

## 2. How to Transfer a Waitlist to HousingWorks

1. **If you have the following information on your waitlist**, you can just send it to HousingWorks for quick import.
  - a. the original date placed on waitlist;
  - b. client name, including middle initial or name if known
  - c. street and mailing addresses (one or both)
  - d. birthdate
  - e. phone number
  - f. current control number (we will keep your numbering conventions)
  - g. priority and preference ranking, if any
  - h. SSN
  - i. Annual income
2. **If you do not have all the preceding information**, then pull out all your applications, and then log on with your ID and password to the property you are building a waitlist for. Enter the SSNs (or last name and birthdate – one approach or the other) and click the “Update Application Status” button **(Steps 1 and 2 below)**

The screenshot shows the HousingWorks web interface. At the top, there is a header with the text "Housing Provider | Demonstration Housing Program" and navigation links "Search Advocate Provider". On the right side of the header, the "HousingWorks" logo is displayed with the version number "v 2.0\_GIS\_12SEP2005".

On the left side, there is a vertical menu with the following links: "Update program info", "Manage waitlists", "Walk-In screen", "Create/Update online applications", "Search for housing or housing resources", and "Change password".

The main content area is titled "To access a client, enter their" and contains the following form fields and buttons:

- "Social Security Number:" followed by a text input field, with a red "1" next to it.
- "-or-" separator.
- "Last Name:" followed by a text input field, with "and" to its right.
- "Date of Birth:" followed by three dropdown menus: "Jan", "29", and "2006".
- "Add to Waitlist" button with a dropdown menu showing "1BR Family/Individual 30% AMI".
- "Generate Application" button.
- "Update Application Status" button, with a red "2" next to it.

Create two piles of applications: those where applicants are already in the system, and those you will have to add to the system

If the applicant is already in the system, you can add them to your waitlist, and then click the “Edit” link by their name to enter the control number, the original date of application, any priority/preference, unit size desired, and any notes you wish to keep. Also enter waitlist codes that will help you at reporting time (See 2. Waitlist Codes.. .)

If the applicant is not already in the system, use your Quick Entry Form (should be set up in your Favorites (see 1. How to set up HousingWorks on your Computer) to enter them one after another, then return to [www.housingworks.net](http://www.housingworks.net), enter your ID and password, and place them on the waitlist.

Optionally, you can pay HousingWorks to do this for you. We are masters at our own system.