HH12: HOW TO ADD A HOUSING PLACEMENT RECORD

> A Housing Placement record should be added the day the client is accepted onto your caseload. A corresponding Case Management file should also be opened with a session activity type of 'BNL Referred' if the client was referred from Coordinated Access.

1. Search for the client and click on their name to enter their record.

2. From the Client Management drop-down menu, select Housing Placements.

   Client Management ▾

3. Click the Add Housing Placement button.

   ⊕ Add Housing Placement

4. Caseworker field: Select the main staff person assigned to assist the client. In general, if you are creating the record, you should be the main person assigned to their case file.

5. Housing Type(s) Sought field: Select the housing types the client is looking for.

6. Search Started Date: Enter the day you started working with the client.

7. Target Date: Optionally, enter the date you hope to have the client placed by.

8. Program: This field will have Reaching Home automatically selected to indicate Housing Support program is RH funded.

9. Click the Start Housing Placement button.

   💾 Start Housing Placement