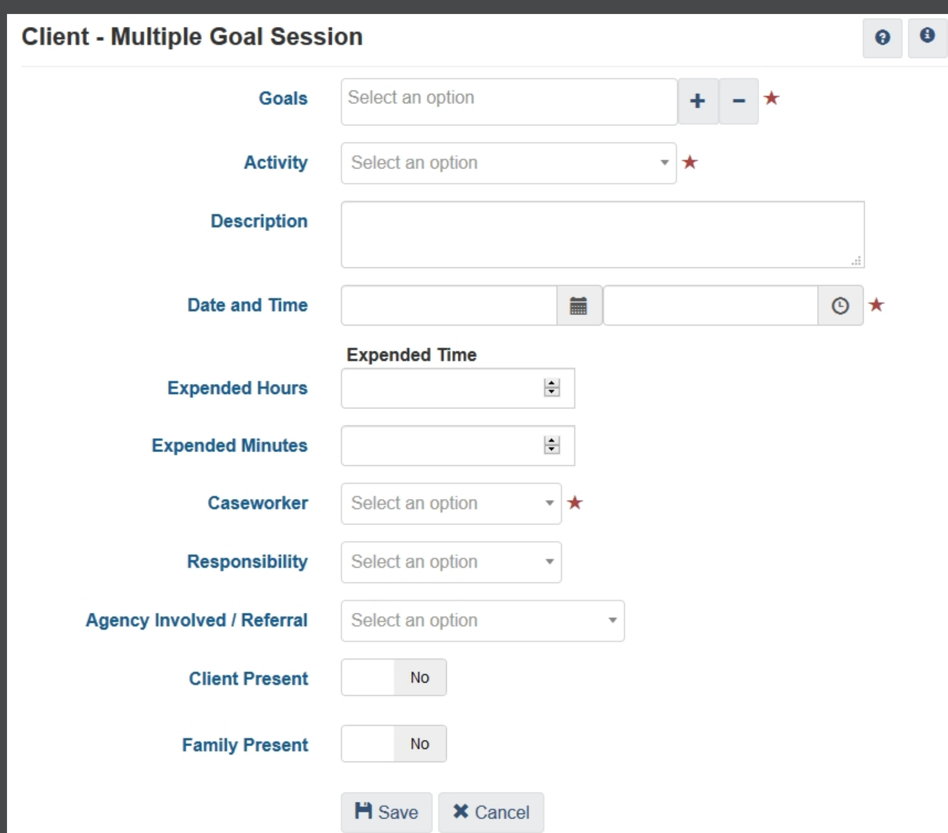
1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **CASE MANAGEMENT**

Now you're on the Client - Case Management List (on page 8)

Add a Case Session

1. Click on the **CLIENT - MULTIPLE GOAL SESSION** button

You're now on the **Client - Multiple Goal Session** screen



2. Select the Goals that this Session was working towards.
3. Select an Activity to reflect what occurred during this Session.
4. Enter a Description.
5. Verify the Date and Time of this Session. The default value is the current date and time, but this can be changed if needed.
6. Enter the duration of this Session in Hours and Minutes.
7. Select the name of the Caseworker who met with the Client this Session.
8. Select whose Responsibility it is to follow-up on the Session.
9. Select if there was an outside Agency involved in this Session.
10. Indicate whether the Client was present.
11. Indicate whether the client's Family was present.
12. Click the **SAVE** button.

You're now on the **Client - Case Management List** screen

How To: Display a Session

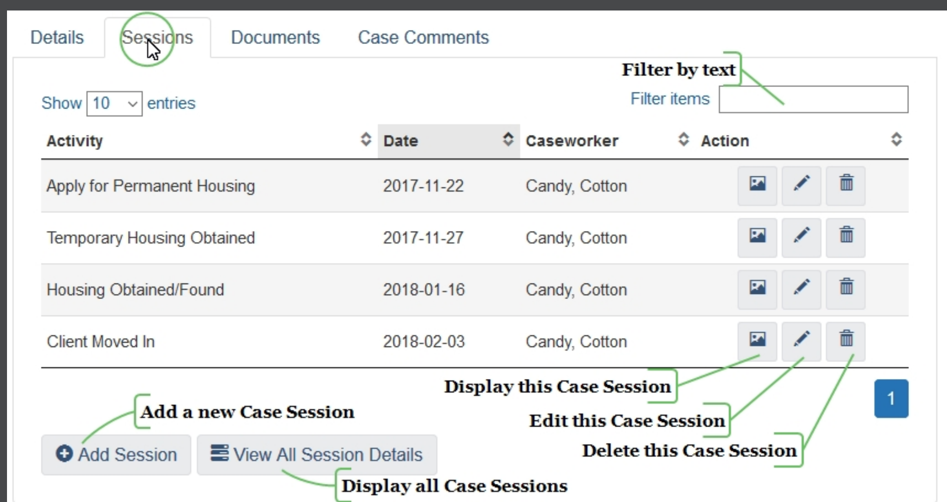
Edit a Case

See Edit a Case (on page 12)

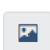
Go to the Sessions Tab

1. Click on the **SESSIONS** tab

You're now on the **Sessions** tab



Display

1. Click on  for the record you would like to display

Now you're on the **Display** Screen

How To: Display All Sessions for this Case

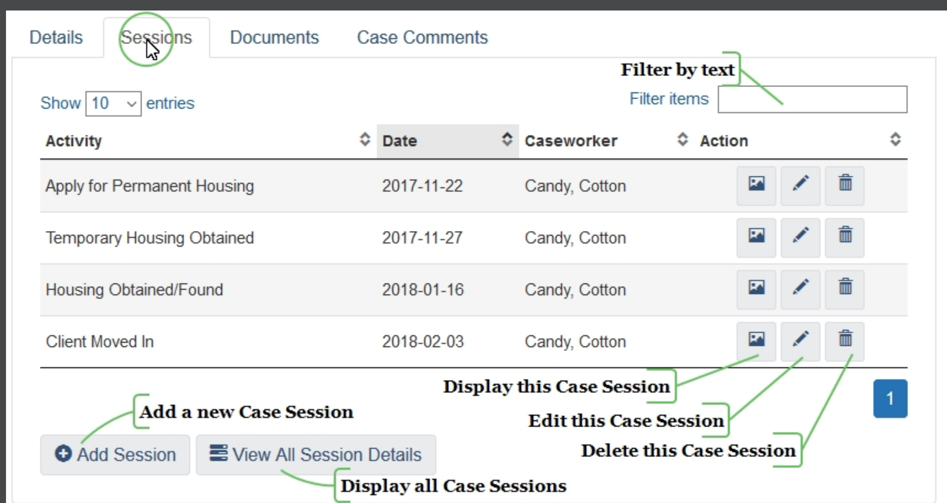
Edit a Case

See Edit a Case (on page 12)

Go to the Sessions Tab

1. Click on the **SESSIONS** tab

You're now on the **Sessions** tab



Display

1. Click on the **VIEW ALL SESSION DETAILS** button

Now you're on the **Sessions** Screen

Sessions - Wonderland, Alice

Goal	Housing Placement
Caseworker	Candy, Cotton
Service Provider	Demo Organization
Status	Open
Factor	Housing - Loss of
Family	N/A
Start Date and Time	2017-11-22
Target Date	N/A
End Date and Time	2018-08-16
Total Elapsed Time	05: 30 Hrs
Total Expended Time	267 Days

Sessions

Activity	Description	Date	Expended Time	Service Provider	Caseworker	Responsibility	Agency Involved / Referral	Client Present	Family Present
Apply for Permanent Housing	Completed application for social housing registry	2017-11-22	0 Expended Hours, 30 Expended Minutes	Demo Organization	Candy, Cotton		Housing Services	Yes	No
Temporary Housing Obtained	Client is moving in with cousin temporarily.	2017-11-27	2 Expended Hours, 0 Expended Minutes	Demo Organization	Candy, Cotton	Client		Yes	No
Housing Obtained/Found	Social housing became available.	2018-01-16	0 Expended Hours, 0 Expended Minutes	Demo Organization	Candy, Cotton	Client	Housing Services	No	No
Client Moved In		2018-02-03	3 Expended Hours, 0 Expended Minutes	Demo Organization	Candy, Cotton	Client		Yes	Yes

✖ Cancel

How To: Edit a Session

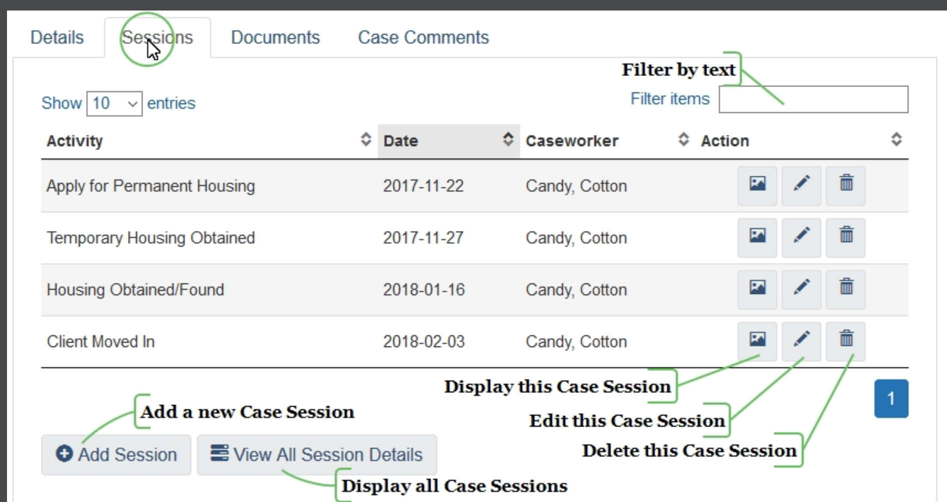
Edit a Case

See Edit a Case (on page 12)

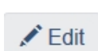
Go to the Sessions Tab

1. Click on the **SESSIONS** tab

You're now on the **Sessions** tab



Edit a Record

1. Click on  or 

for the record you would like to edit

Now you're on the **Edit** Screen

How To: Add a Session Appointment

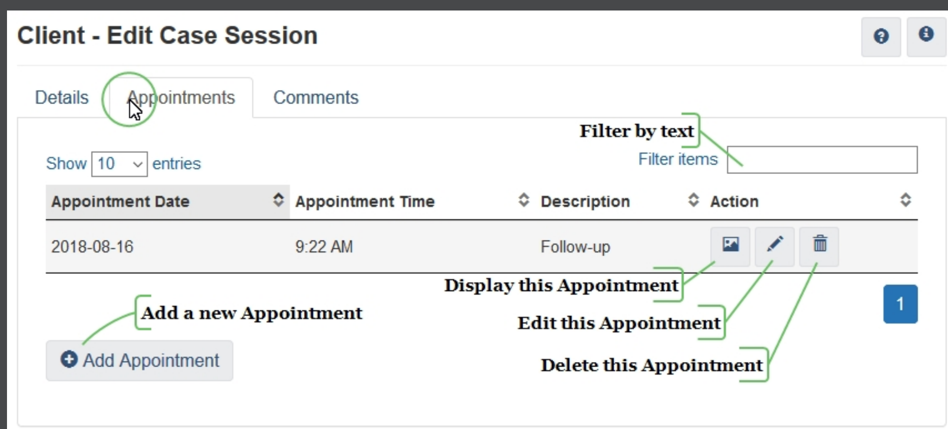
Edit a Session

See Edit a Session (on the previous page)

Go to the Session Appointments Tab

1. Click on the **APPOINTMENTS** tab

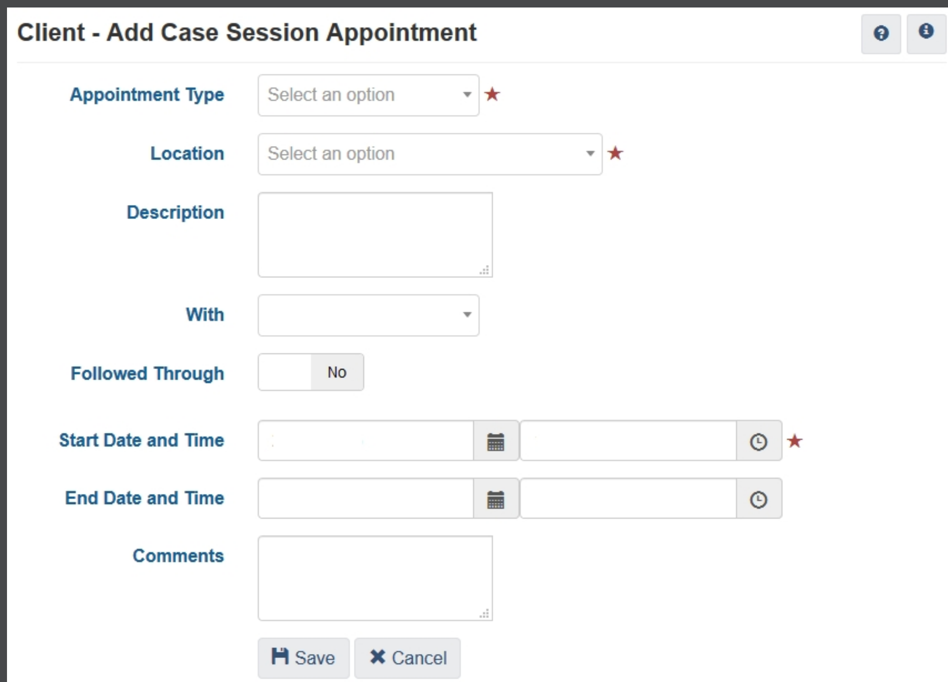
You're now on the **Appointments** tab



Add a Case Session Appointment

1. Click on the **ADD APPOINTMENT** button.

Now you're on the **Client - Add Case Session Appointment** Screen



2. Select the Type of the Appointment.
3. Select the Location of the Appointment.
4. Enter a brief Description of the Appointment.
5. Select who the Appointment is With.
6. Indicate whether the Client Followed Through on the Appointment.
7. Verify the Start Date and Time of the Appointment. The default value is the current date and time, but this can be changed if needed.
8. Verify the End Date and Time of the Appointment. The default value is two hours in the future from the current date and time, but this can be changed if needed.
9. Enter some additional Comments about the Appointment.
10. Click on the **SAVE** button.

Now you're on the **Client - Edit Case Session** screen on the **Appointments** tab

How To: Add Notes to an Existing Session

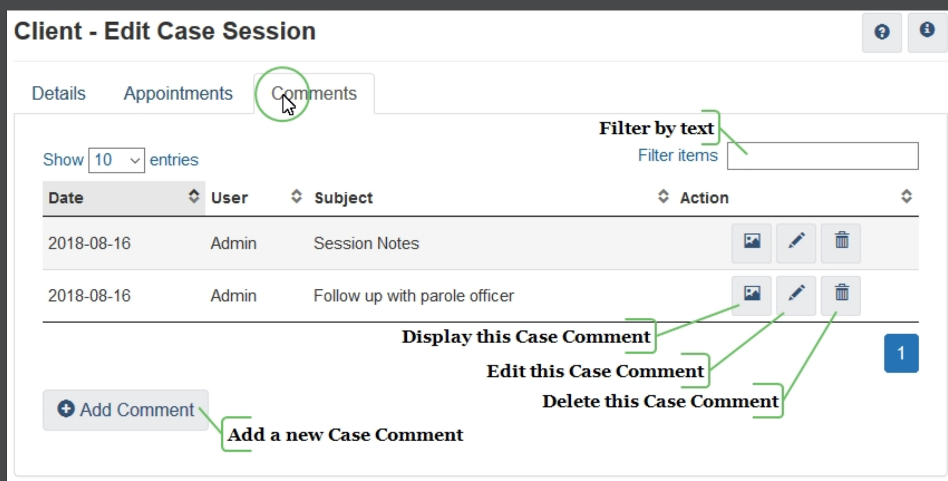
Edit a Session

See Edit a Session (on page 22)

Go to the Session Comments Tab

1. Click on the **COMMENTS** tab

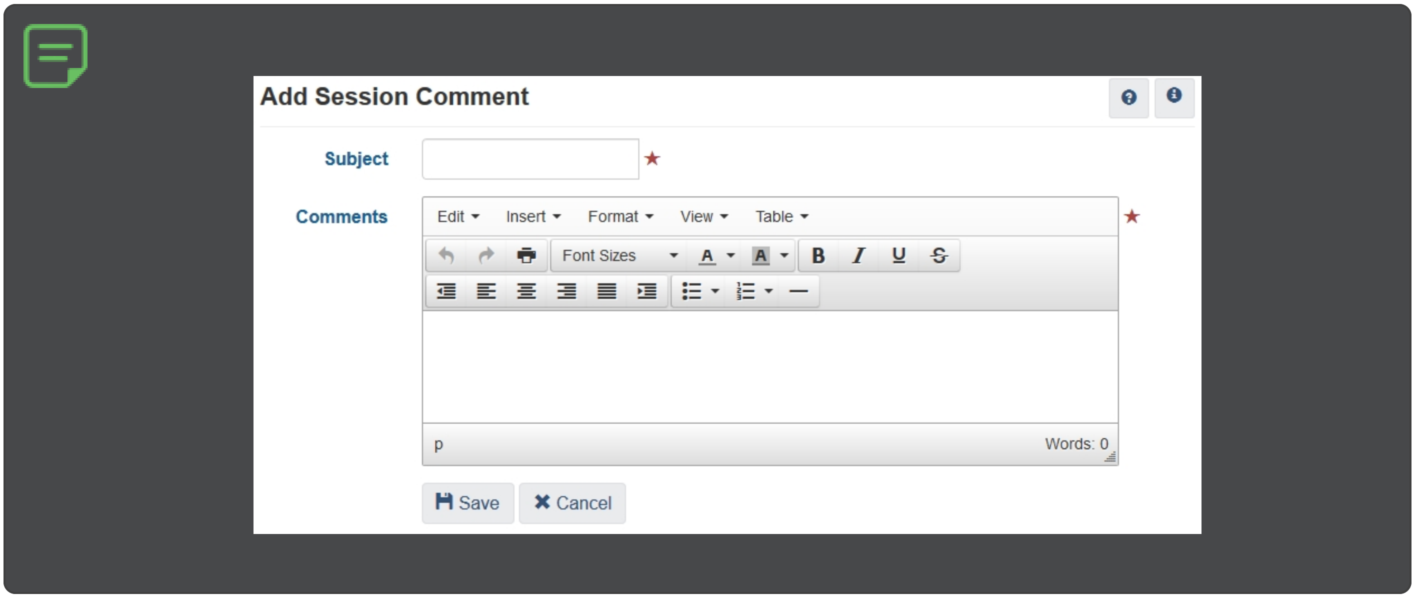
You're now on the **Comments** tab



Add a Session Comment

1. Click on **ADD COMMENT**.

Now you're on the **Add Session Comment** screen



2. Enter the Subject.
3. Enter some Comments.
4. Click the **SAVE** button.

How To: Add Notes to an Existing Case

Edit a Case

See Edit a Case (on page 12)

Go to the Case Comments Tab

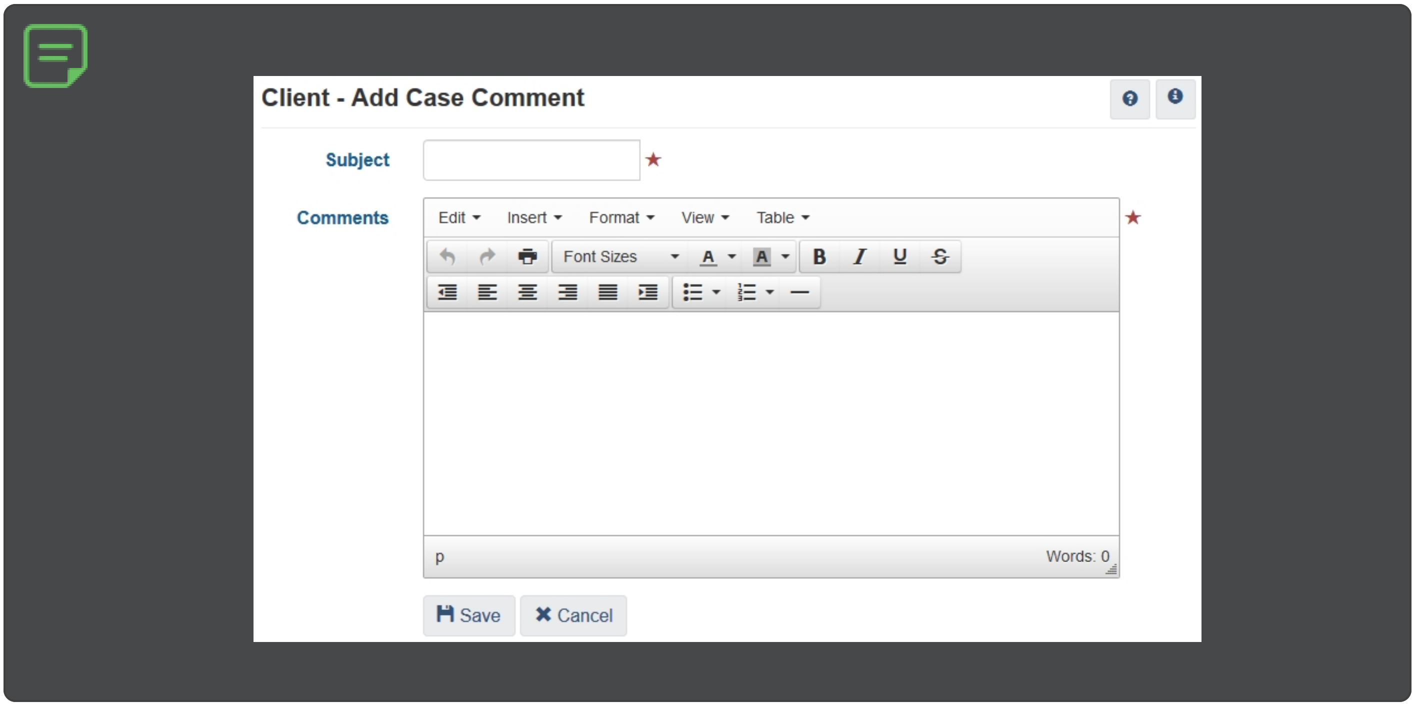
1. Click on the **CASE COMMENTS** tab

You're now on the **Case Comments** tab

Add Comment

1. Click on **ADD COMMENT**.

Now you're on the **Client - Add Case Comment** screen



2. Enter the Subject.
3. Enter some Comments.
4. Click the **SAVE** button.

How To: Add a Document to an Existing Case

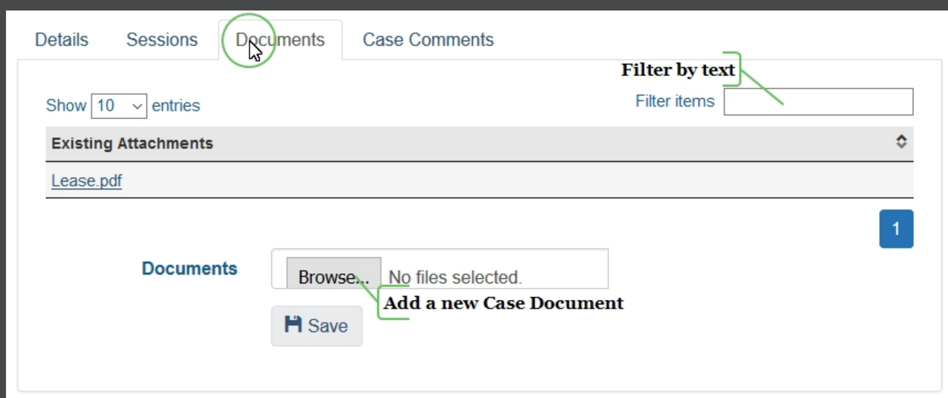
Edit a Case

See Edit a Case (on page 12)

Go to the Documents Tab

1. Click on the **DOCUMENTS** tab

You're now on the **Documents** tab



Add Document

1. Click **BROWSE...**.
   a. In the File Upload window, navigate to and select the file you wish to upload from your computer.
   b. Click **OPEN**. The File Upload window will close and your file name will be listed in the Documents field.
2. Click the **SAVE** button.

