

## ADVOCATE QUICK GUIDE: FOUR STEPS TO SUCCESS

1. Collect all the client's basic information (name, SSN, birthdate, household size, income, where they want to live, etc – everything that typically is asked on housing applications). We call this the **Client Profile**. You can use our handy **Data Collection Form** for this purpose.
2. Sign onto our website and check if your client's info has already been entered into the system by someone else. If the **Client Profile** is already in our system, update the info if needed. If the **Client Profile** is not in our system, you will need to type all the info from the **Data Collection Form** onto the **Client Profile pages** on our website.
3. After you've created the **Client Profile**, use our handy search page to do your first search and also to set up a **Repeating, Automatic Search**. Since waitlists open and close all the time, this search may produce a different list of housing possibilities every week. We call these the **Search Results**. Currently we run the search every weekend so each Monday, you will be able to check the **Search Results** for newly available housing options.
4. The next step is different depending on the type of subscription you have.
  - With a **free subscription**, you'll be able to view a list of places that are currently taking applications, as well as addresses and phone numbers to call to request applications. Our site will show you a much larger set of options that most of you will ever be able to locate on your own, and make you an instant expert in the field of housing search. It also saves you hundreds of phone calls and saves you and your client hours of time.
  - With a **paid subscription**, you will be able to generate **Pre-Filled Housing Applications** to PRINT and MAIL! If you take this step, you can also
    - **print** a list of all the applications that have been sent, and when they were sent.
    - **remove** a client from waitlists. This helps your other clients get housed faster: with cleaner waitlists, most housing providers can fill vacancies much faster.
    - **update** many waitlists when the client has a change in address, family size, or amount of income amount.

### THE PICTURE GUIDE BELOW LEADS YOU THROUGH THE STEPS

#### STEP ONE - COLLECT THE CLIENT PROFILE INFORMATION

- A. Use our handy **Data Collection Form** to collect all the information needed to complete the housing applications. (This **Data Collection Form** should be listed in your browser Favorites as "2. HW Data Collection form".) *Go over the whole form with the client to make sure everything has been correctly answered. If a question is not applicable to your client, then write "N/A" as the answer.* Your housing applications will likely be rejected if you leave answers blank, so it is crucial to get every piece of information. NOTE: You may find that filling out this form can take several weeks, as the questions are very detailed and involve remembering the phone number for an old landlord, your checking account number, etc. etc.

**HW** .net v5.8

HOUSINGWORKS DATA COLLECTION FORM  
Use only to collect client information prior to using the *One Stop* form

**SECTION ONE: ITEMS MARKED WITH A TRIANGLE ARE REQUIRED unless you don't have a SSN or Middle Name**

▶ First Name \_\_\_\_\_ Middle \_\_\_\_\_ *also supply -> M.I.*

▶ Last Name \_\_\_\_\_ SSN \_\_\_\_\_ Alien Reg. No. \_\_\_\_\_

▶ Date of Birth \_\_\_\_\_ Age \_\_\_\_\_ ▶ Mother's last name before she was married \_\_\_\_\_

▶ Mailing Address or P.O. Box (*where you wish to receive offers of housing*): \_\_\_\_\_

**STEP TWO - CHECK IF THE CLIENT PROFILE HAS ALREADY BEEN CREATED BY SOMEONE ELSE**

STEP ONE: Go to [www.housingworks.net](http://www.housingworks.net). (If you've had our training, this link should already be in your Favorites as 1. HW Website or 1. HousingWorks Welcome Page.) Once you get to [www.housingworks.net](http://www.housingworks.net), click the link: "Enter HousingWorks"



