

4. Suggested Work Flow for Maximum Efficiency



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1. HOW TO HANDLE APPLICATIONS AS THEY COME IN:

- a. **Type the applicant's SSN (or last name and birthdates) into the webpage and copy it with your mouse; then click the *Update Application Status* button. Sort the applications into four piles based on what you discover:**
 - Pile 1: **Applicants who are not in the system at all.** (Put these applicants aside to process last, using the steps outlined in step "b")
 - Pile 2: **Applicants who are in the HW system and already on the waitlist and have been assigned a control number.** Generally, this happens because the applicant mailed you a second application by mistake or because they had a major change to their lives (ex: married with a new last name). In this event, you want to update the existing entry at this moment, and not put them on a waitlist twice! Be sure to add a note to each waitlist about what you did: "07/12/08: received duplicate app, used it to update info". Note: *If the applicant's name has changed, contact HousingWorks at 617-504-0577 or fax us at 617-536-8561 – you will need our help.*
 - Pile 3: **Applicants who are in the HW system, and already on the waitlist but have a control number of "0".** This happens when applicants use our system to generate an application; the system puts them on your waitlist with a control number of "0" to speed things up. *In this event, update their info immediately. Assign them a control number, a waitlist, a date and time, and a unit size **immediately!** Next, hit the "Home" link and enter their control number, then hit "Update Application Status" and add them to additional waitlists if appropriate.*
 - Pile 4: **Applicants who are in the HW system, but not yet on your waitlist.** The system will show their name, address, and phone, but no waitlist info. *In this event, click the "Home" link at the top of the page, paste their SSN or last name and birthdates back into the page, and hit "add to waitlist: Click the "Edit" link next to their name and assign them a control number, a waitlist, a date and time, and a unit size **immediately!** Next, hit the "Home" link and enter their control number, then hit "Update Application Status" and add them to additional waitlists if appropriate.*
- b. **Process that pile of applicants who are not in the system:**
 - If the applicant is not in our system already, put their information into the HousingWorks system using the *HW Quick Entry Form* (should be in your *Favorites* menu), When all of them have been entered on the Quick Entry Form, type their SSN (or last name and birth date) on the webpage and click "Add to waitlist". Click the "edit" link by their name, assign them a control number, a waitlist, a date and time, and a unit size **immediately!** If the applicant should go onto multiple waitlists, hit the "Home" link enter their control number on the page, then hit "Update Application Status" and add them to those additional waitlists. Be sure to type the same notes in each waitlist field, so that future waitlist reports will be complete.

2. HOW TO UPDATE WAITLISTS:

- a. Sort the waitlist updates into three piles depending on the nature of the update:
 - **Pile one: Applicants whose letters came back unopened:** Log on, enter the Applicant's Control # and click the "Update Application Status" button. Change the status, type "D" in the next box, click "Check All" button, enter a code* in the NOTES box for each waitlist, then click the "Update Status" button. *Codes are found in section 3 of this Guide.*
 - **Pile two: Applicants who wish to stay on the list with NO CHANGES:** Log on, enter the Applicant's Control #, and click the "Update Application Status" button. Enter a code* in the NOTES box for each waitlist, then click the "Update Status" button *Codes are found in section 3 of this Guide.*
 - **Pile three: Applicants with Changes of Address, Phone, Income, etc:** Log on, enter the Applicant's Control #, and click the "Update Application Status" button. Make the necessary changes. Enter a code* in the NOTES box for each waitlist, then click the "Update Status" button *Codes are found in section 3 of this Guide.*

OTHER HELPFUL STEPS - HOW TO:

3. ANSWER REQUESTS ABOUT WHERE PEOPLE STAND ON THE WAITLIST:

- a. Click the *Manage Waitlists* link. Click the *Hide Closed* button if it is not already engaged.
- b. Ask the client for their SSN and control number, address, phone, what waitlist they are on, and ask what unit size they applied for (they must give you most or all of this information or you can't legitimately answer their question over the phone). Walk-in must present picture IDs for all adults listed on application, with current address. (Avoids the danger of domestic violence victims being located by their abusers.)
- c. Select which waitlist they say they are on. Sort the waitlist by date, priority and/or preference, and unit size. Check the first page of the waitlist to see if the client is in the top 20 on that list. That is meaningful information.

4. STEER REQUESTS FOR APPLICATIONS TO:

- a. The application(s) online: http://www.housingworks.net/static/_____.pdf
- b. A housing advocate
 - Go to: <http://www.housingworks.net>
 - Click "Enter HousingWorks" and then "I'm looking for a Housing Advocate" link
 - Enter the zip code of caller and email them the results page pasted first into *notepad*, then into your email

5. REDUCE YOUR WORKLOAD BY MAILING LETTERS TO REFERRING AGENCIES:

Mail housing advocates a letter and ask them to use a registered Advocate ID and password to HousingWorks (there is no charge) rather than mail you housing applications completed by hand. Just give them our email address: support@housingworks.net and tell them to ask for an "Advocate ID and password". *This will save you some many hours of work, mailing applications and enter people into the system.*