Now you're on the **Client - Document List** screen

CHAPTER 3: Goods and Services

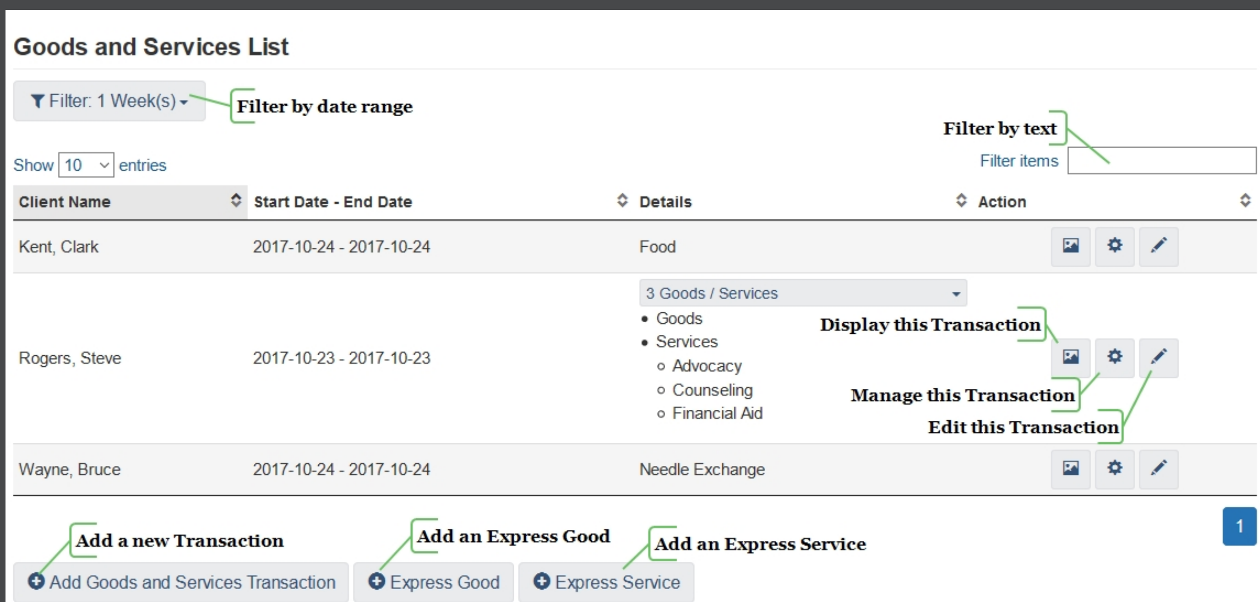
Chapter Contents

How To: Add an Express Good

Go to the Goods and Services List

1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

Now you're on the **Goods and Services List**

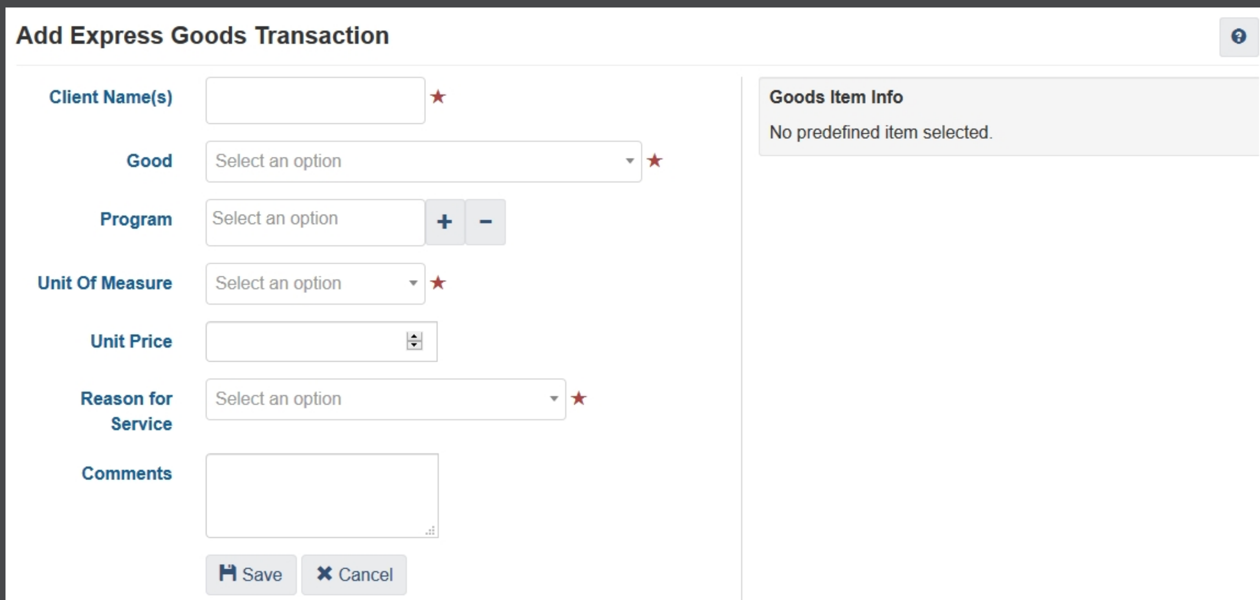


You can also Open a Client File (on page 1) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Add an Express Good

1. Click on the **EXPRESS GOOD** button.

Now you're on the **Add Express Goods Transaction** Screen



2. Enter the Client's name. If you arrived at this screen from the **Client - Goods and Services** List, the client has already been selected.
3. Select the Good from the drop-down list
4. Select the Program(s) this Good is associated with.
5. Select the Unit of Measure for this Good
6. Select the Unit Price (price per unit) for this Good
7. Select the Reason for Service from the drop-down list.
8. Record some comments about this Good
9. Click **SAVE** when done, or **CANCEL** to go back

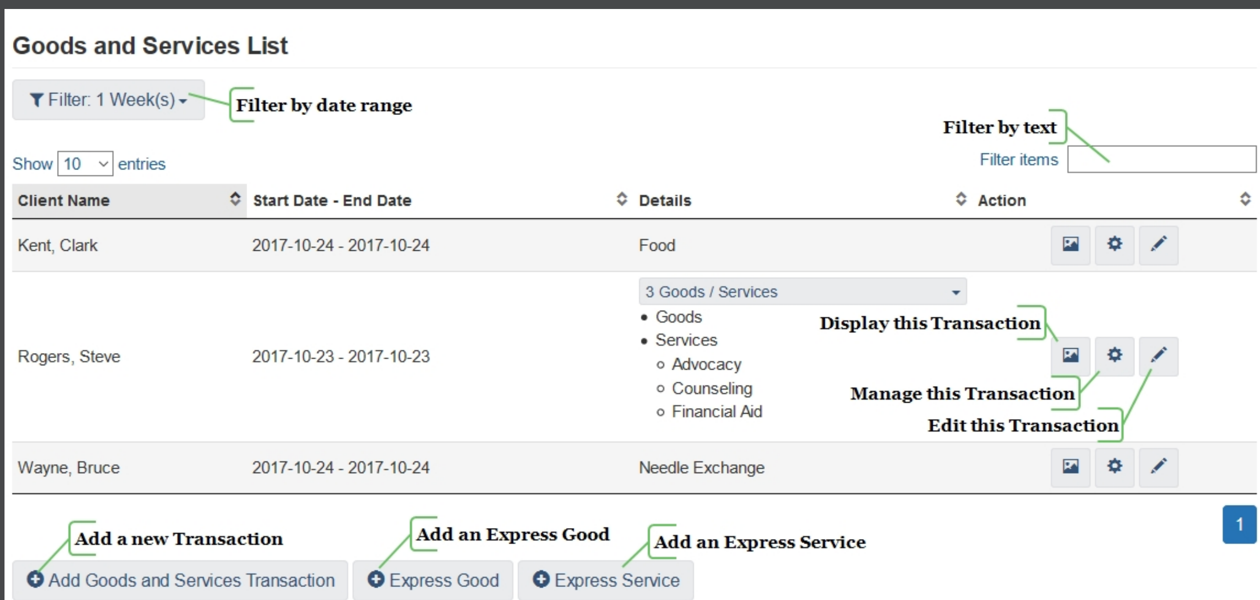
Now you're on the **Goods and Services List**

How To: Add an Express Service

Go to the Goods and Services List

1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

Now you're on the **Goods and Services List**

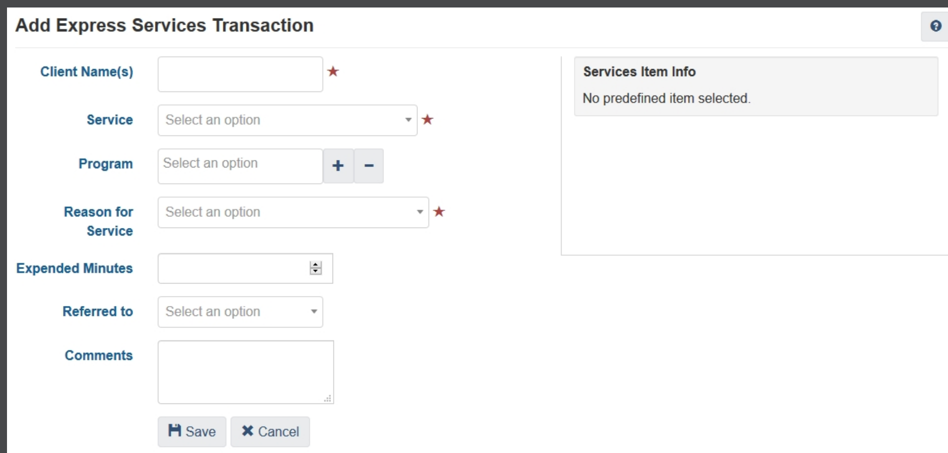


You can also Open a Client File (on page 1) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Add an Express Service

1. Click on the **EXPRESS SERVICE** button.

Now you're on the **Add Express Services Transaction** Screen



2. Enter the Client's name. If you arrived at this screen from the Client - Goods and Services List, the client has already been selected.
3. Select the Service from the drop-down list
4. Select the Program(s) this Service is associated with.
5. Select the Reason for Service from the drop-down list
6. Enter how much time, in minutes, it took you to provide this Service
7. Select a place that you Referred the client To as a result of this Service
8. Record some comments about this Service
9. Click **SAVE** when done, or **CANCEL** to go back

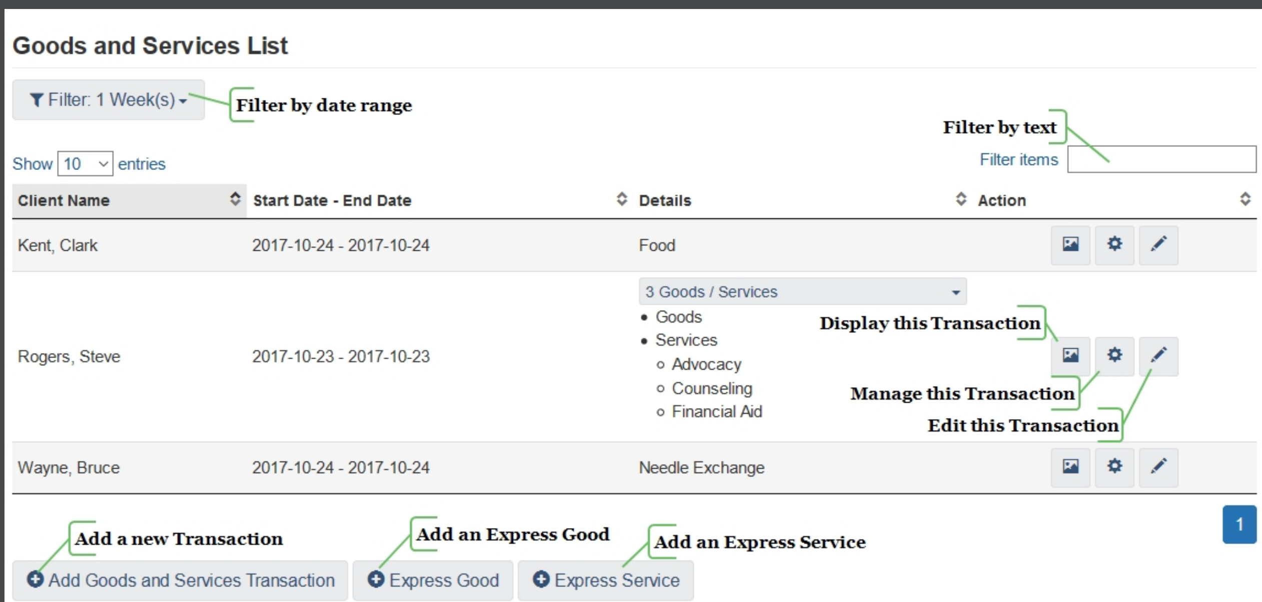
Now you're on the **Goods and Services List**

How To: Add a Goods and Services Transaction

Go to the Goods and Services List

1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

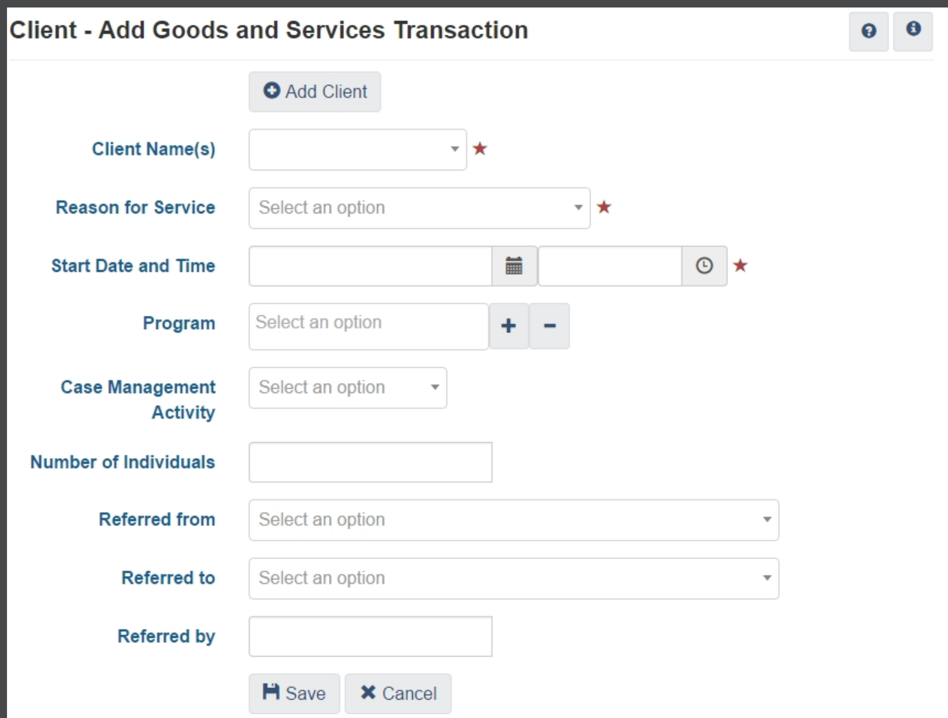
Now you're on the **Goods and Services List**



Add a Goods and Services Transaction

1. Click on the **ADD GOODS AND SERVICES TRANSACTION** button.

Now you're on the **Client - Add Goods and Services Transaction** Screen



2. Enter the Client's name. If you arrived at this screen from the Client Goods and Services List, the client has already been selected.
3. Select the Reason for Service from the drop-down list.
4. Verify the Start Date and Time. The default value is the current date and time.
5. Select the Program this Goods and Services Transaction is associated with.
6. Select the Case Management Activity this Goods and Services Transaction is associated with.
7. Enter the number of individuals being served by this Goods and Services Transaction.
8. Select the location the Client was Referred From.
9. Select the location the Client is Referred To
10. Enter the name of the person who referred the Client to you
11. Click **SAVE** when done, or **CANCEL** to go back

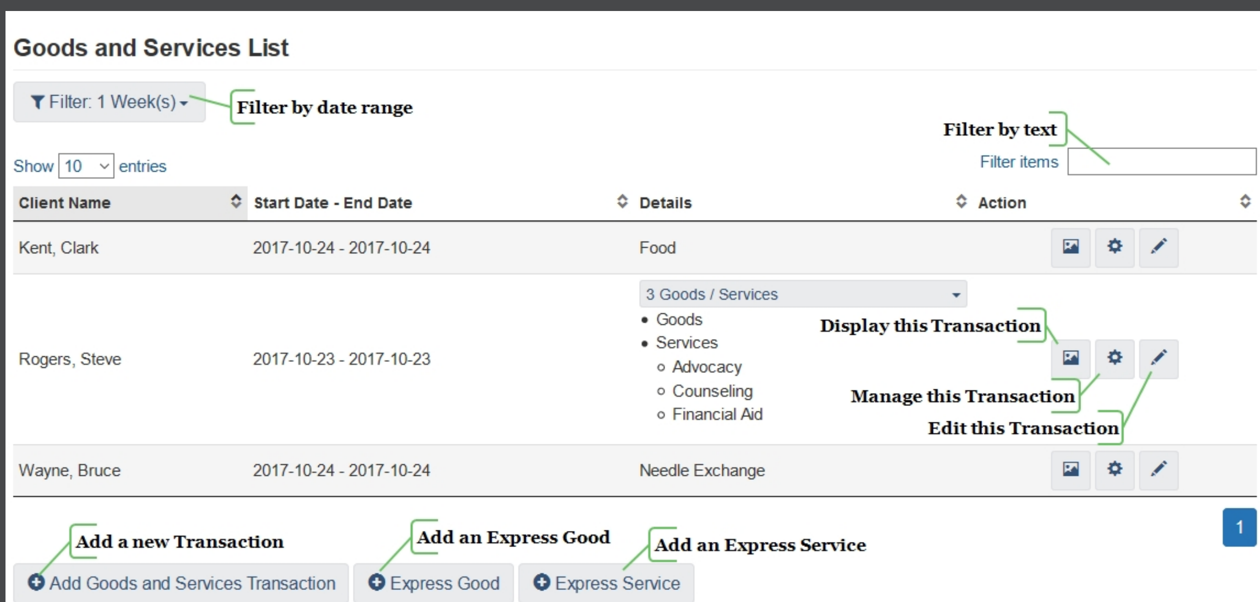
Now you're on the **Edit Goods and Services Transaction** Screen

How To: Manage an existing Goods and Services Transaction

Go to the Goods and Services List

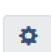
1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

Now you're on the **Goods and Services List**



You can also Open a Client File (on page 1) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Manage a Record

1. Click on  for the record you would like to manage

Now you're on the **Manage** Screen

How To: Add a Good to an Existing Goods and Services Transaction

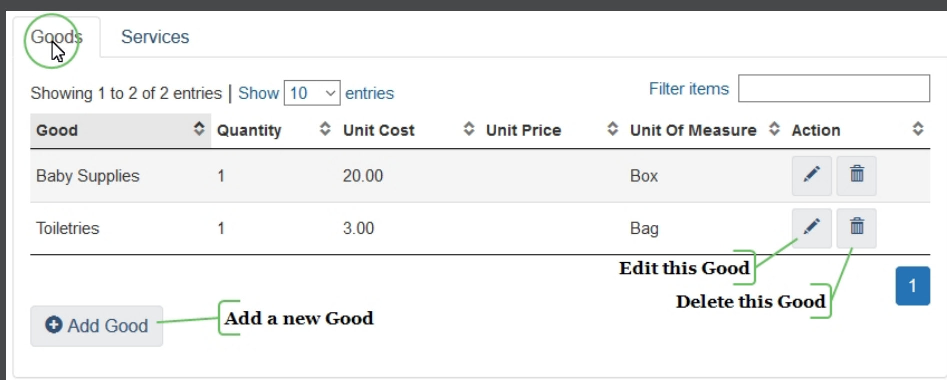
Manage a Goods and Services Transaction

See Manage an existing Goods and Services Transaction (on the previous page).

