
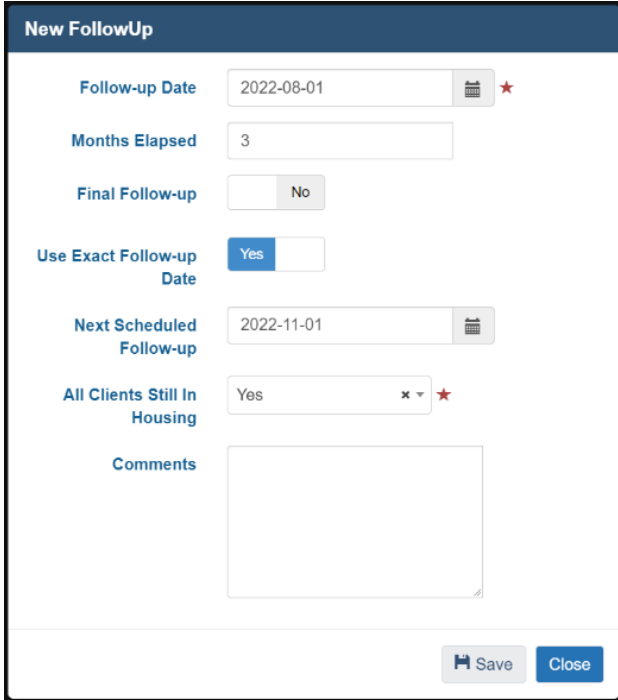


HT15: HOW TO ENTER A HOUSING PLACEMENT FOLLOW-UP

1. Navigate to the House Placement List screen to view client Follow-Ups that are Upcoming or Overdue:
 - Selecting Front Desk > Housing > Housing Placements
 - Use the Filter Options box if desired to filter for your clients.
2. From the Housing Placement List, locate the Housing Placement record that you want to follow up on. Click on the Manage button under the Action column for that record.
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 (with a calendar icon and a red star)
- Months Elapsed: 3
- Final Follow-up: No
- Use Exact Follow-up Date: Yes
- Next Scheduled Follow-up: 2022-11-01 (with a calendar icon)
- All Clients Still In Housing: Yes (with a dropdown arrow and a 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

New FollowUp

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]


Save Close



This will leave the Housing Placement 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 Placement 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 initial Housing Placement record.

If you assisted in placing the client/family in a new housing unit, or if the client/family found and moved into new housing on their own, start a new Housing Placement and record a Move In.

New FollowUp

Follow-up Date 2022-08-01  ★

Months Elapsed 3

Checking this will end this housing placement


Final Follow-up Yes

All Clients Still in Housing No x v ★

Clients That Have Left Housing x John, Rita + - ★

All clients in this housing placement have left housing. This will end the housing placement.

Reason Left Housing Too Many Guests / Problem... x v ★

Date Left Housing 2022-07-21 

Is Housed Elsewhere No

Unit Now Available Yes

Comments