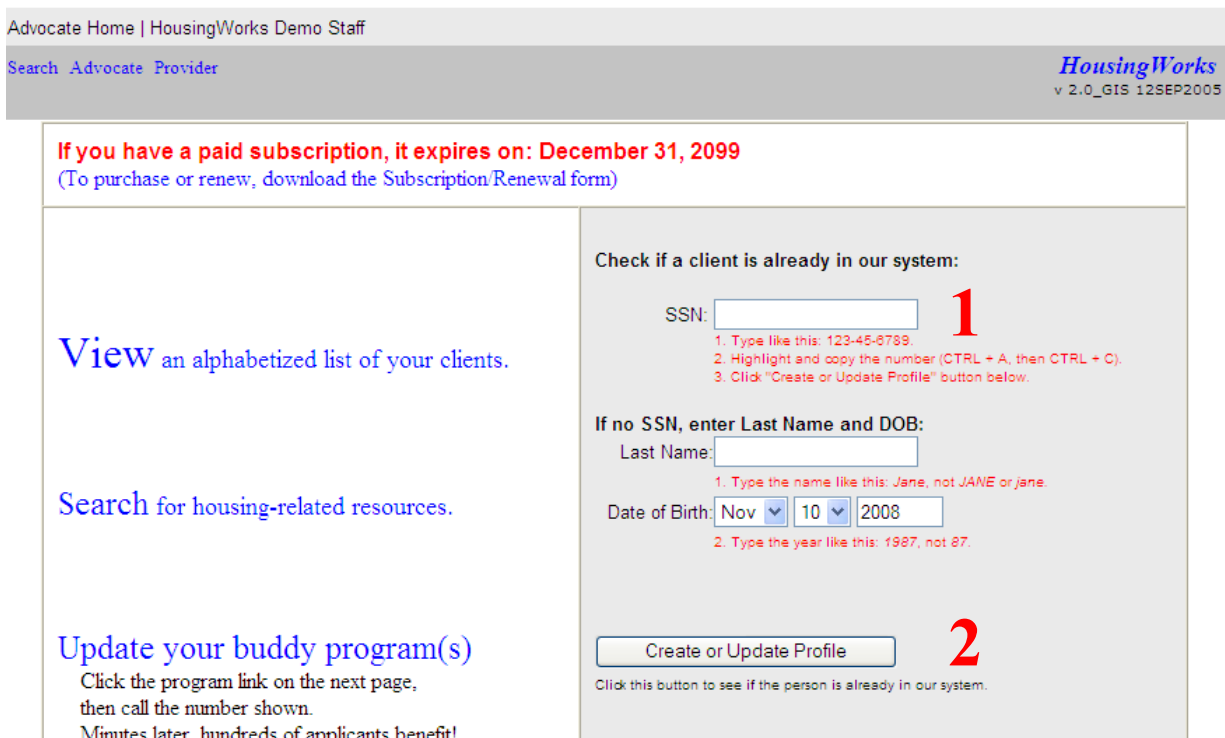
On the next page, click the link:

"Registered Housing Advocate"



Sign in with your ID and password. Your boss should have a copy of this. Or you can contact HousingWorks at [support@housingworks.net](mailto:support@housingworks.net) or (617) 504-0577 to ask for it.

On the next page, enter the client's Social Security Number (1) then click the Button: **Create or Update Profile** (2).



- ✦ **If the client is already in our database**, you will see the page below: just enter the applicant's password (the *mother's maiden name* or the word *housingworks*) **If the password works, you will be taken to a page where you can**

- 1) review and update the information that was put in, and
- 2) start to search and apply for housing.(skip Step Two and go directly to Step Three)

[Search](#) [Advocate](#) [Provider](#) **HousingWorks**  
 Authorize

To access **John D. LaBella's** profile, please enter their client password below.

- ✦ **If the client is not already in the database**, you'll see a message. If you see this message you will need to take the **information from the Data Collection Form** and enter it into the website. Follow the instructions on each page, then click the "Next Page" button at the bottom of each page to save that info and move forward.

Create New Profile | HousingWorks Demo Staff **HousingWorks**  
v 2.0\_GIS 12SEP2005  
[Search](#) [Advocate](#) [Provider](#)

No matching client was found in our database. Would you like to create a new HousingWorks profile for this client?

- ✦ **Once you've finished creating the Client Profile, you'll see this page. Click green link #5 to start the *Repeating, Automatic Housing Search*.**  
 Note: You can return to this page at any time to add or update information (for example, the client income changes, the client is willing to search in a different area, or the client gets married or divorced, making the household size change.)

Client Profile Menu | HousingWorks Demo Staff Active Client: **Blah Test**  
[Search](#) [Advocate](#) [Provider](#) **HousingWorks**  
v 2.0\_GIS 12SEP2005

## Update Client Information

1. [View the client's entire Profile](#)
2. [Print out Authorizations to mail with every application](#)
3. [List of Client's Advocates - Use this link to remove a client from your list.](#)

**Update the client's profile by clicking one of the links below.**

1. Client Name, Social Security Number, Birthdate, and Password - check to make sure this page is complete
2. Client Address, Phone, and Emergency Contact - update the contact information for this client
3. Client's Household Size, Income, and Assets - update as the household size and financials change
4. Client's Housing History - update as the client moves
5. Client's [Search](#) Choices (change the search or force it to happen immediately)
6. [Update Client Information](#) - Click here to confirm all changes and return to the Home Page



**STEP THREE – SET UP THE *REPEATING, AUTOMATIC SEARCH***

Complete sections, A, B, C, and D and then click the button: **Find Housing**. **Important! you should check two boxes in the blue section:**