Go to Goods Tab

1. Click on the **GOODS** tab

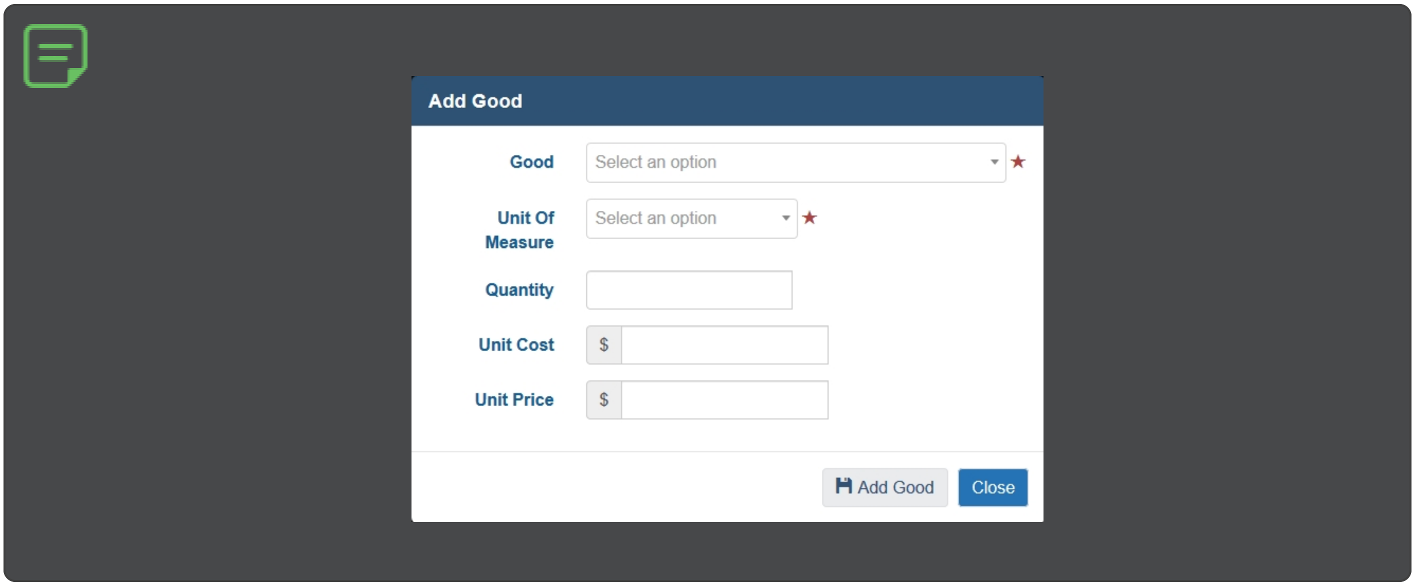
Now you're on the **Goods** Tab



Add a Good

1. Click on the **ADD GOOD** button

The **Add Good** pop-up will display



2. Select the Good from the drop-down list
3. Select the Unit of Measure
4. Optionally, enter the Quantity of Goods provided
5. Optionally, you may enter the Cost of this Good
6. Optionally, you may enter the Price of this Good
7. Click **SAVE** when done

How To: Add a Service to an Existing Goods and Services Transaction

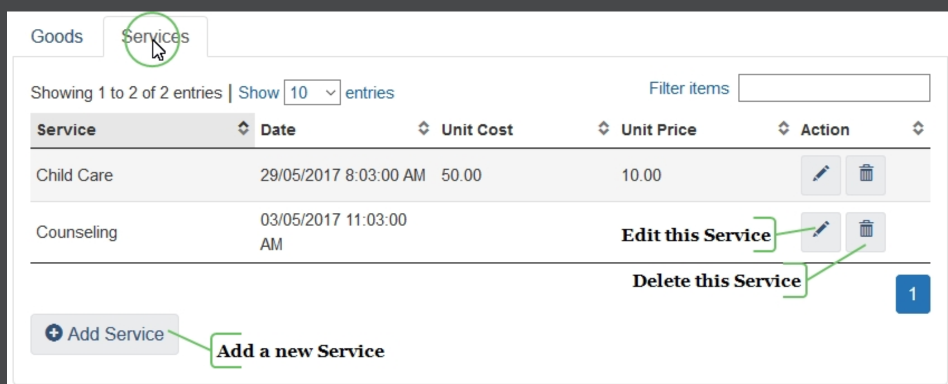
Manage a Goods and Services Transaction

See Manage an existing Goods and Services Transaction (on page 37).

Go to Services Tab

1. Click on the **SERVICES** tab

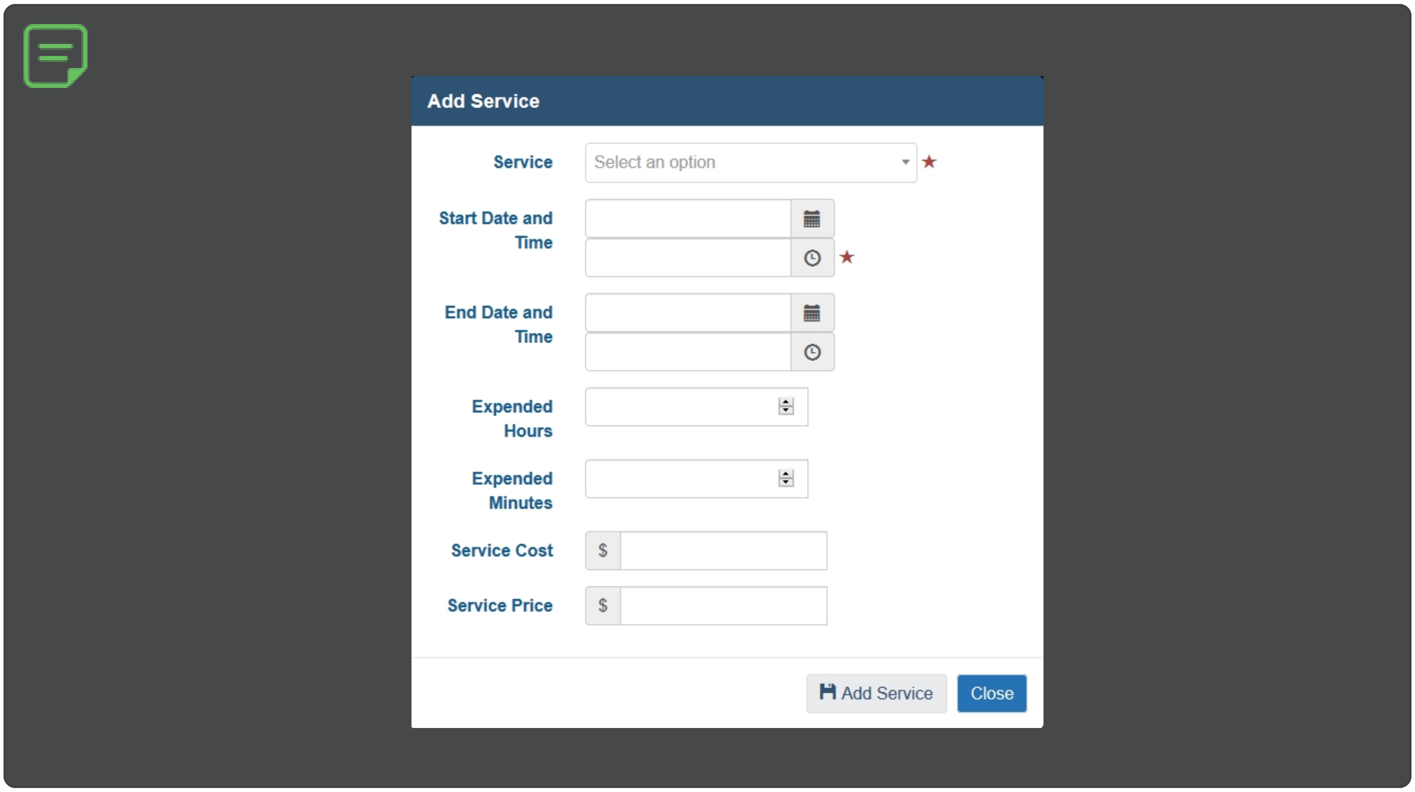
Now you're on the **Services** Tab



Add a Service

1. Click on the **ADD SERVICE** button

The **Add Service** pop-up will display



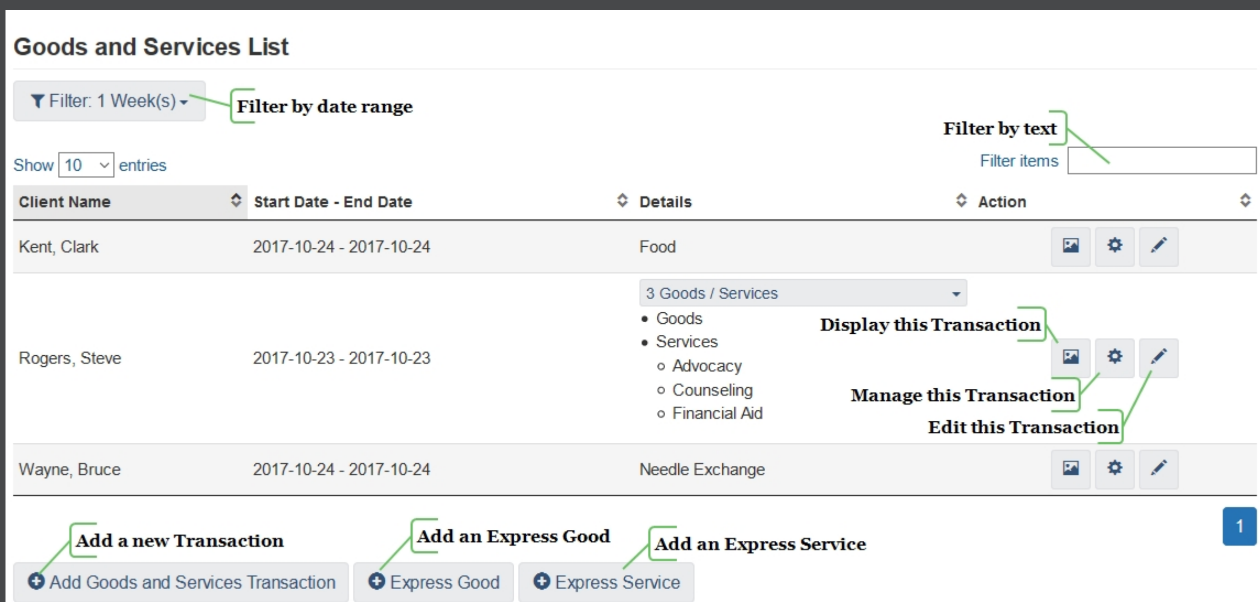
2. Select the Service from the drop-down list
3. Ensure that the Start Date and Time are correct
4. Optionally, enter an End Date and Time
5. Optionally, you may enter the expended amount of time that was spent delivering this Service
6. Optionally, you may enter the Cost of this Service
7. Optionally, you may enter the Price of this Service
8. Click **SAVE** when done

How To: Close a Goods and Services Transaction

Go to the Goods and Services List

1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

Now you're on the **Goods and Services List**



You can also Open a Client File (on page 1) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Edit a Record

1. Click on  or 

for the record you would like to edit

Now you're on the **Edit** Screen

Add an End Date

1. Add a value to the End Date field
2. Click **SAVE** when done

Now you're on the **Display Goods and Services** Screen

CHAPTER 4: Housing Placements

Chapter Contents

Understanding Housing Placements in HIFIS 4

A Housing Placement in HIFIS 4 is a type of **service record** that indicates that a **Client** is working with a **Caseworker** during a particular **date range** to **find, secure, and retain a particular housing unit**.

A Housing Placement record in HIFIS 4 is very similar to a Housing Loss Prevention record, but a Housing Loss Prevention record excludes the housing search and move-in process.

The Housing Placement module is the logical place to store information regarded to a client's housing search and move-in process. Features of the Housing Placement module include:

- Opening a Housing Placement to store a related series of information about activities with a Client
- Assigning a Caseworker to the Client
- Including other family members in the Housing Placement
- Selecting the types of housing that the Caseworker and the Client are seeking
- Setting a target date for securing housing
- Tracking the status of the Case File
- Recording unsuccessful Attempts to secure housing
- Recording the secured housing and date on which housing was secured
- Recording the client's expected move-in date and actual move-in date
- Following up after move-in to check if the Client is still housed
- Recording the rent the Client is paying and any Housing Subsidies they are receiving
- Attaching files (Documents) to this Housing Placement
- Custom Table support

Example: Housing First in Practice

Imagine that Jasmine the Caseworker has been assigned to the client Aladdin, who is homeless. Jasmine is a Housing First Caseworker and her top priority is to help Aladdin find appropriate housing. She sits down and meets with Aladdin, and they go through Aladdin's financials. Together, they decide that Aladdin could afford to pay $500 per month in rent. Aladdin also expresses that he does not want to have a roommate since he already has a pet, and he and Jasmine talk about suitable housing options.

Jasmine creates a Housing Placement and specifies the types of housing that Aladdin is looking for, including Rental at Market Price. She thinks he would be eligible for some programs that would supplement his rent, so she adds Rental at Market Price with Subsidy. She indicates that this Housing Placement is part of the "Housing First" Program.

Next, Jasmine conducts a Housing Unit search to find a list of suitable housing options that meet Aladdin's criteria (at least on paper), that are part of the Housing Unit Inventory her colleague is tasked with maintaining. Together, they go visit some of these units, but none of them pan out. A few of the landlords don't want pets in the building, and some others are too far away that transportation would be an issue for Aladdin. Jasmine records some Housing Placement Attempts, noting what happened and why each unit didn't pan out.

After several attempts, Aladdin and Jasmine talk about his expectations. Turns out, Aladdin probably won't be doing much cooking so Jasmine suggests that a Single Room Occupancy type of housing might be appropriate, and cheaper too. Aladdin agrees. Jasmine modifies Aladdin's housing unit criteria in the Housing Placement and searches again for more Housing Units in the inventory, but they're still not able to find a housing match.

Finally, Aladdin finds out that his cousin's neighbour, Kassim, has a room for rent. Jasmine and Aladdin go to check it out and Aladdin and Kassim agree to an arrangement, but it's more than Aladdin would have liked. While they don't sign a formal lease agreement, Jasmine insists that something official is in place so Aladdin doesn't get taken advantage of later. She provides a simple agreement, and writes in the rent amount of $550, and Aladdin and Kassim both sign it.

In the Housing Placement, Jasmine Adds and Secures a Housing Unit, indicating that Aladdin is moving in to a unit that is not part of the Housing Unit Inventory. She indicates that Aladdin is expected to move in next Monday. She also scans and uploads a copy of the agreement Aladdin and Kassim signed.

On Monday, Aladdin moves in as planned. Jasmine also indicates that the Housing Placement status is now Moved In. She also schedules a Follow-up for Wednesday.

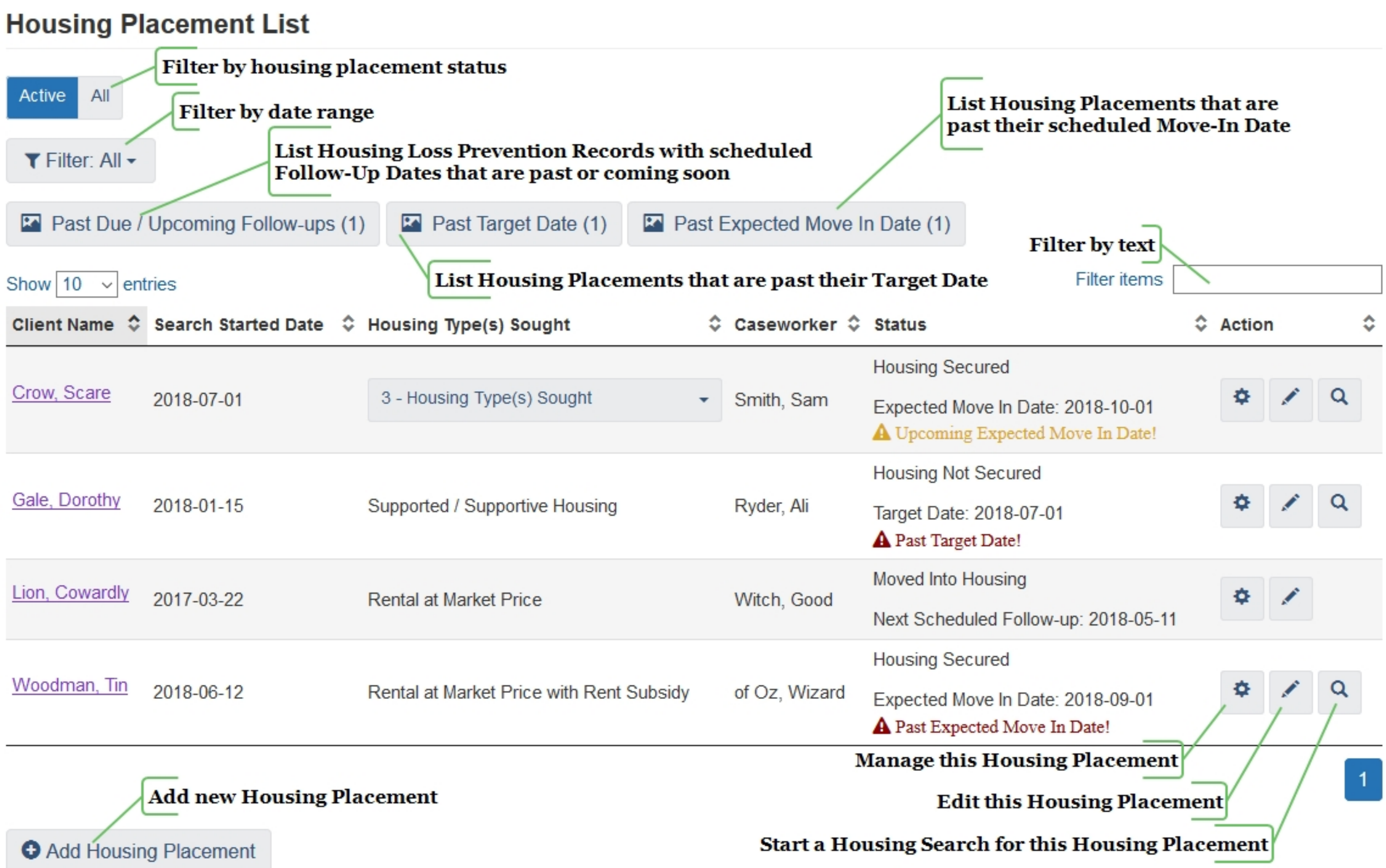
Because Aladdin is paying more than he can afford for rent, Jasmine helps him to access a special local fund to make his housing more affordable. She enters in the Housing Placement that Aladdin is now receiving a Housing Subsidy in the amount of $50/month from the "Housing First Flex Fund" Program.

On Wednesday, Jasmine returns to Aladdin's unit and checks in on things. There are some challenges, but Jasmine and Aladdin work through them together. Jasmine enters a Follow-up in the Housing Placement to indicate that Aladdin is still housed, and records some notes. She then schedules her next Follow-up.

Jasmine can continue with this process of conducting a Follow-up and scheduling the next one until either Aladdin leaves that housing unit, or until Jasmine is no longer working to support Aladdin in his housing. In either of these cases, she would conduct a Final Follow-up to close the Housing Placement.

Housing Placement List

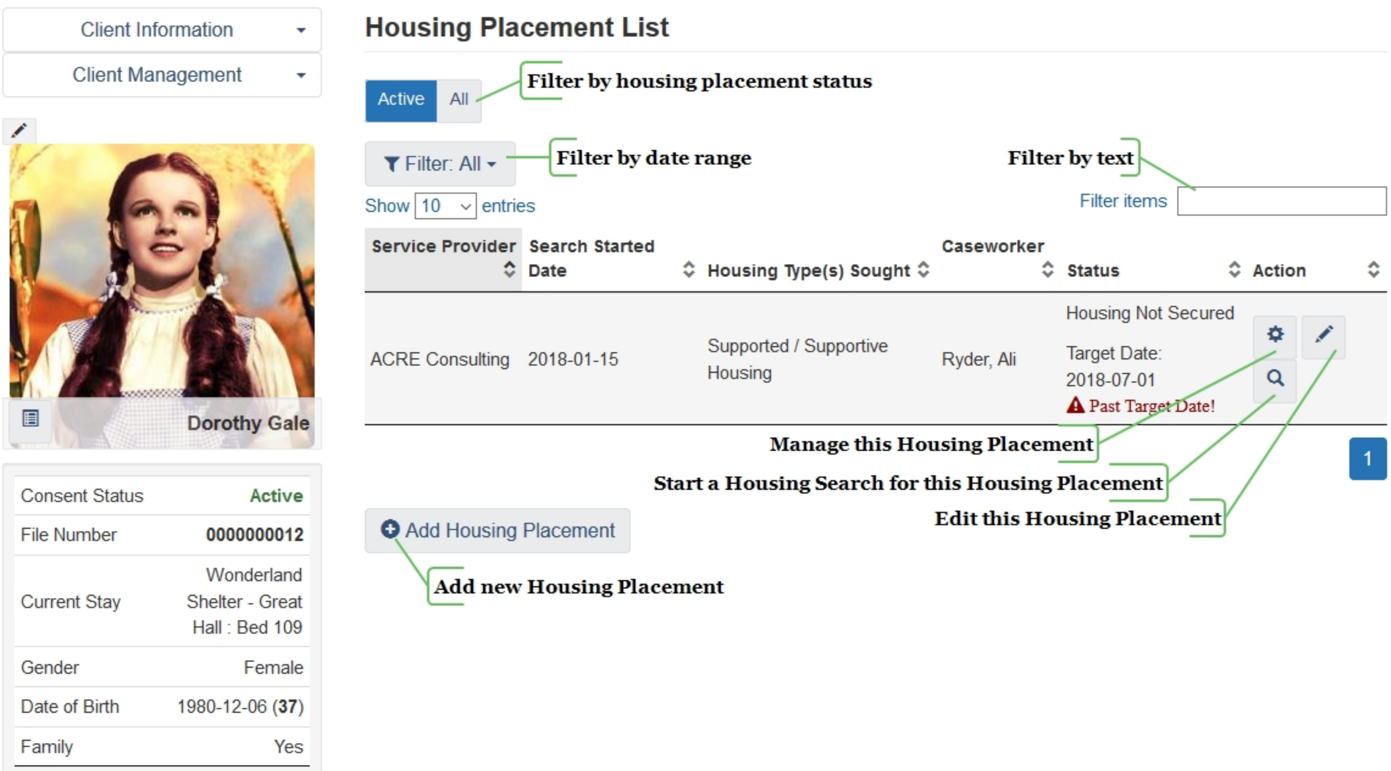
The **Housing Placement List** is reached via the Front Desk Menu by clicking on **HOUSING ▶ HOUSING PLACEMENT**. This page shows a list of all Housing Placements opened by the active Service Provider, which can be filtered to only show a sub-section of all Housing Placements.



Client - Housing Placement List

The **Client - Housing Placement List** is reached via the Client Management Menu by clicking on Housing Placement. This page shows a list of all Housing Placements belonging to the active Client, which can be filtered to only show a sub-section of all Housing Placements.

The Client - Housing Placement List shows all Housing Placements belonging to the active Client, including ones opened by other Service Providers. Therefore, the information on this page (Caseworker, Service Provider, Goal, Status, and Target Date) are shared with Users at other Service Providers. However Users can only Manage or Edit Housing Placements that have been opened by Service Providers that the User has been granted appropriate Rights to.



