



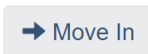


HT14: HOW TO SECURE A UNIT / RECORD A CLIENT MOVE IN

HOW TO SECURE A UNIT



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.
3. Under the Action column, select the Manage button for the record you previously opened: 
4. Click on the Add and secure a housing unit button: 
5. Select the Housing Types the client is looking for.
6. Select the Status (condition) of the Unit.
7. Enter the address information for the housing unit.
8. The Geographic Region field is pre-populated with your community. Only change this if the unit is in a different community.
9. Enter the expected move-in date.
10. Click the Save and Secure button: 

HOW TO MOVE A CLIENT IN TO A UNIT

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.
3. Under the Action column, select the Manage button for the record you previously added and secured a housing unit to: 
4. Click the Move In button: 
5. If a Warning notification appears at the top of the Move In screen, you will need to add an end date for the client's open housing history record. Add the end date to the Active Housing End Date field.


Warning!

The client has an active housing history record, you can proceed with the move in, but are required to provide an end date for the active housing history record. [Go to active client housing record](#)


Active Housing End Date  

6. Enter the rent amount (optional).
7. Enter the date when the client moved in to the unit.
8. Set the Use Exact Follow-up Date to Yes.
9. In the Months Until Follow-Up field, enter the date three months after the Move In date. This will generate a reminder for the first required follow-up.

Move In

 **Client Housing Placement Conflict**

This client has an active housing placement. Before proceeding please close off the previous placement. [Go to active housing placement](#)



ATTENTION: You will not be able to move a Client in if they have another open placement with a status of 'Moved Into Housing'. If they do, contact the user who created it or the HIFIS Help Desk to have the placement closed.

10. Click the Move In button: 