
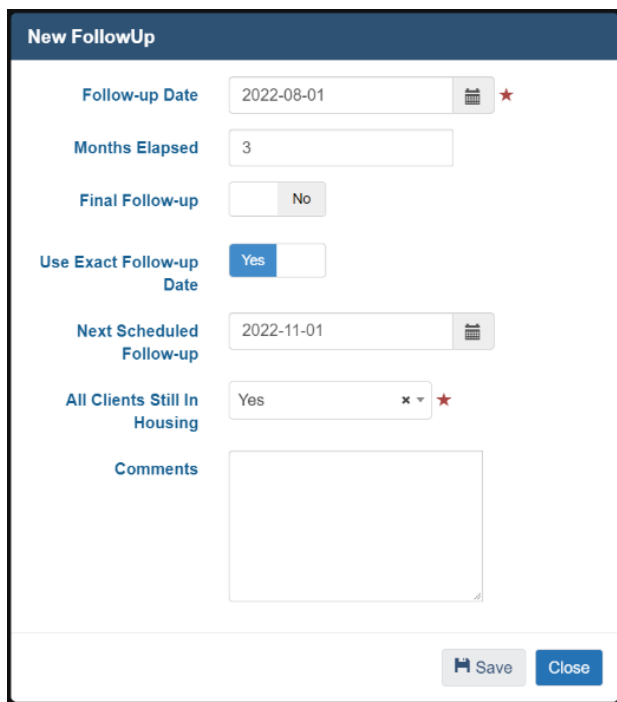


HT18: HOW TO ENTER A HOUSING LOSS PREVENTION FOLLOW-UP

1. Navigate to the House Loss Prevention List screen to view client Follow-Ups that are Upcoming or Overdue:
 - Selecting Front Desk > Housing > Housing Loss Prevention
 - Use the Past Due/Upcoming Follow-ups to view records that require attention.
2. From the Housing Loss Prevention List, locate the Housing Loss Prevention record that you want to follow up on and click on the Manage button under the Action column.
3. On the Follow-ups tab, click the Add Follow-up button: 
4. Follow the data entry steps below for the applicable scenario, then click the Save button.

Scenario 1: Client/family still living in housing unit

- a) Months Elapsed = Leave at system calculated number
- b) Final Follow-up = No (unless client is being discharged)
- c) Use Exact Follow-up Date = Yes
- d) Next Scheduled Follow-Up = 3 months from recorded Follow-up Date
- e) All Clients Still in Housing = Yes



The screenshot shows a 'New FollowUp' form with the following fields and values:

- Follow-up Date:** 2022-08-01 (calendar icon, red star)
- Months Elapsed:** 3
- Final Follow-up:** No
- Use Exact Follow-up Date:** Yes
- Next Scheduled Follow-up:** 2022-11-01 (calendar icon)
- All Clients Still In Housing:** Yes (dropdown arrow, red star)
- Comments:** (empty text area)

At the bottom right, there are 'Save' and 'Close' buttons.

Scenario 2: Unable to determine if client/family is still living in housing unit

- a) Months Elapsed = Leave at system calculated number
- b) Final Follow-up = No
- c) Use Exact Follow-up Date = Yes
- d) Next Scheduled Follow-up Date – 3 months from recorded Follow-up Date
- e) All Clients Still in Housing = Unable to Contact OR Client Declined Follow-up
- f) Click the Save button

The screenshot shows a 'New FollowUp' form with the following fields and values:

- Follow-up Date: 2022-08-01
- Months Elapsed: 3
- Final Follow-up: No
- Use Exact Follow-up Date: Yes
- Next Scheduled Follow-up: 2022-11-01
- All Clients Still In Housing: Unable to Contact
- Comments: (empty text area)

Buttons at the bottom: Save, Close



This will leave the Housing Loss Prevention record open and remind you to attempt another follow up in three months.

Scenario 3: Some family members not living in housing unit

- a) Months Elapsed = Leave at system calculated number
- b) Final Follow-up = No
- c) All Clients Still in Housing = No
- d) Clients That Have Left Housing = Click on the field box to select the family members that left
- e) Reason Left Housing = Select the Reason for the family member no longer living in the unit
- f) Date Left Housing = Select the date the family member no longer living in the unit left
- g) Is Housed Elsewhere = Select the appropriate option for the family member that left. If unknown, select No.
- h) Click the Save button



This will keep the initial Housing Loss Prevention record open for the remaining family members living in the unit.

If the Family Head has left, you will be prompted to select a new head of household when adding the Follow-Up record.

Scenario 4: Client/family not living in housing unit

- a) Months Elapsed = Leave at system calculated number
- b) Final Follow-up = Yes
- c) All Clients Still in Housing = No
- d) Clients That Have Left Housing = Click the + button to insert the client(s) that no longer live in the unit
- e) Reason Left Housing = Select the Reason
- f) Is Housed Elsewhere = Select the appropriate option
- g) House Now Available = Yes
- h) Click the Save button



This will close the Housing Loss Prevention record.

Depending on what occurs with the client and your involvement, you may do one of two things, or neither:

- a. Open a new Housing Placement record; OR
- b. Add a new Housing History record and then a Housing Loss Prevention record.

The screenshot shows a 'New FollowUp' form with the following fields and values:

- Follow-up Date:** 2022-08-01
- Months Elapsed:** 3
- Checking this will end this housing placement:** (Red text)
- Final Follow-up:** Yes
- All Clients Still in Housing:** No
- Clients That Have Left Housing:** John, Rita
- Reason Left Housing:** Too Many Guests / Problem...
- Date Left Housing:** 2022-07-21
- Is Housed Elsewhere:** No
- Unit Now Available:** Yes
- Comments:** (Empty text area)

At the bottom right, there are 'Save' and 'Close' buttons.