How To: Add a Housing Placement

Go to the Housing Placement List

1. Click on the **FRONT DESK MENU**
2. Click on **HOUSING**
3. Click on **HOUSING PLACEMENTS**

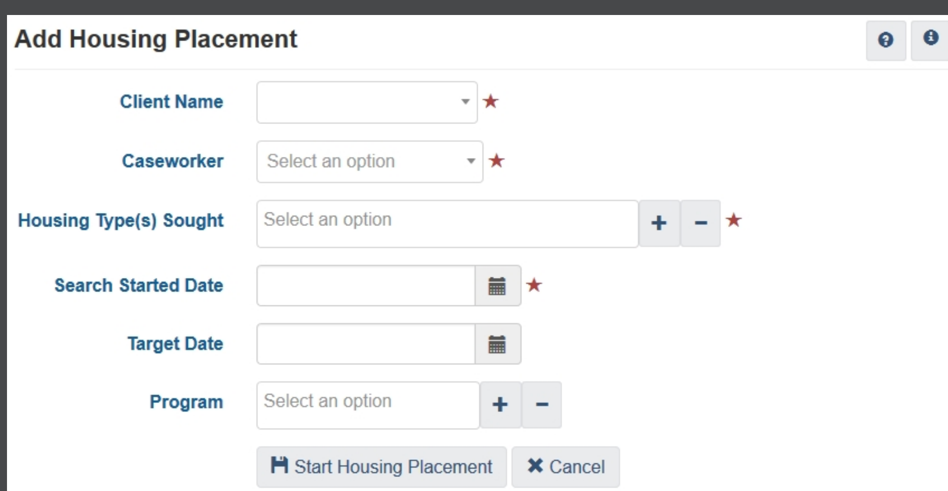
Now you're on the Housing Placement List (on page 48)

Take note of the Clients who already have active Housing Placements. Try to pick a different client in the next step.

Add Housing Placement

1. Click on the **ADD HOUSING PLACEMENT** button

Now you're on the **Add Housing Placement** Screen



2. Select a client. Note: if you arrived at this page from the **Client - Housing Placements** list, the client has already been selected.

Make sure the client does not have any existing, active Housing Placements. Otherwise, you'll get an error later. Clients can only have one active Housing Placement at a time. If they do have an existing Housing Placement, open a new client file (see Open a Client File (on page 1)), add a new client (see Add a Client (on page 1)), or close the existing Housing Placement first (see Follow Up and Close File (on page 70)).

3. Select the caseworker working with this client to find housing.
4. Select the Housing Type(s) that the client is searching for
5. Enter the date that the client started searching for housing
6. Enter a Target Date that the client aims to have housing by
7. Select a Program(s) for this housing placement
8. Click on the **START HOUSING PLACEMENT** button

Now you're on the **Housing Placement Details** screen with the Housing Placement Status of Housing Not Secured.

How To: Manage a Housing Placement

Go to the Housing Placement List

1. Click on the **FRONT DESK MENU**
2. Click on **HOUSING**
3. Click on **HOUSING PLACEMENTS**

Now you're on the Housing Placement List (on page 48)

Manage a Record

1. Click on ⚙ for the record you would like to manage

Now you're on the **Manage** Screen

How To: Add an Unsuccessful Housing Placement Attempt to an Existing Housing Placement

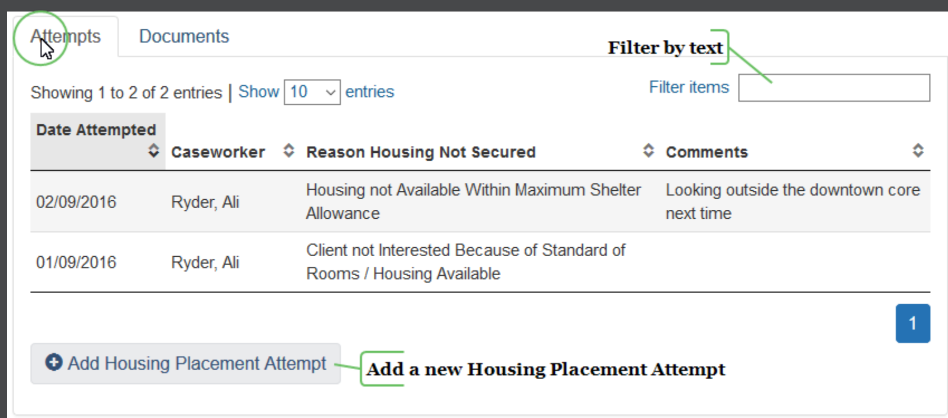
Manage a Housing Placement

See Manage a Housing Placement (on the previous page)

Go to Attempts Tab

1. Click on the **ATTEMPTS** tab

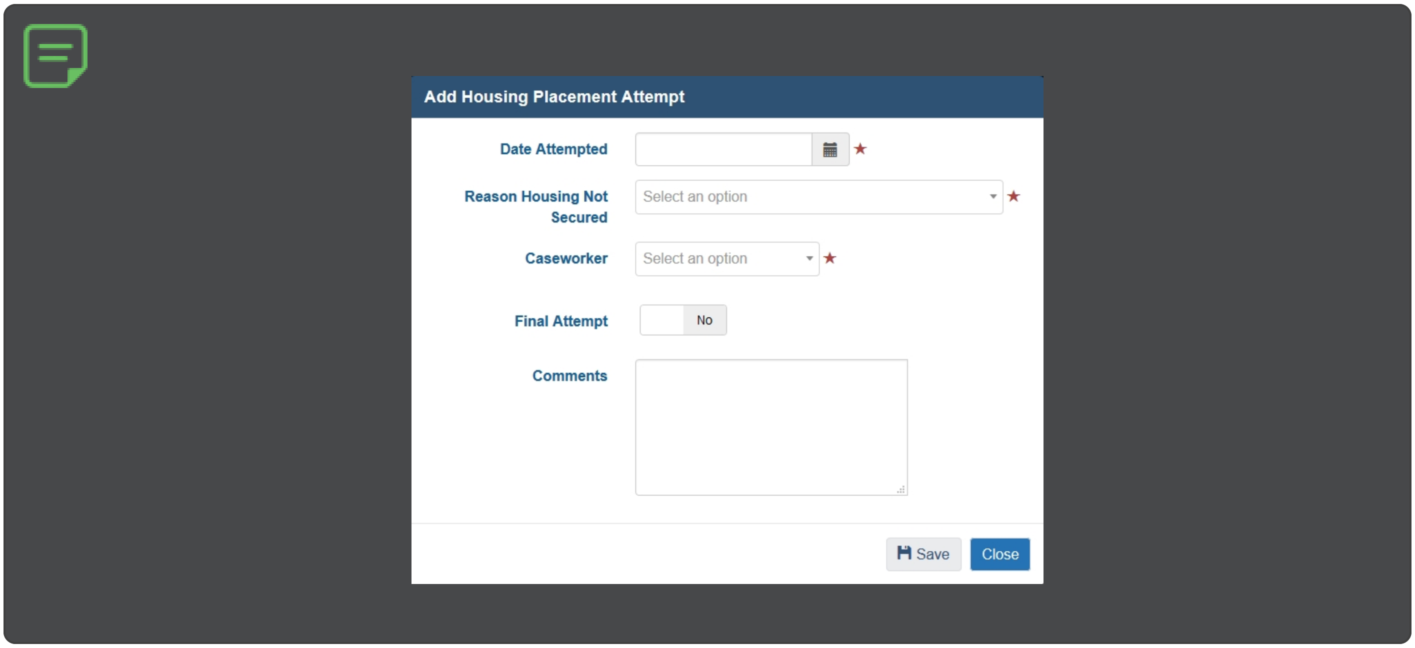
Now you're on the **Attempts** tab



Add Housing Placement Attempt

1. Click on the **ADD HOUSING PLACEMENT ATTEMPT** button

Now you're on **Add Housing Placement Attempt** pop-up



2. Ensure that the Date Attempted is accurate
3. Select the most appropriate Reason that Housing was Not Secured
4. Select the caseworker working with this client on this housing attempt
5. If, as a result of this Housing Placement Attempt, this Housing Placement will be ended, toggle Final Attempt to "Yes." Otherwise, leave it as "No"
6. Optionally, enter Comments
7. Click on the **SAVE** button

How To: Search for an Existing Housing Unit and Record an Unsuccessful Attempt

This function is used to place a Client in a Housing Unit that already exists in the **Housing Unit List**. To place a Client in a new Housing Unit, see Add and Secure Housing for an Existing Housing Placement (on page 57).

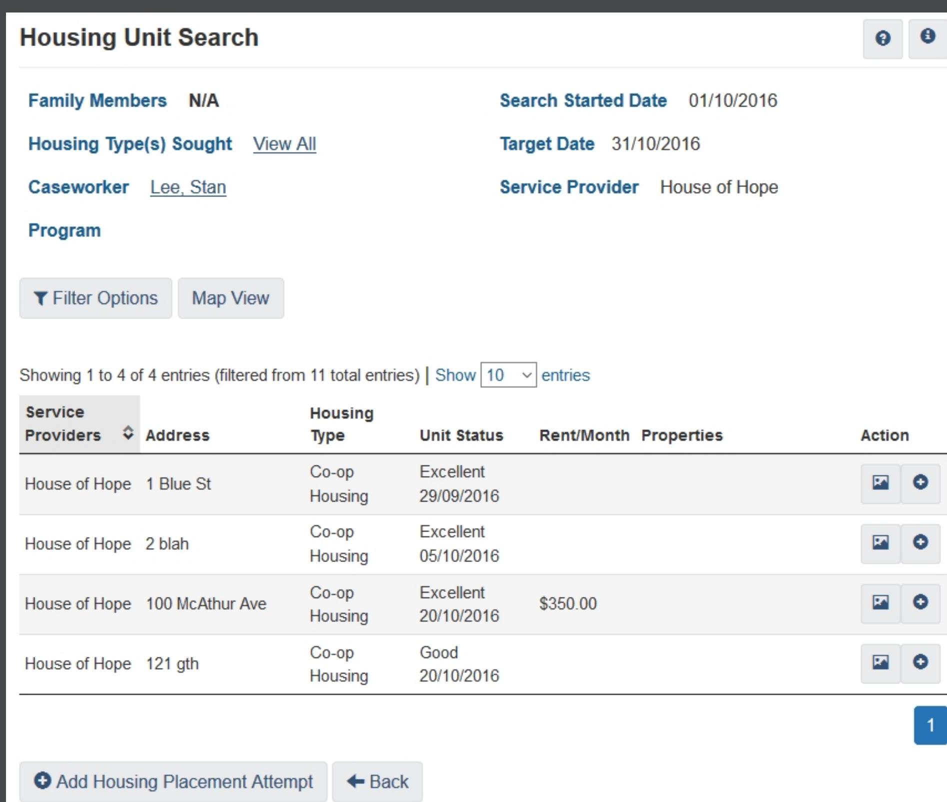
Manage a Housing Placement

See Manage a Housing Placement (on page 52)

Search for Housing

1. Click on the **NEW HOUSING SEARCH** button.

Now you're on Housing Unit Search


Housing Unit Search

Family Members N/A
Housing Type(s) Sought View All
Caseworker Lee, Stan
Program
Search Started Date 01/10/2016
Target Date 31/10/2016
Service Provider House of Hope

Filter Options | Map View

Showing 1 to 4 of 4 entries (filtered from 11 total entries) | Show 10 entries

Service Providers	Address	Housing Type	Unit Status	Rent/Month	Properties	Action
House of Hope	1 Blue St	Co-op Housing	Excellent 29/09/2016			
House of Hope	2 blah	Co-op Housing	Excellent 05/10/2016			
House of Hope	100 McAthur Ave	Co-op Housing	Excellent 20/10/2016	$350.00		
House of Hope	121 gth	Co-op Housing	Good 20/10/2016			

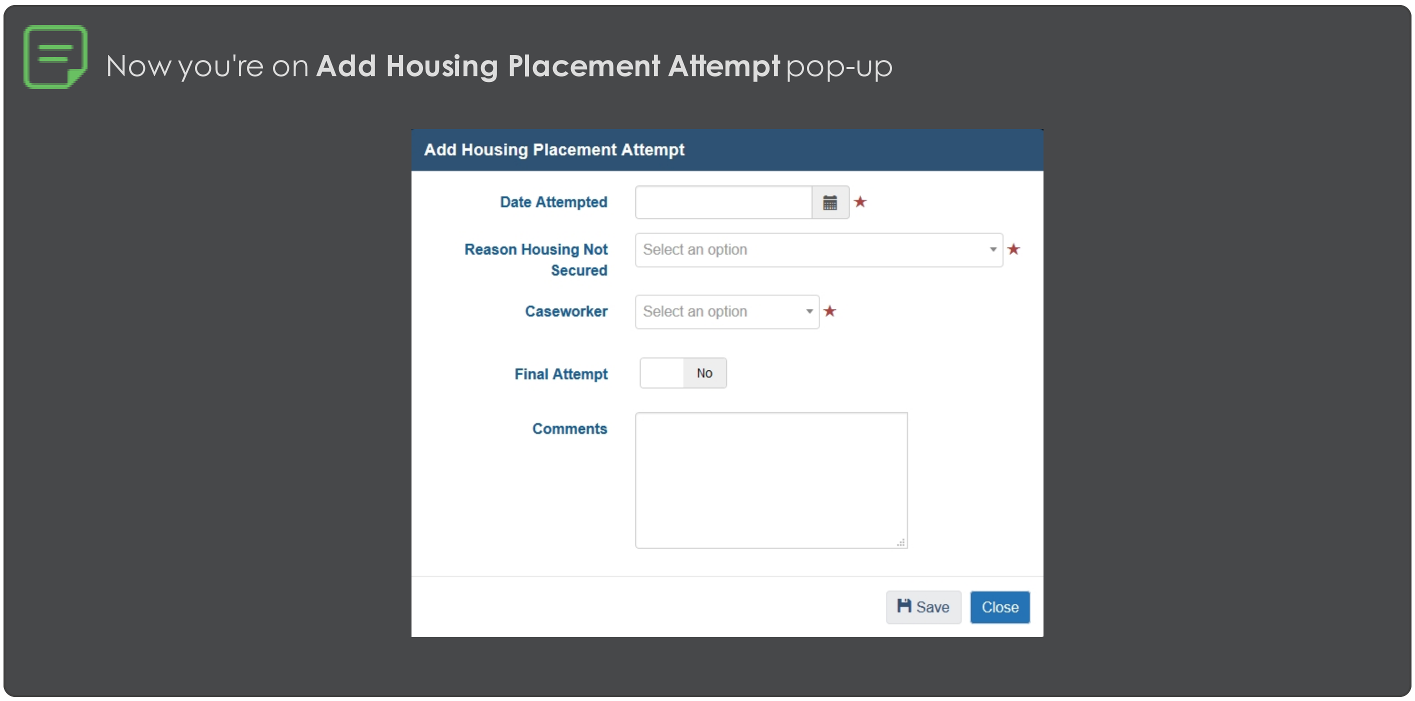
1

Add Housing Placement Attempt | Back

2. There will be a list of Housing Units that match the Housing Type(s) Sought
3. Click on the **FILTER OPTIONS** button to change the housing types displayed
4. In the sidebar that appears, click the Select All button next to Housing Type(s) Sought.
5. Click on the **APPLY FILTERS** button
6. The list of Housing Units should change to reflect the new options

Add Housing Placement Attempt

1. Click on the **ADD HOUSING PLACEMENT ATTEMPT** button



2. Ensure that the Date Attempted is accurate
3. Select the most appropriate Reason that Housing was Not Secured
4. Select the caseworker working with this client on this housing attempt
5. If, as a result of this Housing Placement Attempt, this Housing Placement will be ended, toggle Final Attempt to "Yes." Otherwise, leave it as "No"
6. Optionally, enter Comments
7. Click on the **SAVE** button

How To: Add and Secure Housing for an Existing Housing Placement

This function is used to place a Client in a Housing Unit that does not yet exist in the **Housing Unit List**. To place a Client in an existing Housing Unit, see Search for and Secure an Existing Housing Unit (on page 59).

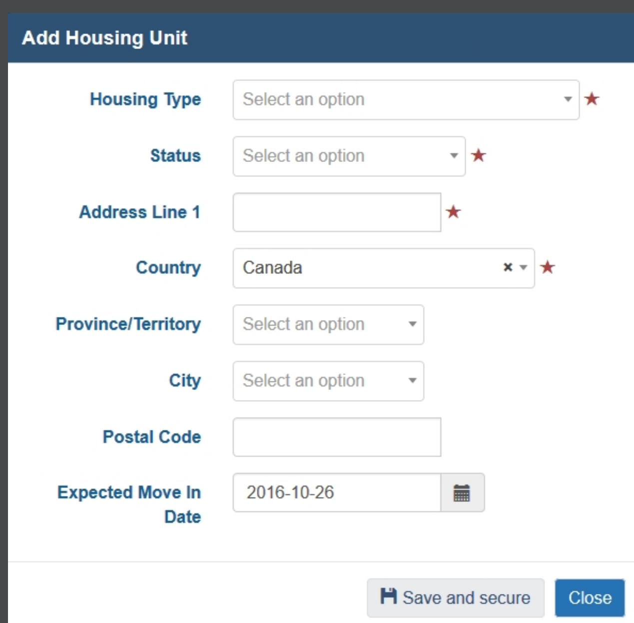
Manage a Housing Placement

See Manage a Housing Placement (on page 52)

Add and Secure Housing Unit

1. Click on the **ADD AND SECURE A HOUSING UNIT** button

Now you're on the **Add Housing Unit** pop-up



2. Select the Housing Type
3. Select the Status (what condition is the unit in?)
4. Enter the Address, Country, Province/Territory, and City

5. Enter the Expected Move In Date
6. Click on the **SAVE AND SECURE** button

Now you're on the **Housing Placement Details** screen with the Housing Placement Status of Housing Secured.

How To: Search for and Secure an Existing Housing Unit

> This function is used to place a Client in a Housing Unit that already exists in the **Housing Unit List**. To place a Client in a new Housing Unit, see Add and Secure Housing for an Existing Housing Placement (on page 57).

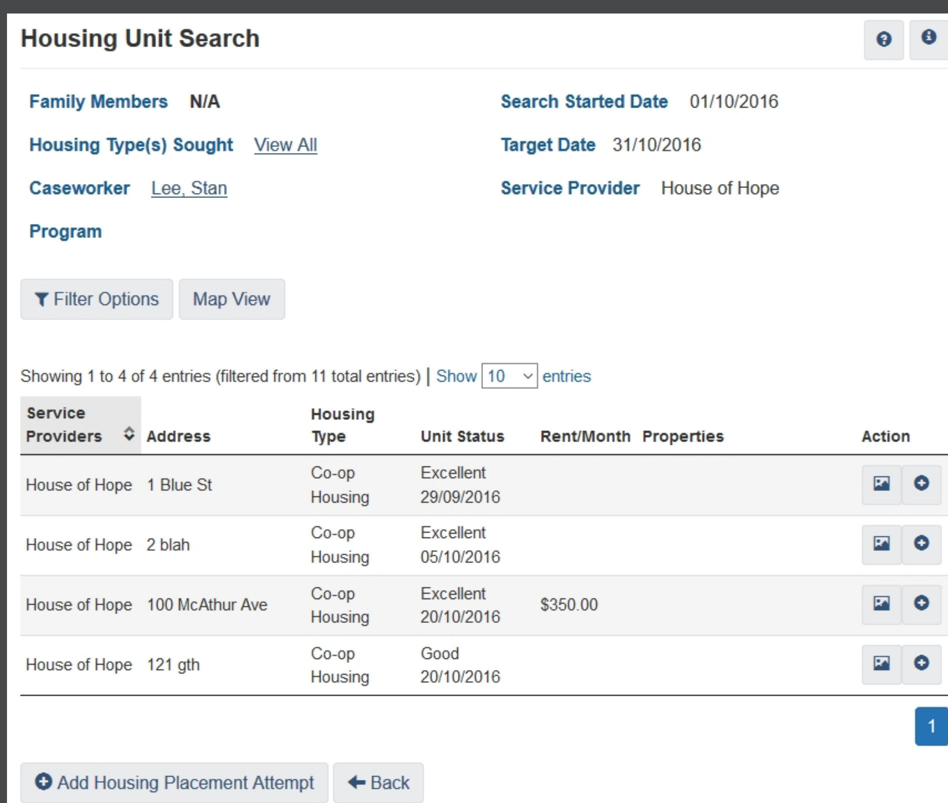
Manage a Housing Placement

See Manage a Housing Placement (on page 52)

Search for Housing

1. Click on the **NEW HOUSING SEARCH** button.

Now you're on Housing Unit Search

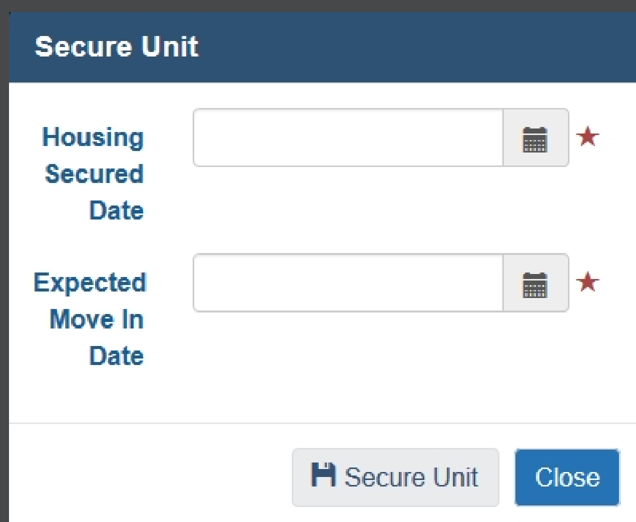


2. There will be a list of Housing Units that match the Housing Type(s) Sought
3. Click on the **FILTER OPTIONS** button to change the housing types displayed
4. In the sidebar that appears, click the Select All button next to Housing Type(s) Sought.
5. Click on the **APPLY FILTERS** button
6. The list of Housing Units should change to reflect the new options

Secure Housing Unit

1. Click on the button next to the Housing Unit you'd like to secure for your Client

Now you're on the **Secure Unit** pop-up



2. Enter the Housing Secured Date
3. Enter the Expected Move In Date
4. Click on the **SECURE UNIT** button

Now you're on the **Housing Placement Details** screen with the Housing Placement Status of Housing Secured.