- *Rental Assistance Voucher AND Family/Individual Housing*
- *Rental Assistance Voucher AND Elder/Senior Citizen Housing*
- *Rental Assistance Voucher and Wheelchair Accessible – No Steps Unit*

This will locate all subsidized housing options. If the client already has a voucher, just check the Family/Individual checkbox. *if you check only the Rental Assistance Voucher box, you won't get any results at all*

**I. Search for Open Waitlists**

**A. Look for housing within a**  **mile radius of zip code:**  [Find other zip codes here](#)

**B. What kinds of housing?**  
*Feel free to check as many options as you like.*

PERMANENT HOUSING or RENTAL ASSISTANCE:	SHELTER/TRANSITIONAL
<input type="checkbox"/> Rental Assistance Voucher	<input type="checkbox"/> Adult Single Females or Women with Children
<input type="checkbox"/> Assisted Living / Special Needs / Nursing Home	<input type="checkbox"/> Adult Single Males only
<input type="checkbox"/> Congregate Housing Opportunities	<input type="checkbox"/> Battered Women / Men's Programs
<input type="checkbox"/> Deaf Independent Living	<input type="checkbox"/> Dealed Shelter / Transitional Programs
<input type="checkbox"/> Dealed	<input type="checkbox"/> Developmentally Disabled Programs
<input type="checkbox"/> Elder/Senior Citizen Housing	<input type="checkbox"/> Ex-offender Programs
<input type="checkbox"/> Ex-offender Housing	<input type="checkbox"/> Family Programs
<input type="checkbox"/> Family/Individual Housing	<input type="checkbox"/> HIV+ Transitional
<input type="checkbox"/> HIV+ Housing	<input type="checkbox"/> Immigrant without documented status
<input type="checkbox"/> Housing with Educational Component	<input type="checkbox"/> Shelter plus Care (homeless & disabled)
<input type="checkbox"/> Homeownership Opportunities	<input type="checkbox"/> Singles (any/either gender)
<input type="checkbox"/> Immigrant without documented status	<input type="checkbox"/> Substance Use Recovery Transitional
<input type="checkbox"/> Mobile Home Parks	<input type="checkbox"/> Teen - pregnant / parenting
<input type="checkbox"/> Permanent Housing-Disability (visiting services)	<input type="checkbox"/> Teen - Runaway/Castaway/Custodial/Behavioral
<input type="checkbox"/> Permanent Sober ("Oxford House" model)	<input type="checkbox"/> Temporary Sober Wet Shelter Programs
<input type="checkbox"/> Permanent Housing-Disability (live-in services)	<input type="checkbox"/> Veterans Shelter/Transitional
<input type="checkbox"/> Veterans Housing	<input type="checkbox"/> Wheelchair Accessible / No-Steps Buildings
<input type="checkbox"/> Wheelchair Accessible / No-Steps unit	

**C. Do you need a place with public transportation?**  **Yes**

**D. What size unit(s)?**

*Use the CONTROL key + mouse-clicks to select more than one unit size*

Not Yet Assigned  
 Bed  
 6 Bedroom  
 5 Bedroom  
 4 Bedroom  
 3 Bedroom  
 2 Bedroom  
 1 Bedroom  
 Studio  
 SRO

**This search will repeat automatically, every weekend. Since waitlists open and close, you should check the results once a week to see if any new housing options have appeared. Here's how you do that:**

1. Return to the website and sign on with your ID and password:
2. Click the link: "View an alphabetized list of your clients"

Advocate Home | HousingWorks Demo Staff

Search Advocate Provider

**HousingWorks**  
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If you have a paid subscription, it expires on: December 31, 2009

(To purchase or renew, download the [Subscription/Renewal form](#))

View an alphabetized list of your clients.

Search for housing-related resources.

Update your buddy program(s)

Click the program link on the next page, then call the number shown. Minutes later, hundreds of applicants benefit!

**Check if a client is already in our system:**

SSN:

1. Type like this: 123-45-6789.  
2. Highlight and copy the number (CTRL + A, then CTRL + C).  
3. Click "Create or Update Profile" button below.

**If no SSN, enter Last Name and DOB:**

Last Name:

1. Type the name like this: Jane, not JANE or jane.

Date of Birth:

2. Type the year like this: 1987, not 87.

Create or Update Profile

Click this button to see if the person is already in our system.

You'll see a list of all the clients you put into the system. (They are alphabetized by last name ) Click on the number at the far right and this will show you the newest results. The most recent housing openings will always show at the top of the list. Note: if you need to change any part of the client profile (or if you want to change the search options), you can click on the name of the client instead.

