Housing Provider Job Aid 

| **Processing Referrals** | | |
| --- | --- | --- |
| **Processing Referrals** | **Enrollment/Accept Referral** | |
| 1. Click *Referrals*   A blue background with white text  Description automatically generated with low confidence   1. Go to the *Pending Tab.* Click Edit next to the applicable client.      1. Update Status to Pending-In Process.   A screen shot of a computer  Description automatically generated   1. If it’s determined client is ineligible, update referral status *Denied*. 2. To accept the referral, navigate to the client file and continue to the next section. | 1. Navigate to client file, then click *Programs.*   A blue background with white text  Description automatically generated   1. Click dropdown next to the applicable program.      1. Ensure “Program Placement a result of Referral provided by..." toggle is enabled.   A red and black text  Description automatically generated   1. Turn on toggle for household members who will be living with the head of household. | 1. Click Enroll.   A close-up of a sign  Description automatically generated   1. Complete Enrollment Screen.   A screenshot of a computer  Description automatically generated   1. Unit assignment will happen automatically. |

| **Unit Transfer** | | | |
| --- | --- | --- | --- |
| Clients may need to move to another unit due to reasonable accommodations, safety issues, unit repairs, etc. Follow these steps to transfer a client to another unit.   1. Go to the *Units/Beds Tab*.      1. Click edit next to the current unit.      1. Add an End Date to the Current Unit. | | | 1. Assign the Client to a New Unit. The Start Date should be the first night the client will sleep in the unit.     Graphical user interface, application  Description automatically generated |