How To: Add a Document to a Housing Placement

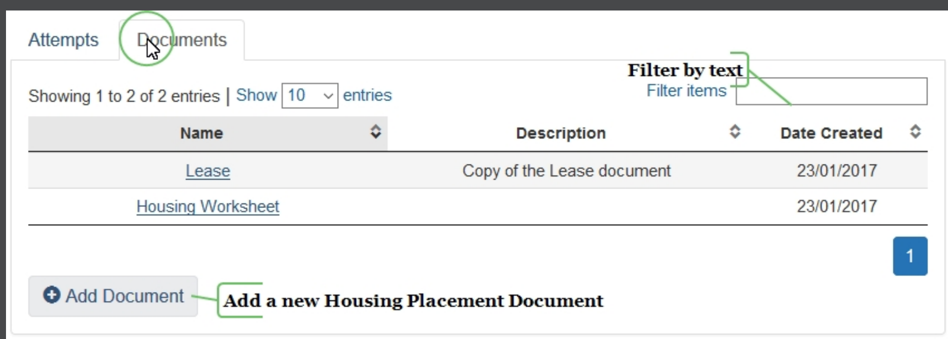
Manage a Housing Placement

See Manage a Housing Placement (on page 52)

Go to Documents Tab

1. Click on the **DOCUMENTS** tab

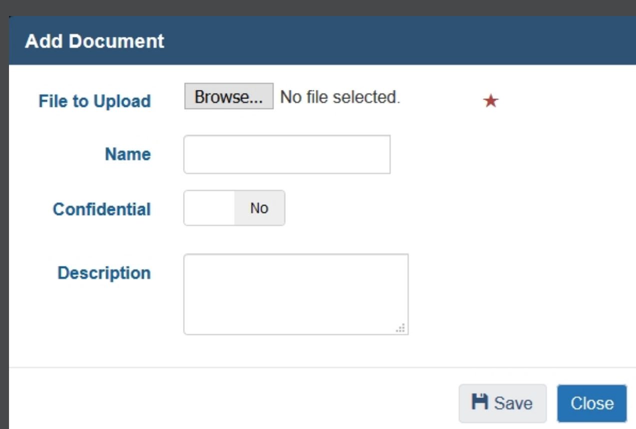
Now you're on the **Documents** tab



Add Document

1. Click on the **ADD DOCUMENT** button

Now you're on the **Add Document** pop-up



2. Click **BROWSE…**.
    a. In the File Upload window, navigate to and select the file you wish to upload from your computer
    b. Click **OPEN**
    c. The File Upload window will close and your file name will be listed in the Attachments field
3. Optionally, add a name for this Document
4. Indicate whether this Document is Confidential
5. Optionally, record a description about this Document
6. Click **SAVE** when done

How To: Move Into Secured Unit

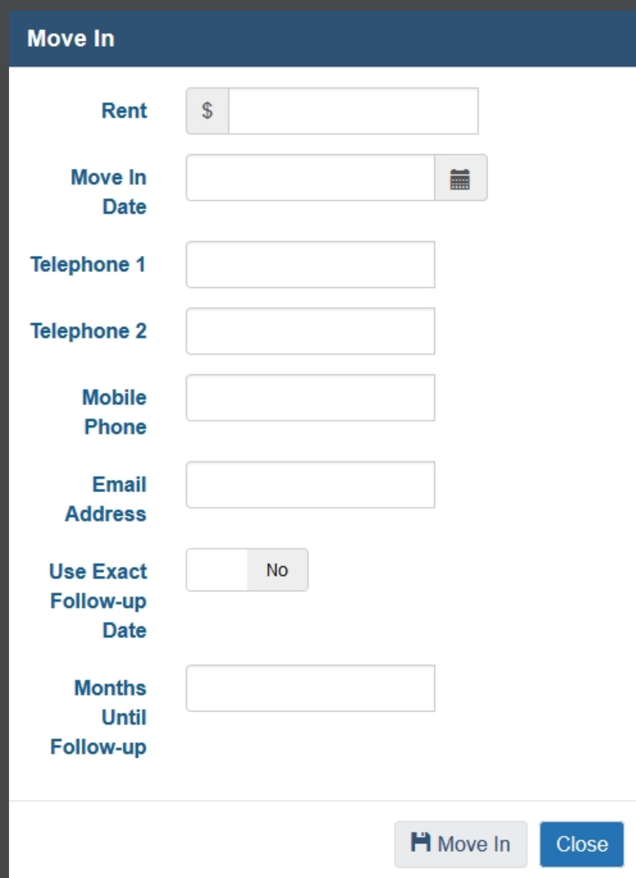
Manage a Housing Placement

See Manage a Housing Placement (on page 52)

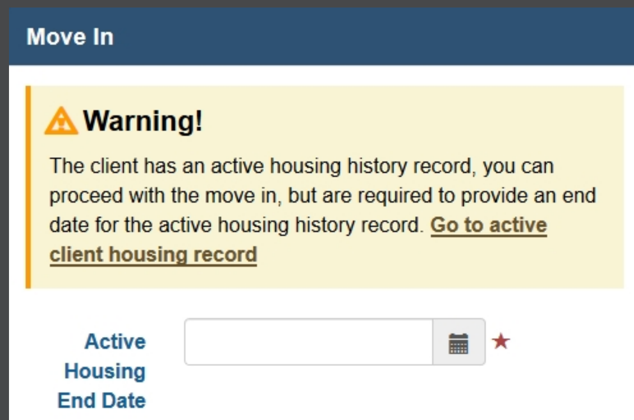
Move In

1. Click on the **MOVE IN** button

Now you're on the **Move In** pop-up

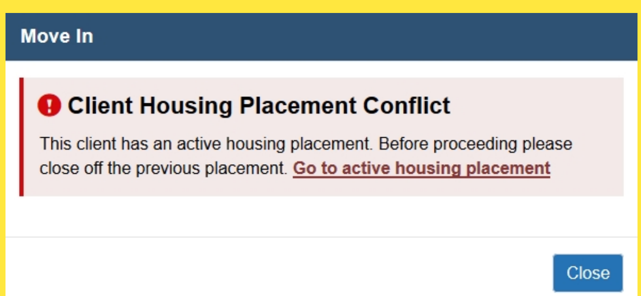


If your client has an active Housing History record, you will see the following warning and additional field at the top of the pop-up:



2. If your client has an active Housing History, specify the End Date (move-out date) for the client's current housing
3. Enter the rent
4. Select the Move In Date
5. Optionally, enter the contact information (Telephone 1, Telephone 2, Mobile Phone, and/or Email Address) for the Housing Unit being moved into
6. Specify the number of Months Until Follow Up
7. Click on the **MOVE IN** button

If the client already has an active Housing Placement, instead of saving, you will get a pop-up telling you that the client already has an active Housing Placement. It doesn't make sense for two case files to exist that both indicate they are helping the same client find different housing. At this point, you must close the existing Housing Placement before proceeding (see Follow Up and Close File (on page 70)).



Now you're on the **Housing Placement Details** screen with the Housing Placement Status of Moved Into Housing.

How To: Add a Housing Subsidy to a Housing Placement

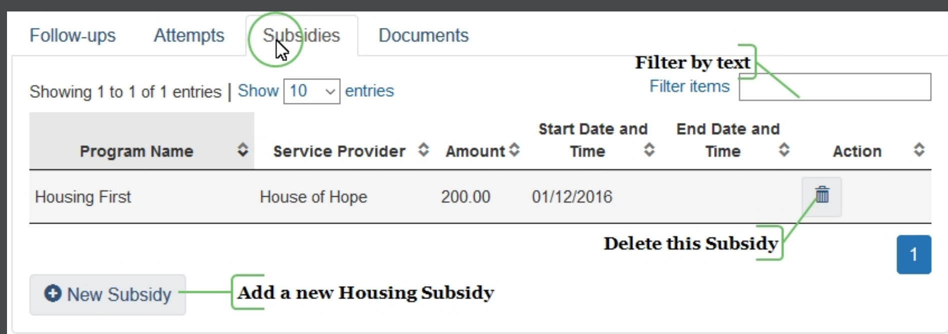
Manage a Housing Placement

See Manage a Housing Placement (on page 52)

Go to Subsidies Tab

1. Click on the **SUBSIDIES** tab

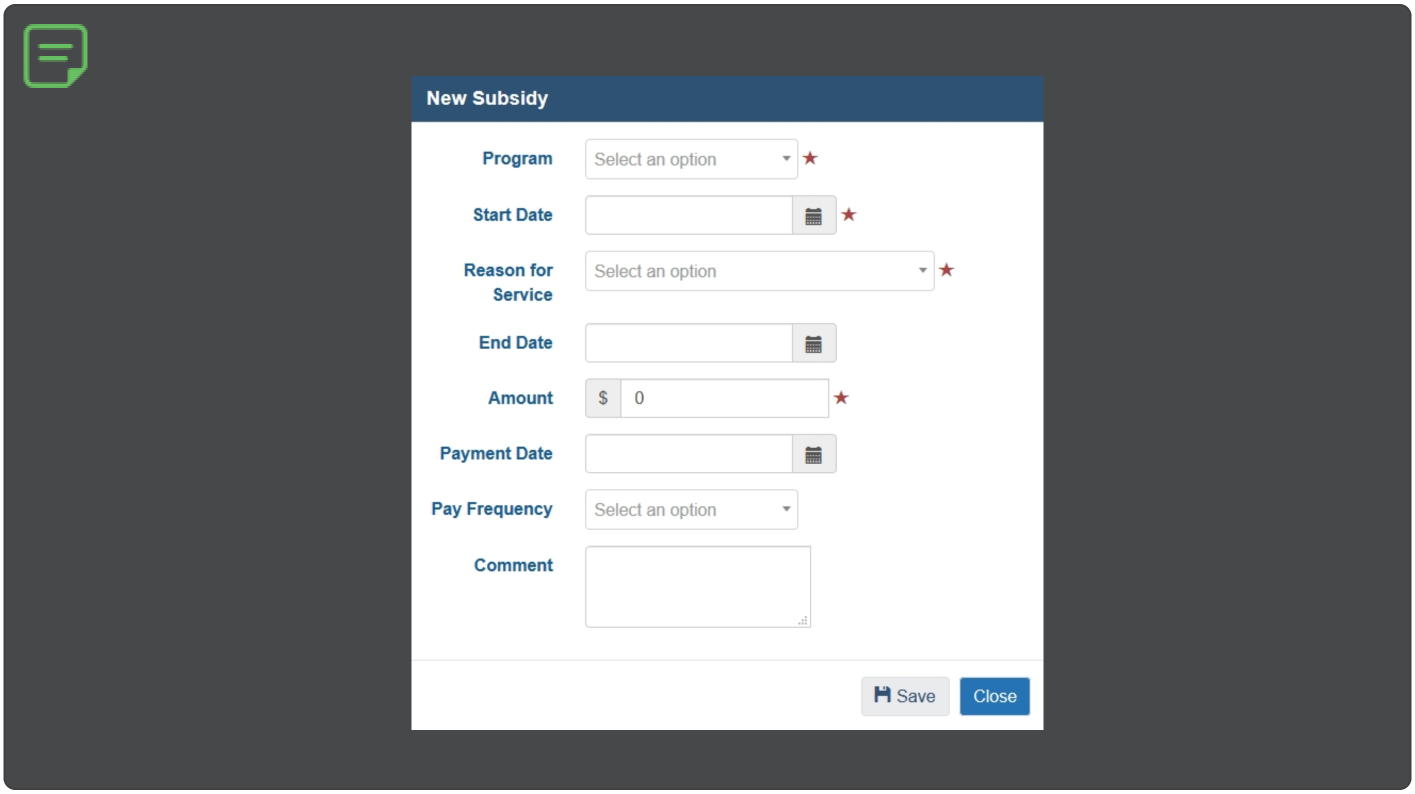
Now you're on the **Housing Subsidies** Tab



Add a Housing Subsidy

1. Click on the **NEW SUBSIDY** button

Now you're on the **New Subsidy** pop-up



2. Select the Program
3. Enter the Start Date on which the Housing Subsidy begins
4. Enter the Reason for this Housing Subsidy
5. If the Housing Subsidy is time-limited, or in the past, add an End Date. Otherwise, leave it blank.
6. Enter the dollar amount for the monthly Housing Subsidy.
7. Optionally, enter the payment date
8. Optionally, enter the pay frequency
9. Click **SAVE** when done

How To: Follow Up on Housing Placement and schedule another Follow Up

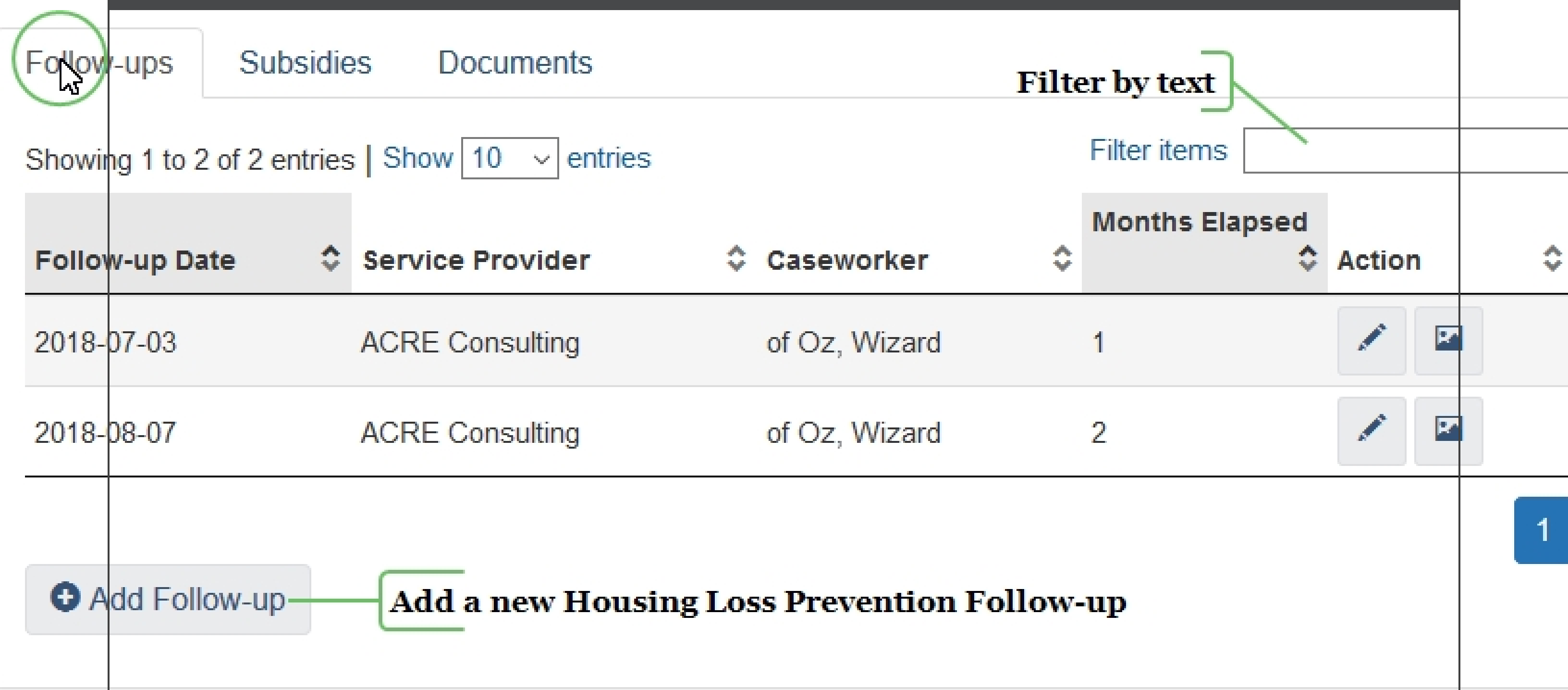
Manage a Housing Placement

See Manage a Housing Placement (on page 52)

Go to Follow-ups Tab

1. Click on the **FOLLOW-UPS** tab

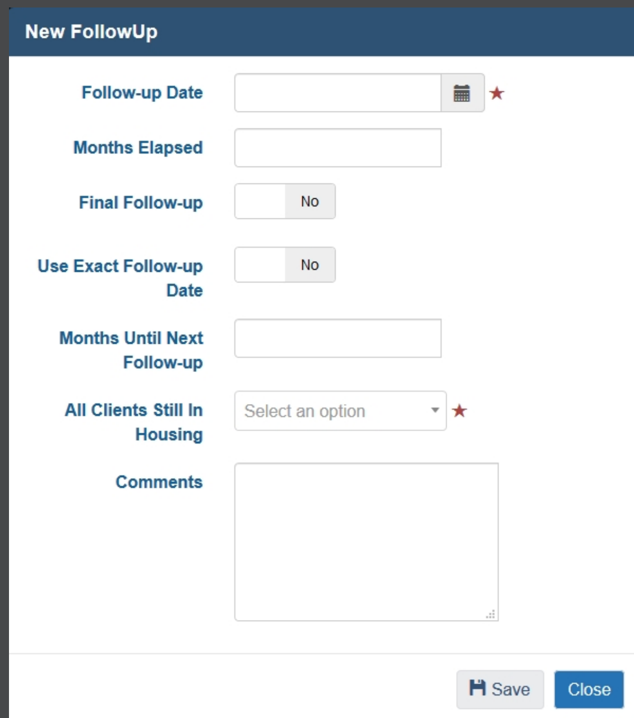
Now you're on **Follow-Ups** Tab



Follow Up and Schedule Next Follow Up

1. Click on the **ADD FOLLOW-UP** button

Now you're on the **Add Housing Placement Follow-up** pop-up



2. Select the date of the Follow-Up
3. Specify the number of months elapsed since move-in
4. Toggle Final Follow-up to "No"
5. Either select a date for the next follow up, or enter the number of months until the next follow up
6. Specify whether All Clients are Still in Housing
7. If not all clients are still in the housing unit, specify which clients have left, why they left, and are they housed elsewhere
8. Optionally, add comments
9. Click on the **SAVE** button

Now you're on **Client Housing Placement List**

How To: Follow Up and Close File

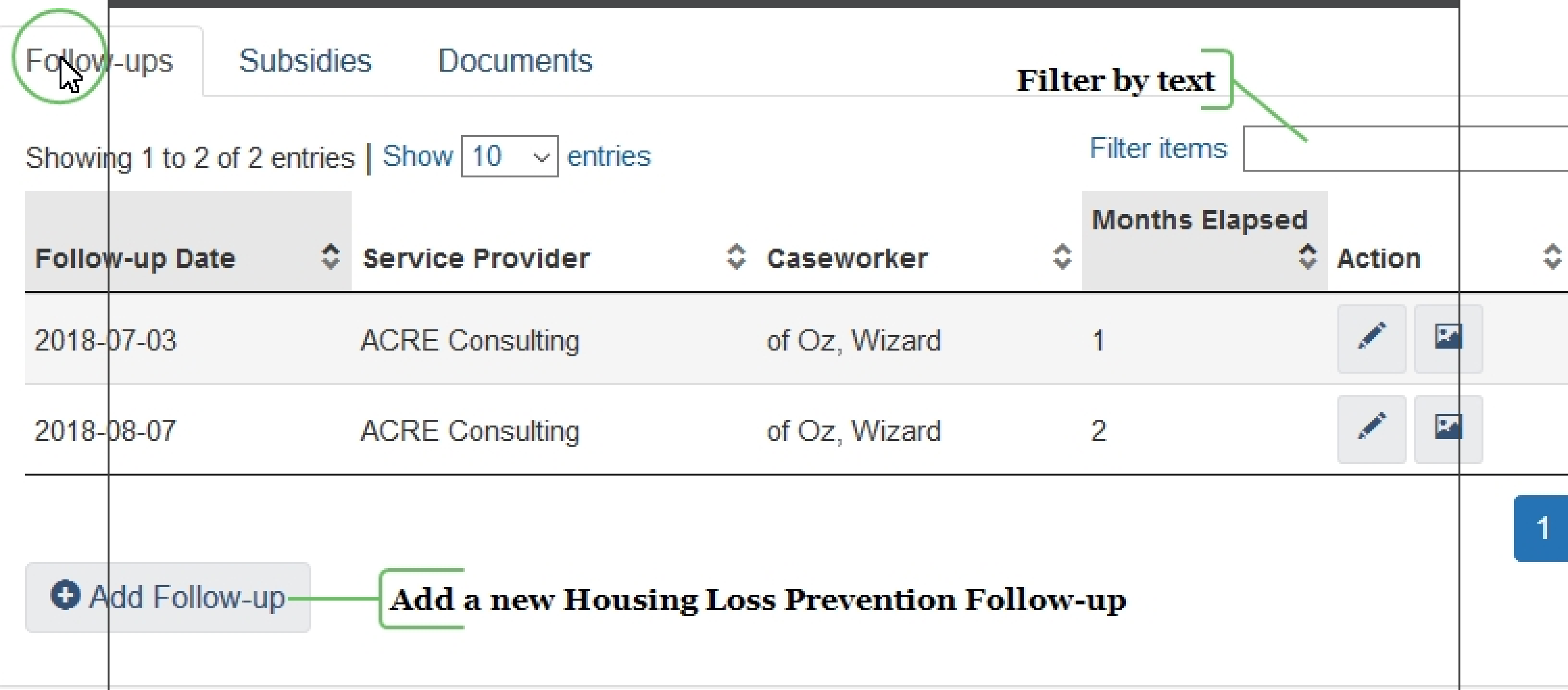
Manage a Housing Placement

See Manage a Housing Placement (on page 52)

Go to Follow-ups Tab

1. Click on the **FOLLOW-UPS** tab

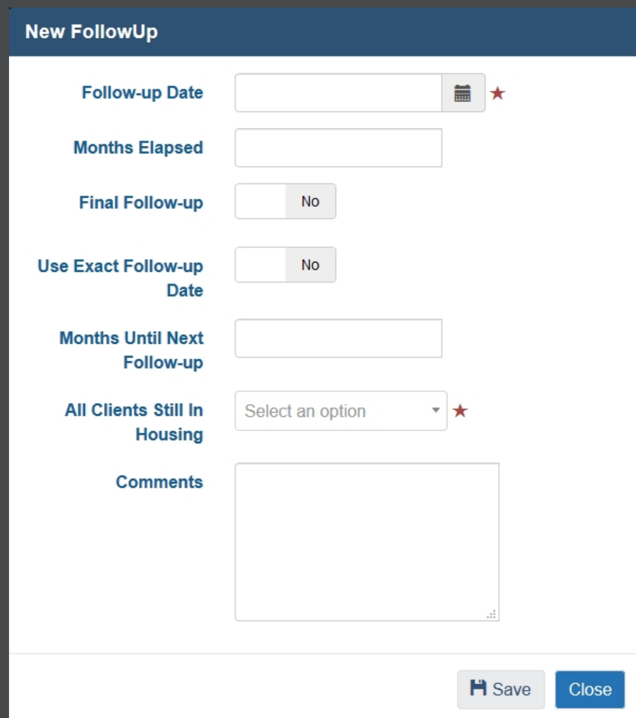
Now you're on **Follow-Ups** Tab



Follow Up and End Housing Placement

1. Click on the **ADD FOLLOW-UP** button

Now you're on the **New Follow-up** pop-up



2. Select the Date of the Follow-Up. This is the date that you checked in on the Client.
3. Enter the number of Months Elapsed since the Client moved in.
4. Toggle Final Follow-up to "Yes." This will close the file for the Housing Placement.
5. Specify whether All Clients are Still in Housing.
   a. If not all clients are still in the housing unit, specify which clients have left, why they left, and are they housed elsewhere.
6. Enter some Comments about this Follow-up.
7. Click on the **SAVE** button

Now you're on **Client - Housing Placement List**

CHAPTER 5: Housing Units

The Housing Units module is a repository of all the Housing Units that are available for use in the Housing Placements module (and also includes Housing Units that are temporarily unavailable).