◀ Displaying 1...30 of 295 clients ▶

☐ Archive Name	ID	Birthdate	Social Security Number	Password	Currently Open Matching Programs (COMP)
☐ <a href="#">Julian F. Caramel</a>	7953	12/10/1961	107583589	housingworks	<a href="#">12</a>
☐ <a href="#">Abbie Lincoln</a>	7953	12/10/1961	123456789	housingworks	<a href="#">11</a>
☐ <a href="#">Jerry D. Gomez</a>	8598	06/17/1981	009343462	housingworks	<a href="#">1</a>
☐ <a href="#">Ellbert Potato-Head</a>	7681	10/05/1950	010420963	housingworks	<a href="#">2</a>
☐ <a href="#">Bruce P. Bruce</a>	8495	04/06/1958	013489384	housingworks	<a href="#">3</a>

**STEP FOUR – GENERATE APPLICATIONS FOR YOUR CLIENTS**

**When you’re viewing the list of places to apply, take the following steps:**

1. Shorten the list to the best matches read the instructions in blue and red ink just below this box
2. Click the **Show Me** button
3. Scroll down the page to view the results. Don’t worry if they all say “no vacant units” If a housing program appears on this list, it means the waitlist is open, you are probably eligible and that they are taking applications.
4. If you have the ability to generate the pre-filled housing applications, remember that you’ll need to enter a password to do that. *This is not the client’s password but your own private password, associated with your ID.*

Search Results | HousingWorks Demo Staff      Active Client: John D. LaBella

Home : *HousingWorks*  
v 2.0\_GIS 12SEP2005

**Applicant's Household Size = 3 | Applicant's Annual Income = \$ 30,969**

◀      Displaying 1...10 of 130 results      ▶  
Jump to page: 1 2 3 4 5 6 7 8 9 10 11 12 13

**The results below show all the open waitlists in the zip code area you asked for.** *The programs that have been updated in the last few days will show at the top of the list. Mainstream Benefits Applications (both State and Federal applications) will always appear at the bottom of the list, on the last few pages. **These results will change once a week.***

**First, make a choice from the box below then hit the Show Me Button.**

**1**                  **2**

**Fully Subsidized waitlists:** you will pay about 1/3 of your income as rent.  
- Applicants who do not have a mobile voucher will generally want to choose this option.

**Affordable waitlists:** the rent will be lower than market level.  
- Applicants with a voucher or a larger income will want to choose this option.

If you want a shelter or treatment program, just skip the box above and go right to the results below.

## WANT TO PRACTICE ON A CLIENT THAT IS ALREADY IN THE SYSTEM?

Here are some made up client profiles that you can use to search and (pretend to) apply for housing. The last name of all these clients is "Anon". The social security numbers are made up: Each client is set up to search a particular area, for both a 1BR or 2BR unit

Client Name	Client Social Security #	Client Password	Searches
Test P. Anon	987-65-4322	anonac	the 01840 area
Test K. Anon	999-63-1234	smith	the 01852 area
Test Q. Anon	999-93-1234	housingworks	the 01970 area
Test T. Anon	999-90-1234	anona	the 02115 area
Test J. Bnon	999-81-1234	demo	the 01103 area
Test M. Bnon	999-79-1234	housingworks	The 01602 area
Test E. Bnon	999-98-1234	anond	The 01202 area

## STEP FIVE (extra) – UPDATE WAITLISTS or PROFILES

### UPDATE PROFILES AND/OR WAITLISTS as a later step

#### UPDATE PROFILES

1. Go to: [www.housingworks.net](http://www.housingworks.net)
2. Click link: "Enter HousingWorks"
3. Click link: "Registered Housing Advocate"
4. Sign on with your ID and password
5. Click link: "View a list of clients"
6. Click on the name of the applicant you want to help
7. Click on the section of the profile that you want to update

#### TO UPDATE WAITLISTS

1. Go to: [www.housingworks.net](http://www.housingworks.net)
2. Click link: "Enter HousingWorks"
3. Click link: "Registered Housing Advocate"
4. Sign on with your ID and password
5. Click link: "View a list of clients"
6. Click on the name of the applicant you want to help
7. Find the "Home" link in the gray bar at the top of the page and click it – you will then see the SSN for the client on the right side of the page
8. Click the "Check Application/Waitlist" button
9. MAKE SURE YOU'VE SENT THE AUTHORIZATION FORM WITH EVERY APPLICATION, OR ELSE THE HOUSING PROVIDERS WON'T ACCEPT YOUR UPDATE!