With the Housing Units module, users can:

- Maintain an inventory of what Housing Units are available in the community
- Keep a list of Landlords in the community, and their contact information
- Record when Maintenance was performed on Housing Units that you manage

> Maintaining a Housing Unit inventory is optional. Users can complete a Housing Placement and add a new Housing Unit on the fly. It is not necessary to pre-populate the Housing Units List prior to use.

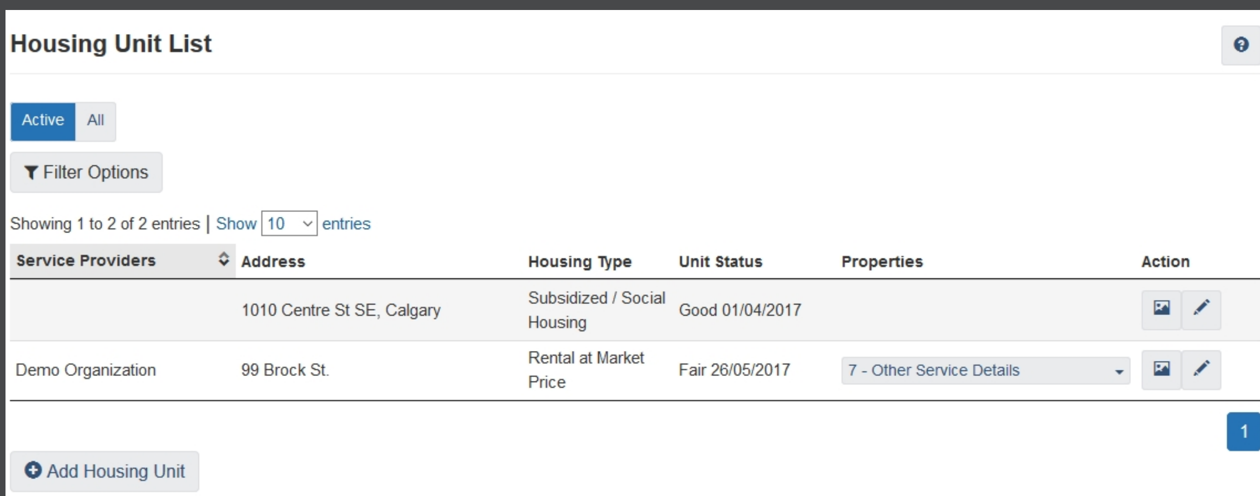
Chapter Contents

How To: Browse Housing Units

Go to the Housing Unit List

1. Click on the **FRONT DESK MENU**
2. Click on **HOUSING PLACEMENT**
3. Click on **HOUSING UNIT**

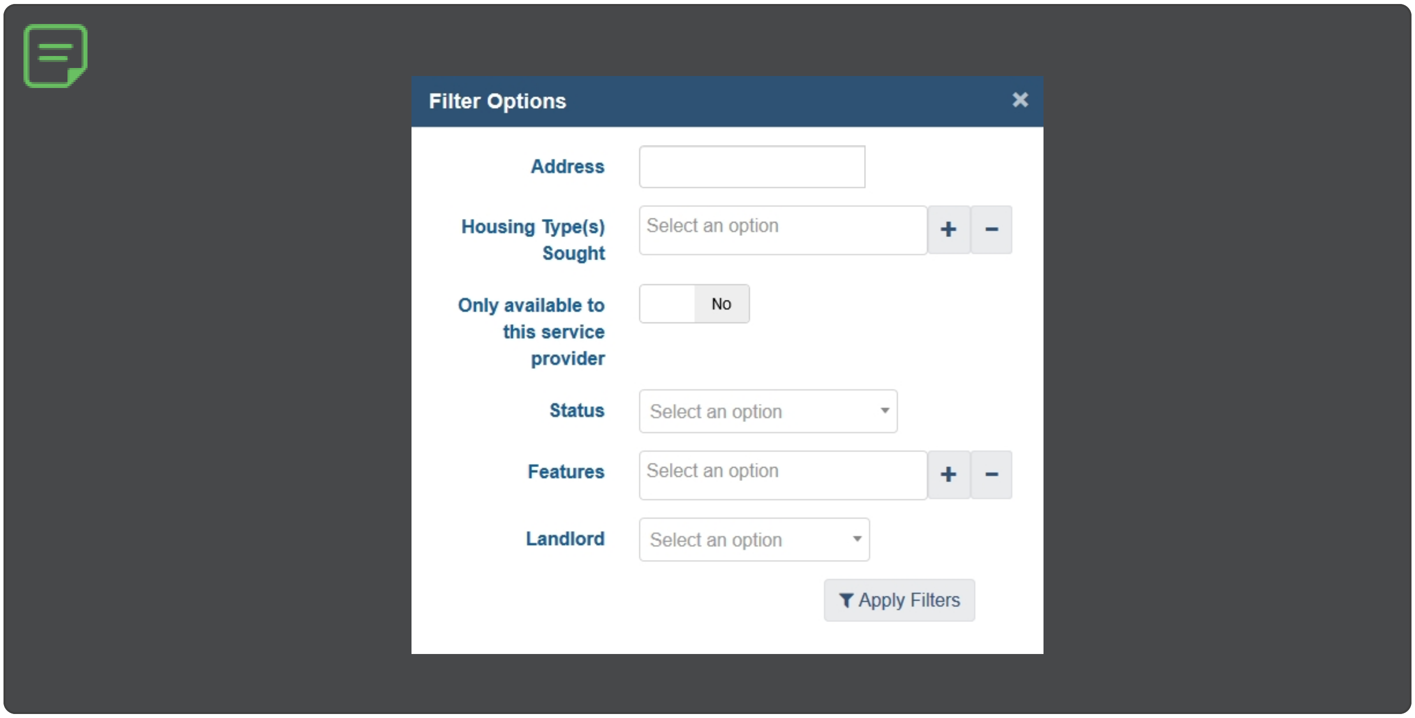
Now you're on the **Housing Unit List**



Filter Housing Units

1. Click on the **FILTER OPTIONS** button

Now you'll see the **Filter Options** pop-up



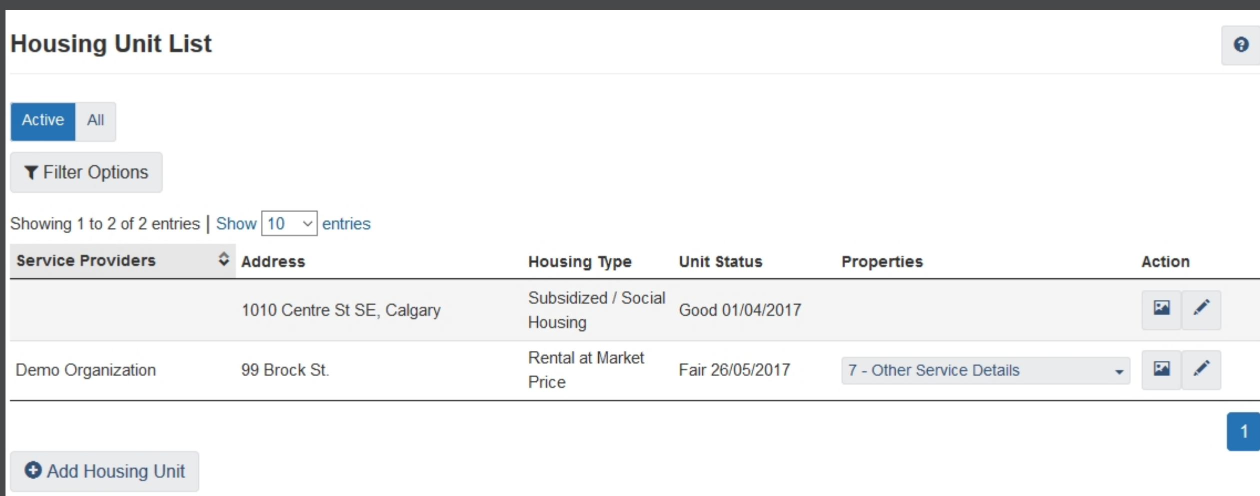
2. Use the fields to enter the search parameters for the Housing Unit(s) you would like to display
3. Click **APPLY FILTERS** when done

How To: Add a Housing Unit

Go to the Housing Unit List

1. Click on the **FRONT DESK MENU**
2. Click on **HOUSING PLACEMENT**
3. Click on **HOUSING UNIT**

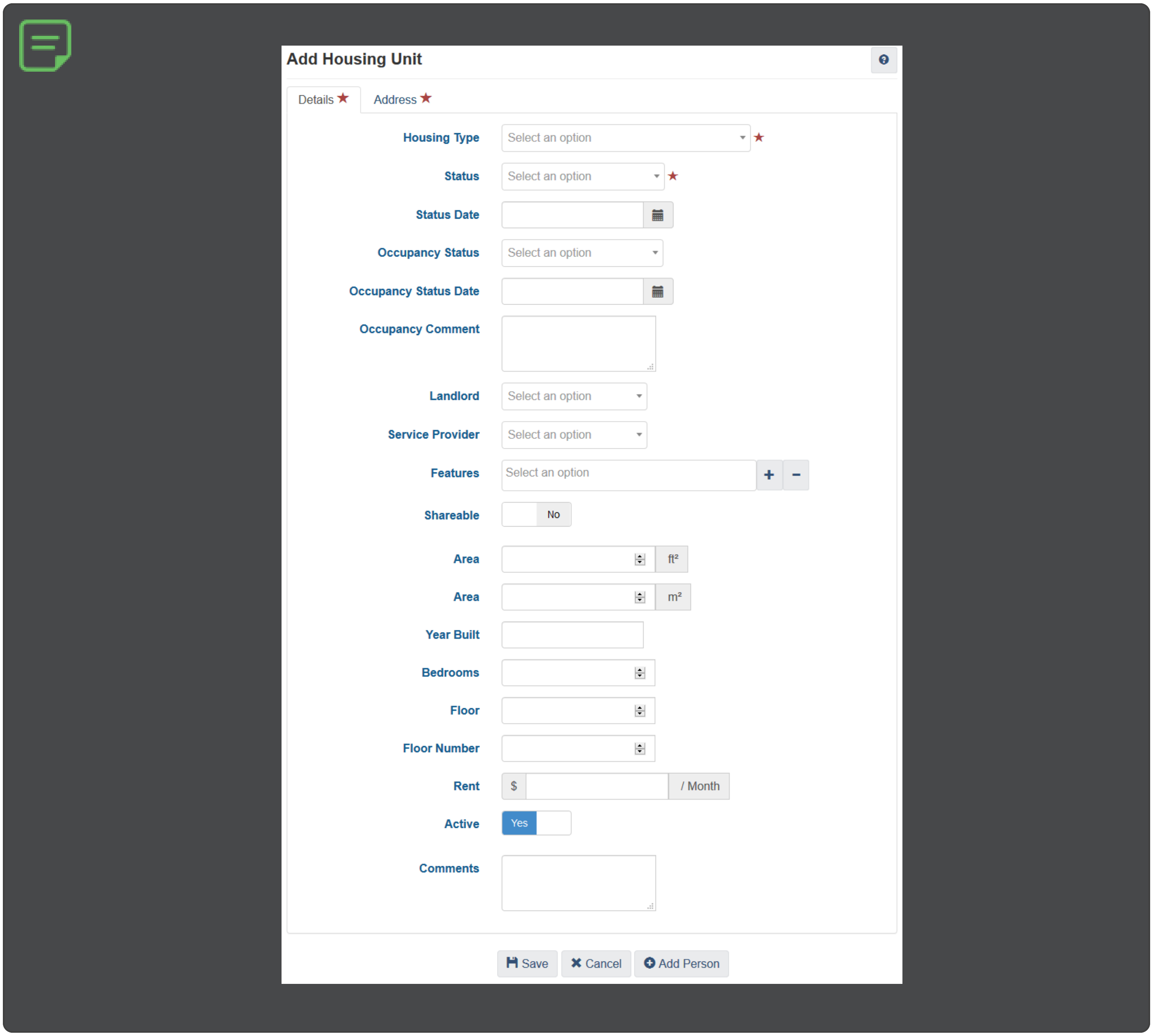
Now you're on the **Housing Unit List**



Add a Housing Unit

1. Click on the **ADD HOUSING UNIT** button

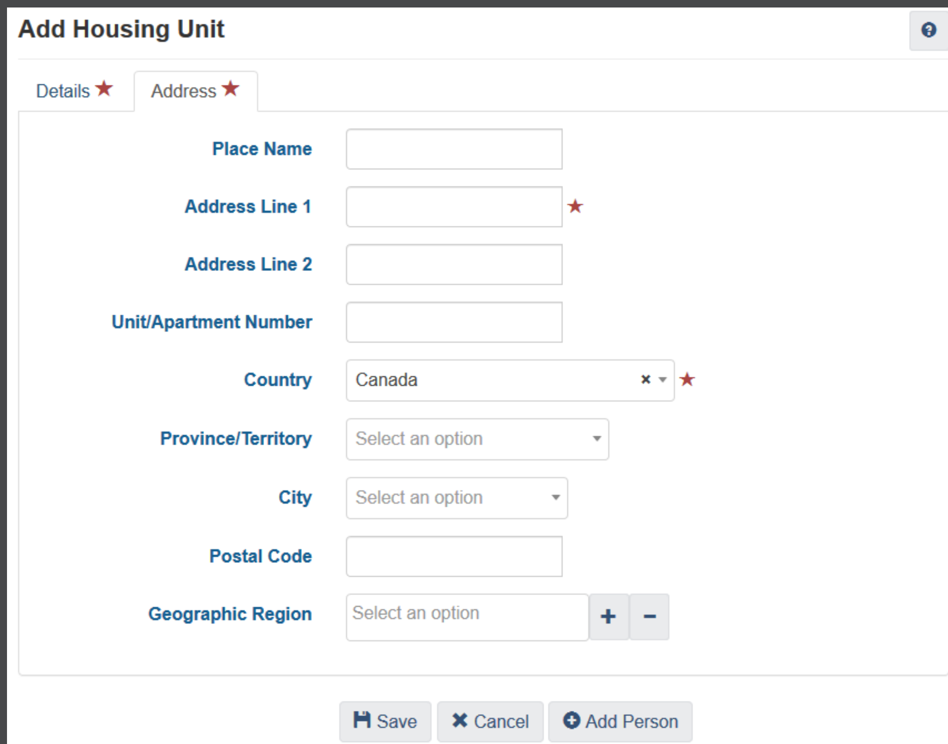
Now you're on the **Add Housing Unit** Screen, on the **Details Tab**



2. Select Housing Type
3. For Status, select the condition the Unit is in
4. For Status Date, select the date on which the condition was last assessed
5. For Occupancy Status, indicate whether the Unit is currently available or currently occupied
6. For Occupancy Status Date, indicate the date on which the Occupancy Status was last assessed
7. Optionally, add a comment about the Occupancy Status

8. Optionally, select a Landlord for this Unit
9. If this Housing Unit belongs to one Service Provider in particular (i.e. supportive housing), select that service provider in the Service Provider field
10. Optionally, select which features this Unit includes
11. Indicate whether this Unit can be shared with other Clients
12. Optionally, indicate the Area of the Unit
13. Optionally, record the Year the Unit was built
14. Optionally, record the number of Bedrooms in this Unit
15. Optionally, record the number of Floors of the building in the Floor field
16. Optionally, record the Floor Number that the Unit is located on
17. Optionally, enter the full asking amount of rent for the unit. For example, if the landlord is asking for $600, enter that value.
18. Indicate whether this Unit listing is currently Active
19. Optionally, add additional notes about this Unit
20. Click on the **ADDRESS TAB**

Now you're on the **Add Housing Unit** Screen, on the **Address Tab**



21. Optionally, enter the name of the building as Place Name
22. Enter the Address in the Address Line 1 field
23. Optionally, add an Address Line 2
24. Optionally, add the Unit/Apartment Number
25. Select the Country. If the Country selected is Canada, additional fields for Province/Territory, City, and Postal Code will appear
26. Optionally, select the Geographic Region for this Unit
27. Click **SAVE** when done

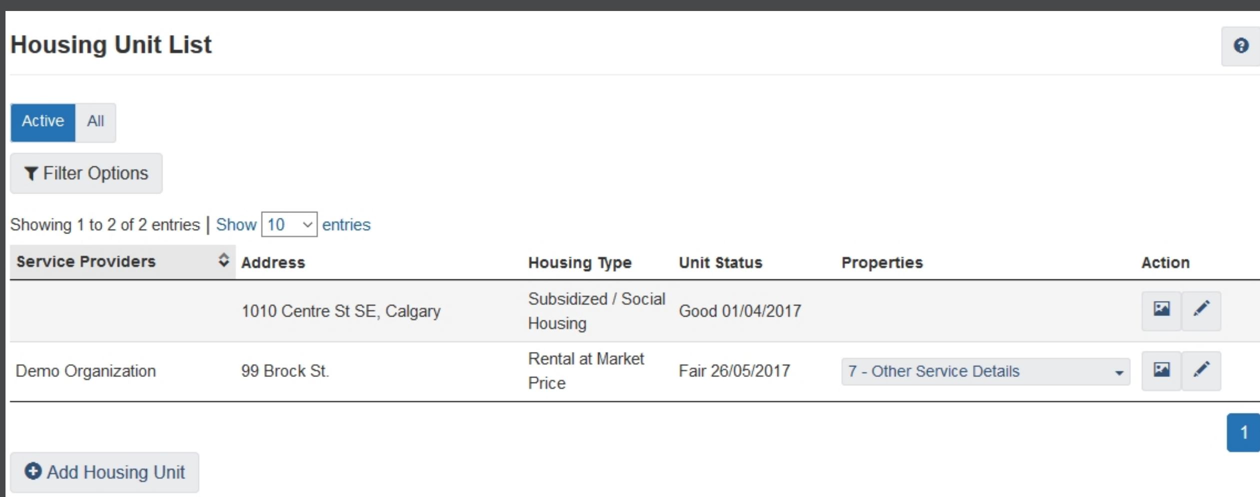
Now you're on the **Housing Unit List** Screen

How To: Edit a Housing Unit

Go to the Housing Unit List

1. Click on the **FRONT DESK MENU**
2. Click on **HOUSING PLACEMENT**
3. Click on **HOUSING UNIT**

Now you're on the **Housing Unit List**



Edit a Record

1. Click on or Edit for the record you would like to edit

Now you're on the **Edit** Screen

How To: Add a Maintenance Record to a Housing Unit

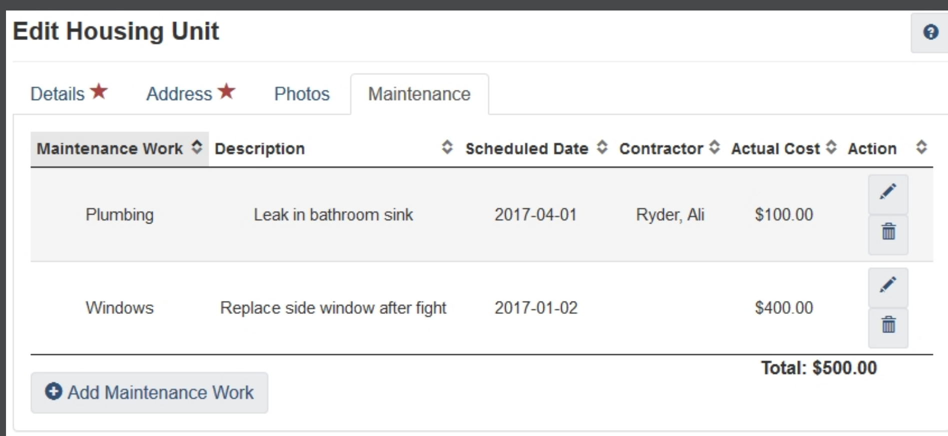
Edit a Housing Unit

See Edit a Housing Unit (on the previous page).

Go to Maintenance Tab

1. Click on the **MAINTENANCE** tab

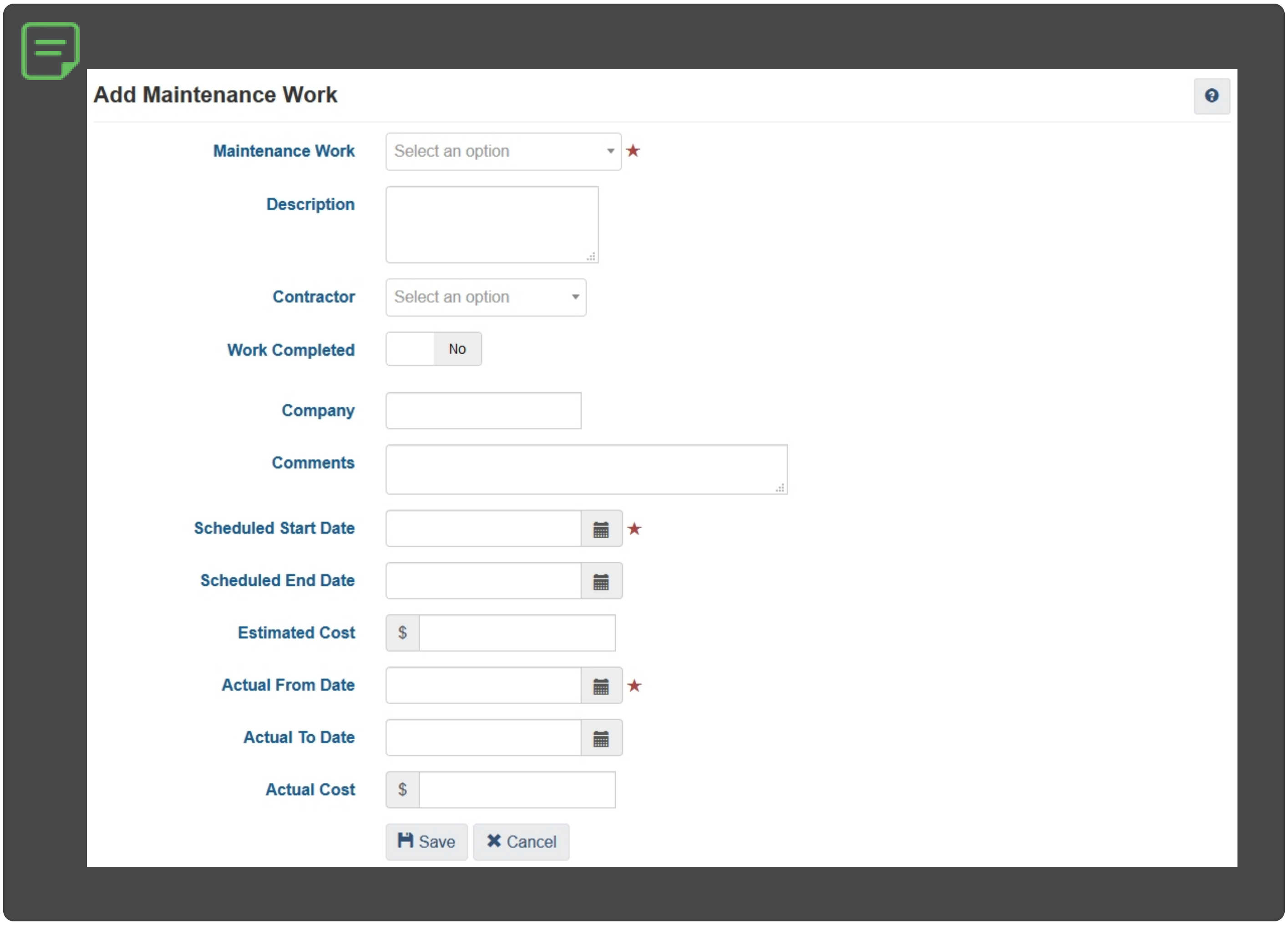
Now you're on the **Maintenance** tab



Add a Maintenance Record

1. Click on the **ADD MAINTENANCE WORK** button

Now you're on the **Add Maintenance Work** Screen



2. Select the type of Maintenance Work completed
3. Add a description about this Maintenance Work
4. Optionally, select the Contractor from the drop-down list
5. Indicate whether the Maintenance Work was completed
6. Optionally, enter the Company that performed this work
7. Optionally, record some notes about this Maintenance Work
8. Select the Scheduled Start Date of this Maintenance Work
9. Optionally, select the Scheduled End Date of this Maintenance Work
10. Optionally, enter the Estimated Cost of this Maintenance Work
11. Select the date the Maintenance Work actually started
12. Optionally, select the date the Maintenance Work actually completed

13. Optionally, enter the Actual Cost of this Maintenance Work
14. Click **SAVE** when done

Now you're on the **Edit Housing Unit** Screen

How To: Add Photos of a Housing Unit

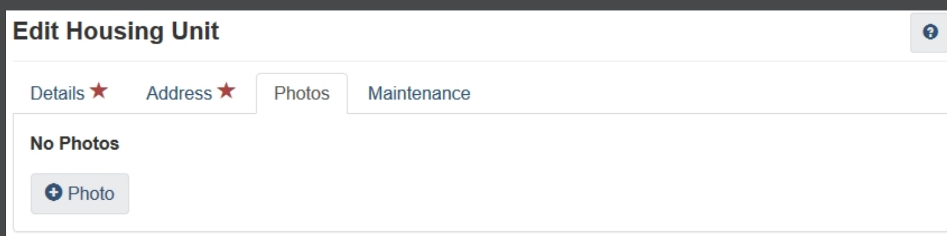
Edit a Housing Unit

See Edit a Housing Unit (on page 79).

Go to Photos Tab

1. Click on the **PHOTOS** tab

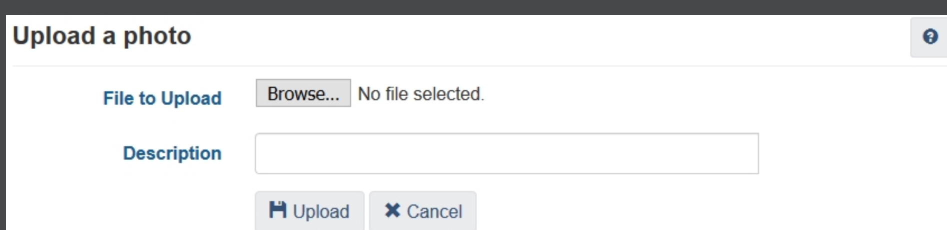
Now you're on the **Photos** tab



Add a Photo

1. Click on the **+ PHOTO** button

Now you're on the **Upload a photo** Screen



2. Click **BROWSE…**.
    a. In the File Upload window, navigate to and select the file you wish to upload from your computer
    b. Click **OPEN**
    c. The File Upload window will close and your file name will be listed in the Attachments field
3. Optionally, record a description about this Photo
4. Click **SAVE** when done

Now you're on the **Edit Housing Unit** Screen

How To: Delete a Housing Unit

As of Build 4.0.55, Housing Units cannot be deleted. However, they can be Deactivated (see Deactivate a Housing Unit (on the facing page)) or made temporarily unavailable (see Mark a Housing Unit as Temporarily Unavailable (on page 87)).

How To: Deactivate a Housing Unit

Edit a Housing Unit

See Edit a Housing Unit (on page 79).

Deactivate the Record

1. Toggle the Active field to "No"
2. Click on the **SAVE** button

How To: Mark a Housing Unit as Temporarily Unavailable

Edit a Housing Unit

See Edit a Housing Unit (on page 79).

Change the Occupancy Status

1. Change the Occupancy Status field from "Available" to another option corresponding with its reason for unavailability
2. Change the Occupancy Status Date field to the date corresponding with the new status
3. Optionally, add a note in the Occupancy Comment field
4. Click on the **SAVE** button

CHAPTER 6: Assessments

Chapter Contents

How To: Add a VI-SPDAT

Go to the SPDAT List

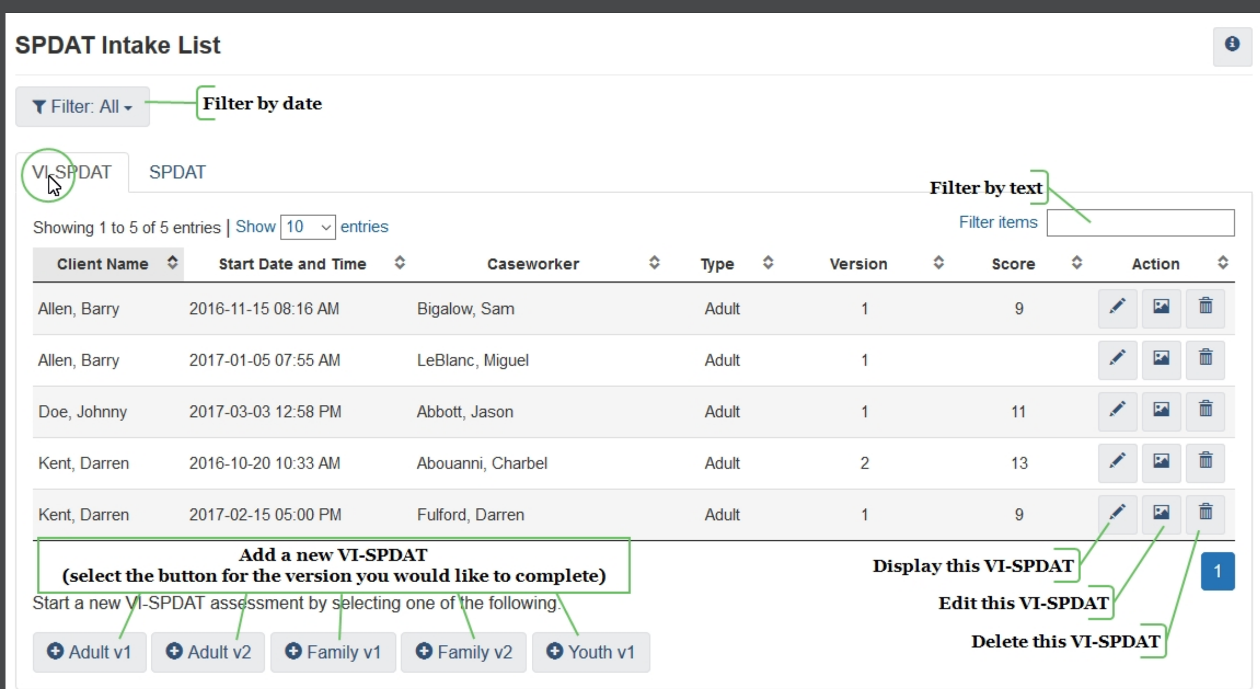
1. Click on the **FRONT DESK MENU**
2. Click on **ASSESSMENTS**
3. Click on **SPDAT**

Now you're on the **SPDAT Intake List**

Go to the VI-SPDAT Tab

1. Click on the **VI-SPDAT** tab

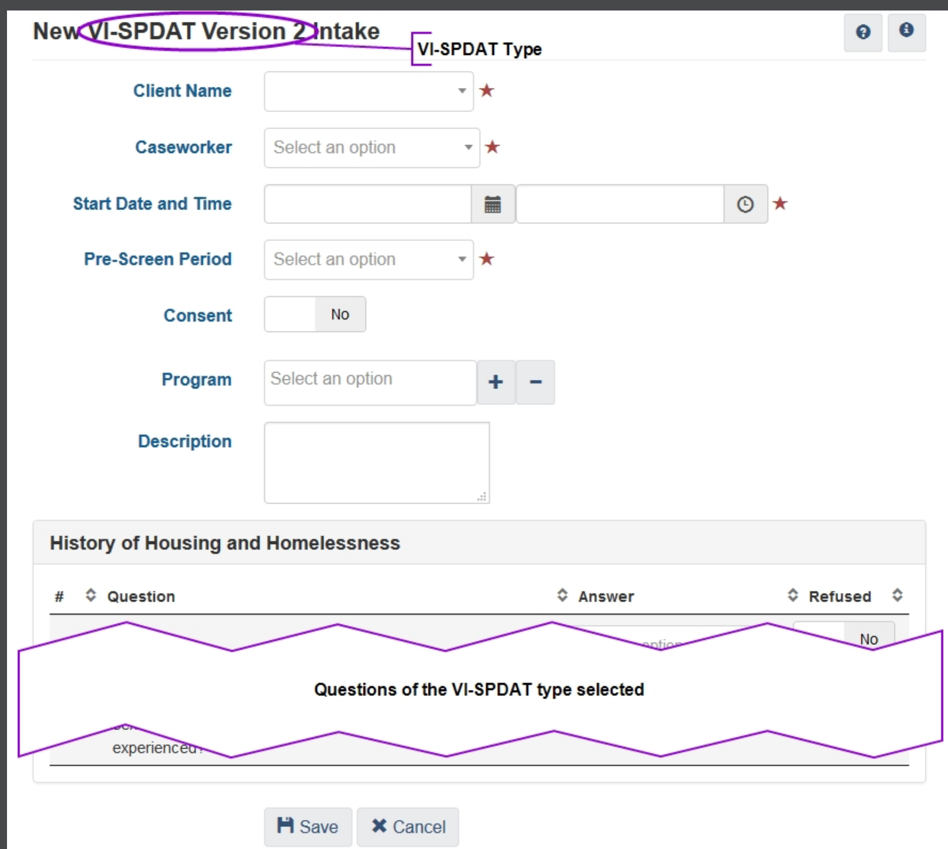
Now you're on the **VI-SPDAT** Tab



Add a VI-SPDAT

1. Choose which version of VI-SPDAT you would like to do (i.e. VI-SPDAT v2, F-VI-SPDAT v2, TAY-VI-SPDAT v1)
2. Click on the button corresponding to the type of VI-SPDAT you would like to do (for example, if you wanted to do a TAY-VI-SPDAT v1, click on the **+YOUTH V1** button)

Now you're on **Add VI-SPDAT** Screen for the type of VI-SPDAT you selected



3. Select the Client Name. If you arrived here from the **Client - SPDAT List** screen, this field is already filled out.
4. Select the caseworker who completed the assessment
5. Confirm the start date and time. If needed, you can change this date and time manually.
6. Select the Pre-Screen Period for this VI-SPDAT assessment. What this means is how many times has this client completed a VI-SPDAT? Is this the first, second, etc. time?

7. If applicable, indicate whether the client was pregnant at the time of the VI-SPDAT assessment (only asked for some VI-SPDAT versions)
8. Indicate whether the client provided consent to complete this assessment
9. Select the program this assessment was completed in
10. Add a description about this assessment
11. For each question on the VI-SPDAT, select the Client's answer. If the Client did not answer, toggle Refused to "Yes"
12. Click the **SAVE** button.

Now you're on **Display VI-SPDAT** Screen

How To: Add a SPDAT

Go to the SPDAT List

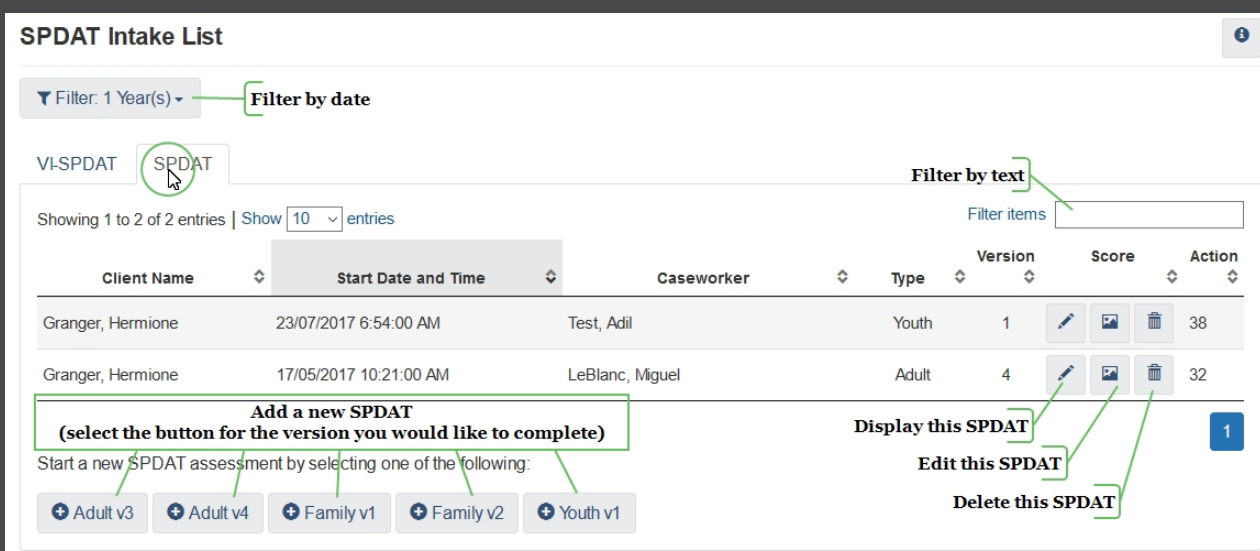
1. Click on the **FRONT DESK MENU**
2. Click on **ASSESSMENTS**
3. Click on **SPDAT**

Now you're on the **SPDAT Intake List**

Go to the SPDAT Tab

1. Click on the **SPDAT** tab

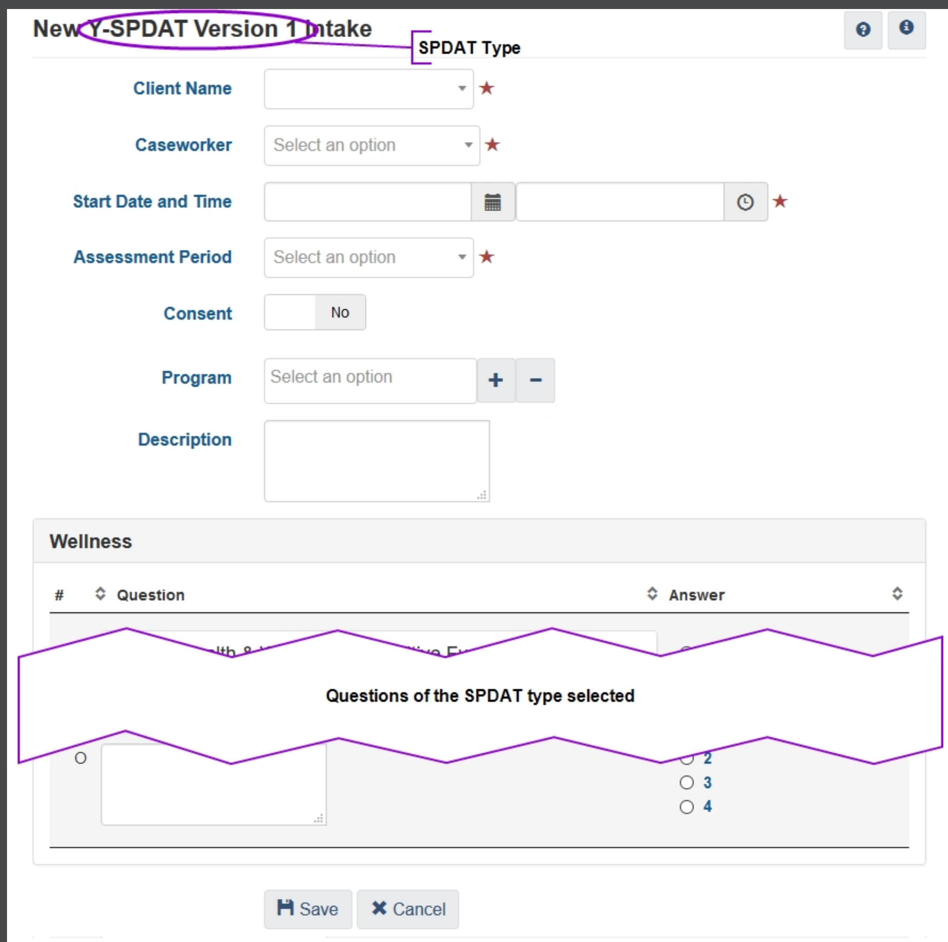
Now you're on the **SPDAT** tab



Add a SPDAT

1. Choose which version of SPDAT you would like to do (i.e. SPDAT v4, F-SPDAT v2, Y-SPDAT v1)
2. Click on the button corresponding to the type of SPDAT you would like to do (for example, if you wanted to do an F-SPDAT v2, click on the **+FAMILY V2** button)

Now you're on the **Add SPDAT** screen for the type of SPDAT you selected



3. Select the Client Name. If you arrived here from the **Client - SPDAT List** screen, this field is already filled out.
4. Select the caseworker who completed the assessment
5. Confirm the start date and time. If needed, you can change this date and time manually.
6. Select the Assessment Period for this SPDAT assessment
7. Indicate whether the client provided consent to complete this assessment
8. Select the program this assessment was completed in
9. Add a description about this assessment

10. For each component on the SPDAT, fill in, at a minimum, the numerical value in the Answer column. Optionally, you can also provide some comments for each component.
11. Click the **SAVE** button.

Now you're on the **Display SPDAT** screen

How To: Complete New Survey

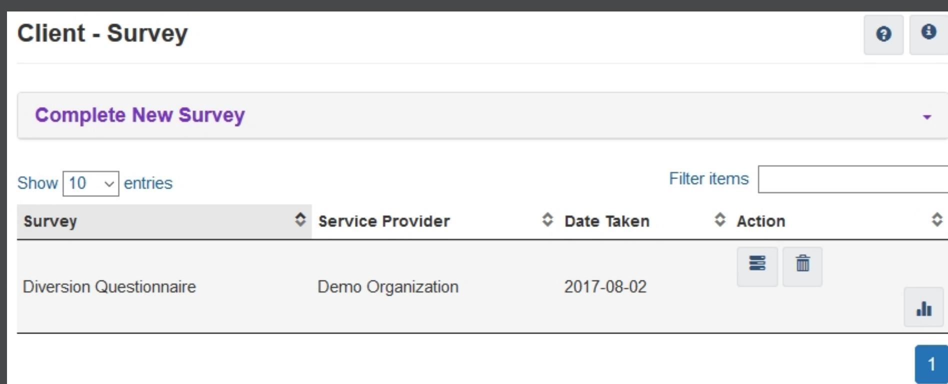
Open a Client File

If you don't already have a Client File open, open one. See Open a Client File (on page 1)

Go to the Client Surveys List

1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **SURVEYS**

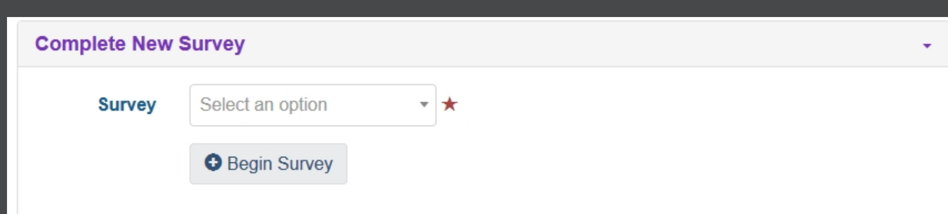
Now you're on the **Client - Survey** screen



Add a Survey

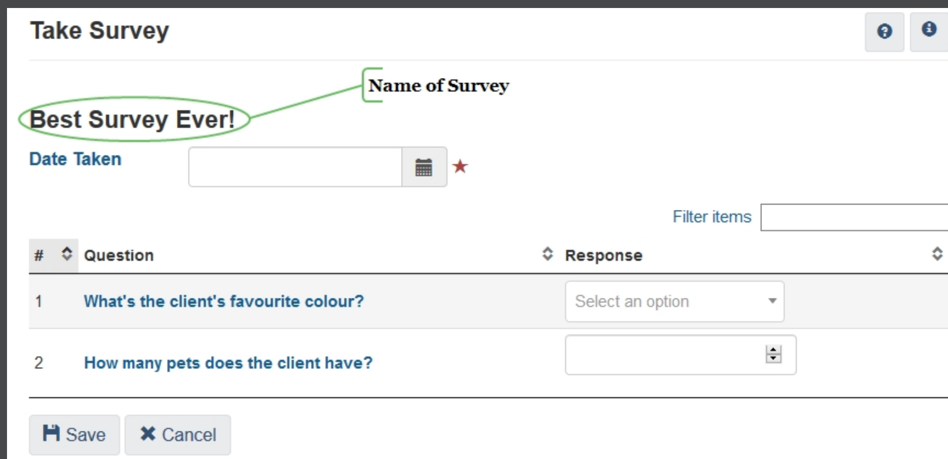
1. Click on **COMPLETE NEW SURVEY**

A new field will reveal, prompting you to select a Survey



2. Select the Survey you would like to complete
3. Click on **+BEGIN SURVEY**

Now you're on the **Take Survey** screen for the Survey you selected



4. Confirm the date the Survey was taken
5. For each question on the Survey, answer the question
6. Click the **SAVE** button

Now you're on the **Client - Survey** screen

CHAPTER 7: Waiting Lists

Although the Waiting Lists module was designed for the purpose of tracking who is waiting for what and for how long, other creative uses of the Waiting Lists module are possible. Some examples:

- The Waiting List module could be easily used for Prioritization or a By-Name List. Although the Waiting List does automatically calculate how long a person has been waiting, that field could be ignored in your community.
- The Waiting List could also be used as a referrals section, by creating a Waiting List that is shared between two Service Providers. One Service Provider could add people to the Waiting List and the other Service Provider could take them off when they have been received.
- The Waiting List could be used as a "to do list" by a team of assessment workers who want a central repository where they can see a list of who has been assessed, who has been contacted by a colleague, who has an appointment booked, and who needs to be assessed.

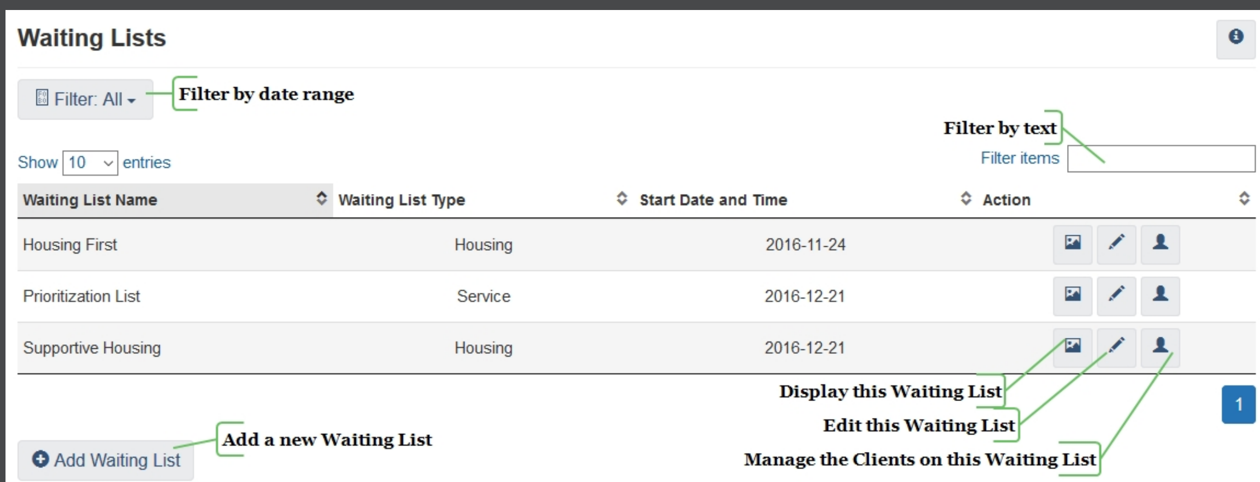
Chapter Contents

How To: See who is on a Waiting List

Go to the Waiting Lists

1. Click on the **FRONT DESK MENU**
2. Click on **WAITING LISTS**

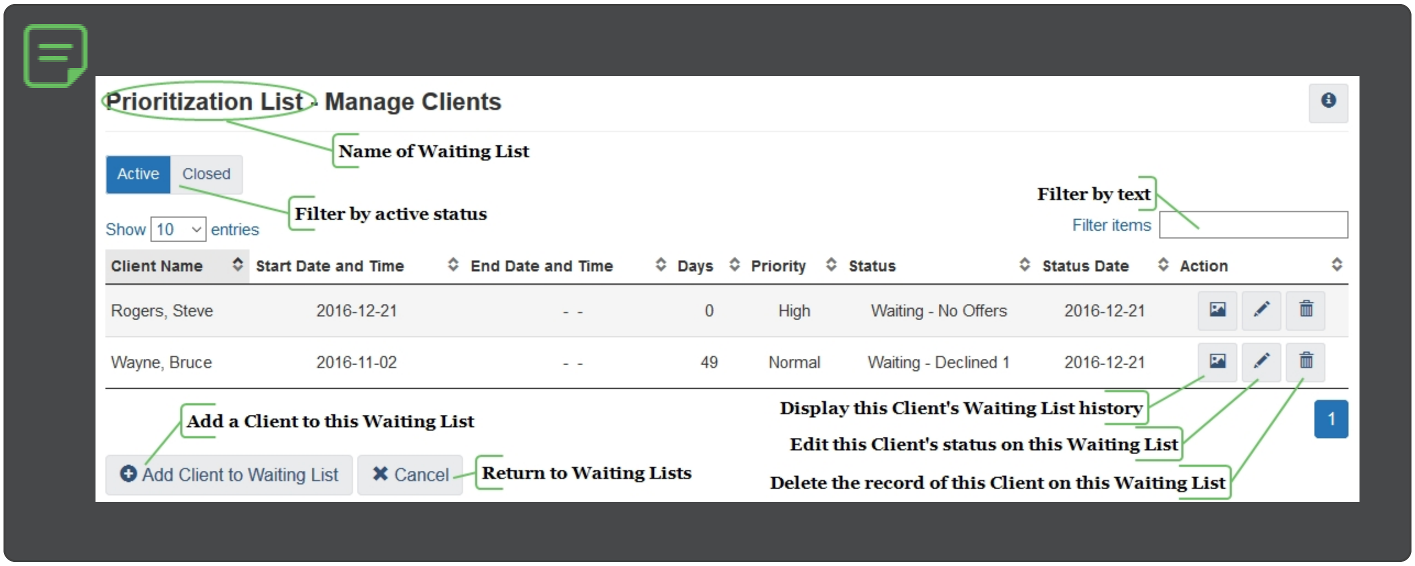
Now you're on the **Waiting Lists** Screen



Manage Clients

1. Click on the button

Now you're on **Manage Clients** Screen


Prioritization List - Manage Clients
Name of Waiting List
Active
Closed
Filter by active status
Filter by text
Show 10 entries
Filter items
Client Name
Start Date and Time
End Date and Time
Days
Priority
Status
Status Date
Action
Rogers, Steve
2016-12-21
- -
0
High
Waiting - No Offers
2016-12-21
Wayne, Bruce
2016-11-02
- -
49
Normal
Waiting - Declined 1
2016-12-21
Add a Client to this Waiting List
Display this Client's Waiting List history
Edit this Client's status on this Waiting List
1
Add Client to Waiting List
Cancel
Return to Waiting Lists
Delete the record of this Client on this Waiting List

How To: See what Waiting List(s) a Client is on

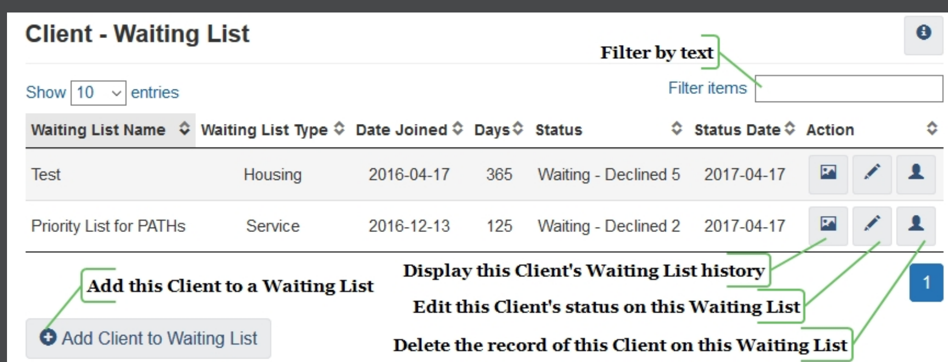
Open a Client File

If you don't already have a Client File open, open one. See Open a Client File (on page 1)

Go to the Client Waiting List Screen

1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **WAITING LISTS**

Now you're on the **Client - Waiting List** Screen



How To: Add a Client to a Waiting List

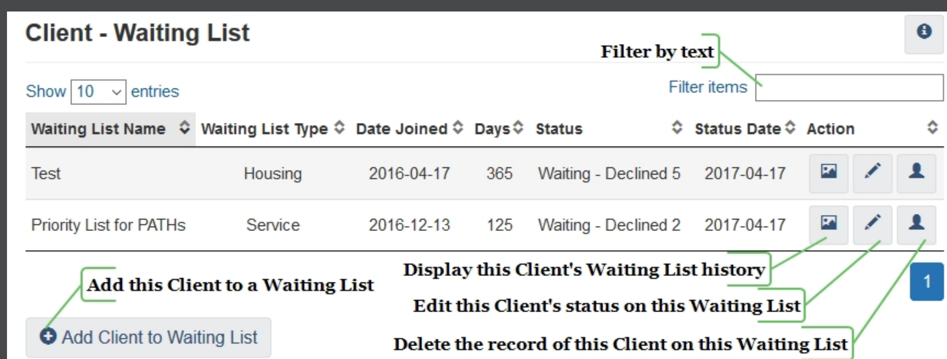
Open a Client File

If you don't already have a Client File open, open one. See Open a Client File (on page 1)

Go to the Client Waiting List Screen

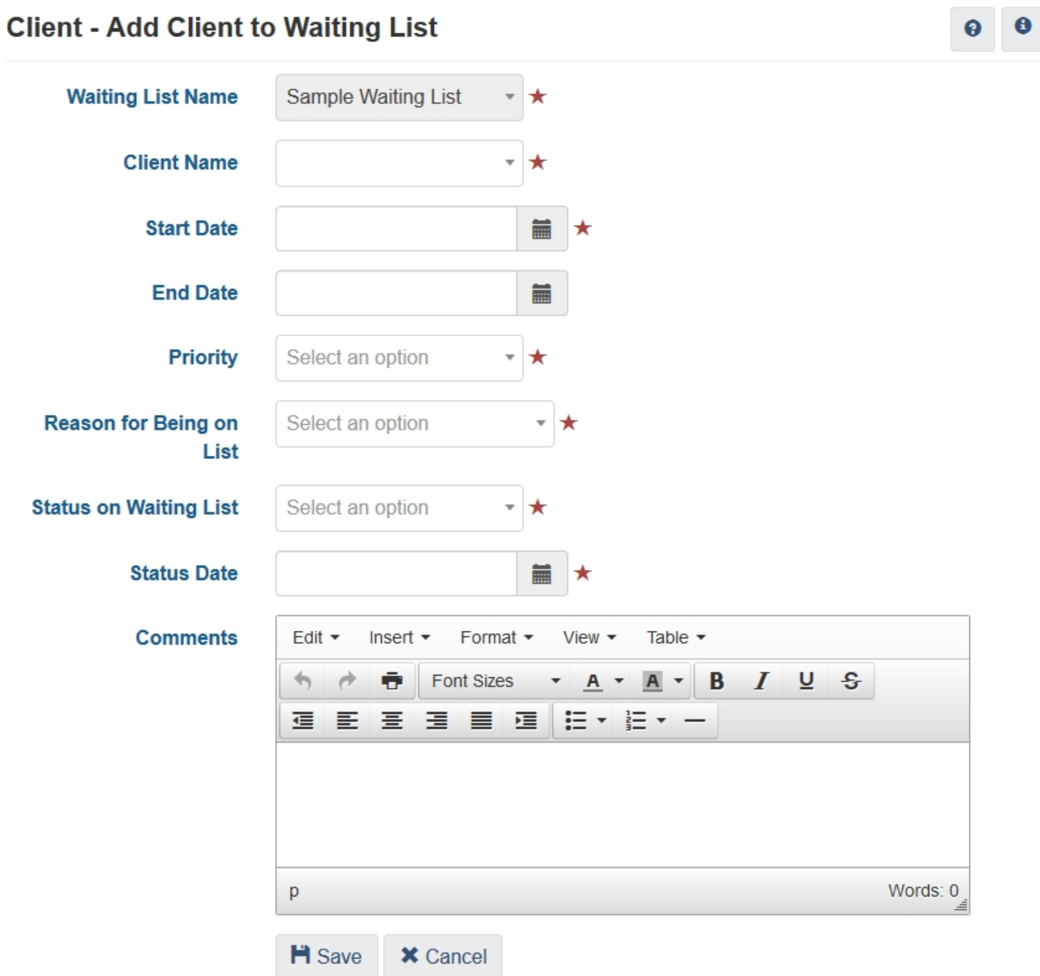
1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **WAITING LISTS**

Now you're on the **Client - Waiting List** Screen



Add Client to a Waiting List

1. Click on the **ADD CLIENT TO WAITING LIST** button.



2. Select the Waiting List you would like to add the Client to. If you arrived here from **Manage Clients Screen**, this is pre-filled.
3. Select the name of the Client you would like to add. If you arrived here from **Client Waiting List Screen**, this is pre-filled.
4. Verify the Start Date. This is the date on which the Client is added to the Waiting List.
5. Leave the End Date blank. You will add a value here when the Client is removed from the Waiting List.
6. Complete all the remaining mandatory and optional fields, as instructed by your supervisor.
7. Click **SAVE** when done

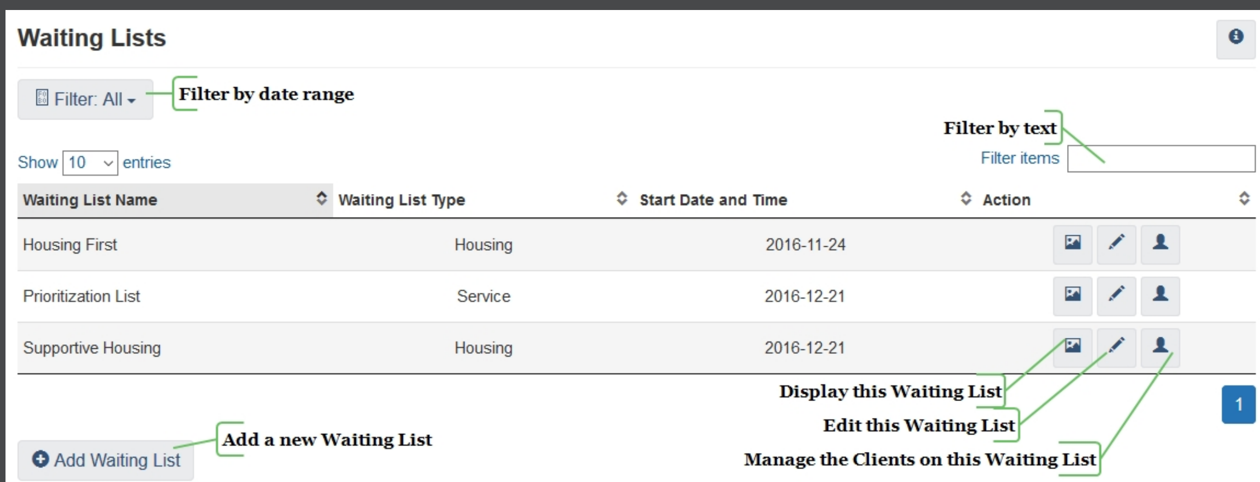
Now you're on the **Manage Clients Screen**

How To: Change a Client's Status on a Waiting List

Go to the Waiting Lists

1. Click on the **FRONT DESK MENU**
2. Click on **WAITING LISTS**

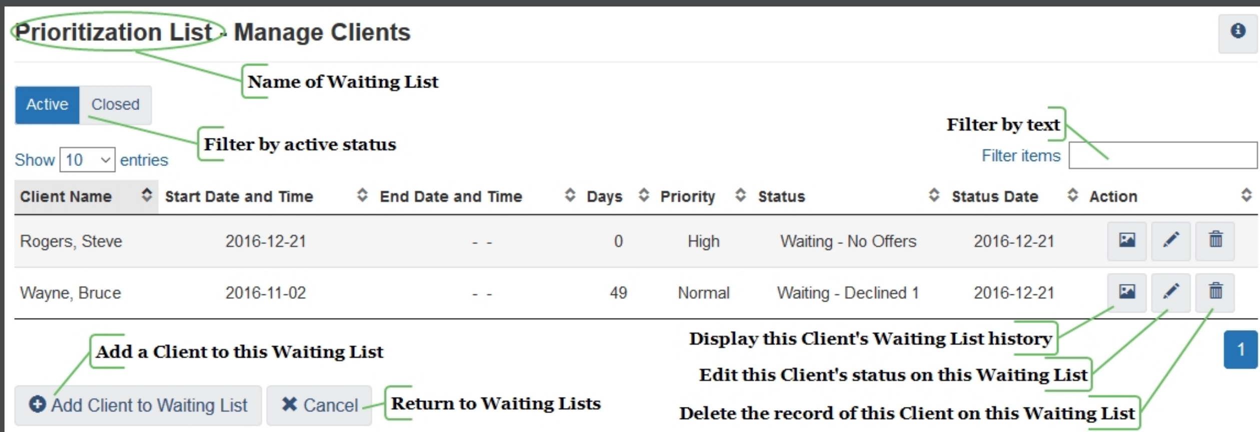
Now you're on the **Waiting Lists** Screen



Manage Clients

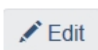
1. Click on the button

Now you're on **Manage Clients** Screen



You can also Open a Client File (on page 1) and use the **CLIENT MANAGEMENT MENU** to click on **WAITING LISTS** instead of using the Front Desk Menu.

Edit a Record

1. Click on  or  for the record you would like to edit

Now you're on the **Edit** Screen

Change a Client's Waiting List Status

1. Select a different option in the Status on Waiting List field
2. Verify that the Status Date is accurate
3. Click **SAVE** when done, or **CANCEL** to go back

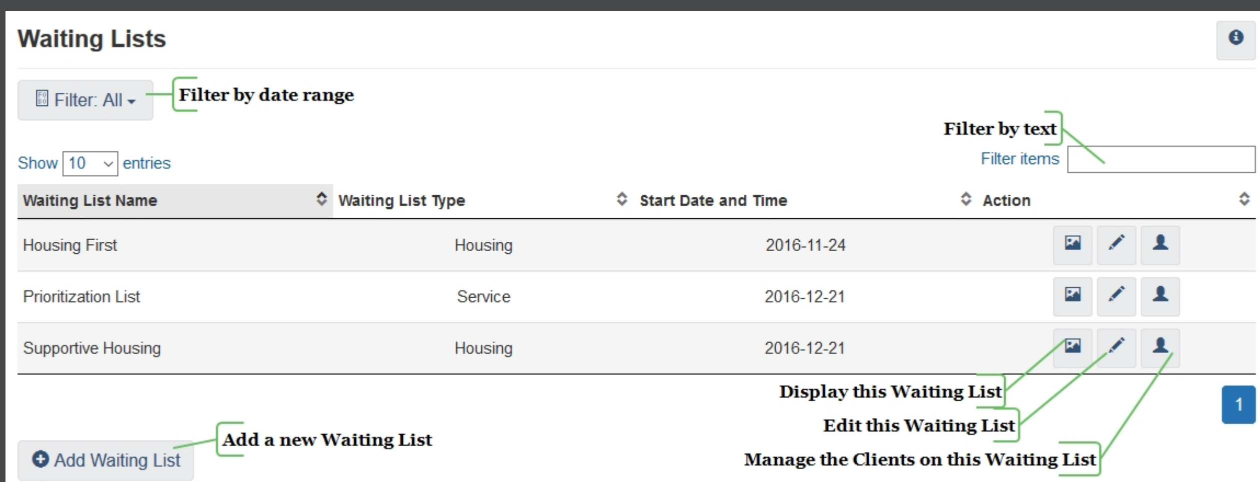
Now you're on the **Manage Clients** Screen

How To: Remove a Client from a Waiting List

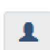
Go to the Waiting Lists

1. Click on the **FRONT DESK MENU**
2. Click on **WAITING LISTS**

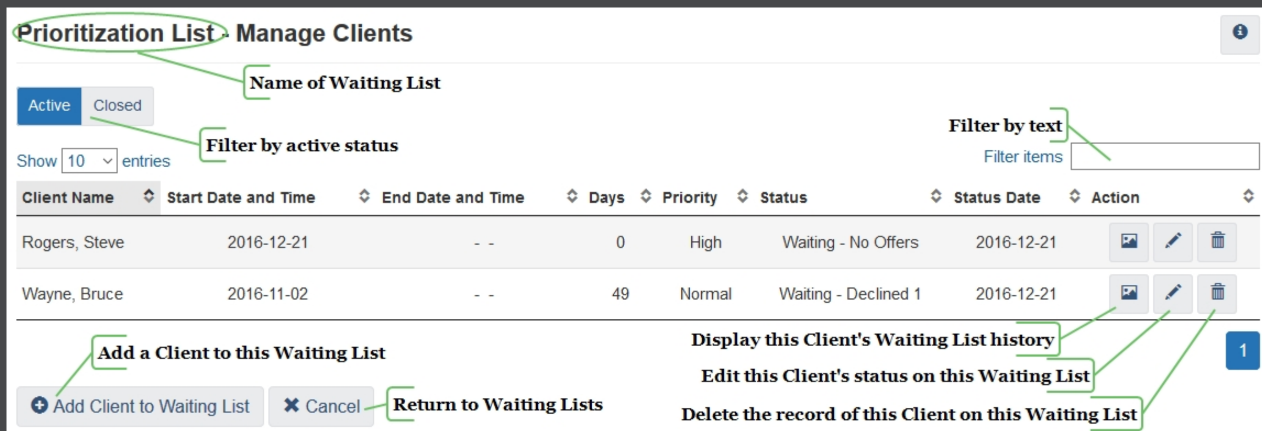
Now you're on the **Waiting Lists** Screen



Manage Clients

1. Click on the  button

Now you're on **Manage Clients** Screen



You can also Open a Client File (on page 1) and use the **CLIENT MANAGEMENT MENU** to click on **WAITING LISTS** instead of using the Front Desk Menu.

Edit a Record

1. Click on or Edit for the record you would like to edit

Now you're on the **Edit** Screen

Remove a Client from the Waiting List

1. Add a value to the End Date field
2. Optional: also select a Status on Waiting List option to reflect the reason why they are being removed from the Waiting List. If you do so, ensure that the Status Date matches the End Date.
3. Click **SAVE** when done, or **CANCEL** to go back

Now you're on the **Manage Clients** Screen