Client New/Edit Housing Screen

Updated on October 2023

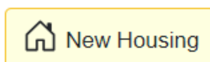
Home > Client Management (Search Client) > Housing > New/Edit Housing

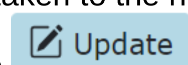
Business Purpose:

The **housing** screen in creation/edit mode displays the following section: **Housing Guidance module**, **Client Profile**, **Financial Info**, **Documents of Record**, **Housing Applications**, **Population-Based Support**, **Housing Stability Supports** for a specific program.

How to:

1. From the Housing in Client File screen click on:

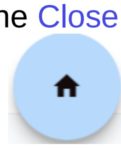
   - By clicking the 

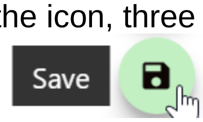
 button, the user will be taken to the screen for selecting a new program.
     - Select a program by clicking on a blue colored program name you will be taken to the housing screen in creation mode.
   - By clicking the 

 button, the user will be taken to the housing screen in edit mode.

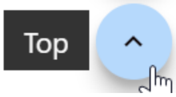
2. There are five buttons at the top of the housing screen in creation/edit mode:

   - Clicking the Back to Housing button will take the user to the Housing in Client File screen.
   - Clicking the Save button will save entered information and will create a housing file record.
   - Clicking the View History button will take the user to the Housing Record History Log screen.
   - Clicking the Print Blank Form button will open the SMIS Housing Checklist form in a new window tab.
   - Clicking the Close button will close the new housing screen.

3. There is another  icon at the bottom of the user's screen. By clicking on the icon, three more icons will open:

 - clicking the icon saves the entered information



- clicking the icon takes the user to the top of the page

- clicking the icon displays all housing sections links. By clicking on one of the links, the user will be taken there.

4. The housing screen in creation/edit mode is displayed in the following sections: **Housing Guidance module**, **Client Profile**, **Financial Info**, **Documents of Record**, **Housing Applications**, **Population-Based Support** and **Housing Stability Supports.**

5. **Housing Guidance** section. There are several links the user can follow to get more additional information in this section from other resources.

6. **Client Profile** section (not editable).

Client Profile

Please note: If you determine that the following items are incomplete or outdated, please go to the Initial Assessment and Triage page to update them.

Indigenous Identity	Military Status	Refugee Status	Triage Level	Support Needs Checklist
No	No	No		Mental Health Support, Physical Health Support

7. **Financial Info** section (editable). For example, the user can enter a value in the following fields:

   - **Estimated Monthly Income**
   - **Rent amount client feels they can afford**
   - **Last taxation year a client has field a return for**

8. **Documents of Record** section (editable). There are two sub-sections where the user can enter information:

   - **Identification Document on record**
     - Clicking the [Upload Identification Document] button will open an attachment pop-up window with an attachment to download the ID document.
     - Once the document Uploaded and saved the user will have three buttons:
       - ✓ Clicking the [View] button opens a document attachment in a new window where [Export] or [Go Back] buttons will be

displayed.

✓ Clicking the Edit button opens a pop-up window with an option to select a **Document Type*** and to Update a document attachment in the **File Name*** field by clicking on the Browse button. Clicking the Go Back button closes the window.

✓ Clicking the Archive button opens an Archive Attachment pop-up window with Confirm and Cancel buttons. Clicking the Confirm button archives Identification Document record and will not be displayed.

- **Housing Document on record**

  Clicking the Upload Housing Document button opens an attachment pop-up window with an attachment to download the housing document. After downloading and saving the document, the user will have three buttons: View, Edit, Archive.

9. **Housing Applications** section (editable). There are two sub-sections where the user can enter information:

- **Housing Application Form**
  - Clicking the Add Application button opens a new blank row with a few required fields for a new application record. The required fields are **App Name***, **Has Client Applied***, **Eligibility Date***, **Date Application Last Updated***, **App No***.
  - Clicking the icon opens a pop-up window for you to enter a note with up to 3,000 characters of text. After entering text, the system automatically saves it.
  - Clicking the icon opens the Delete Housing Application pop-up window with Confirm and Cancel buttons. Clicking the Confirm button deletes a Housing Application record.

- **Access to Housing (Rent-Geared to Income) Form**
  - There are several links that the user can follow to get more additional information in this sub-section from other resources
  - There are a few an optional question the user can answer by

clicking the **Yes**, **No**, **N/A** radio buttons.
- There is an optional field to enter a client's email address.
- Clicking on the ○ Yes radio button will activate calendar tab where the user can select a date in the **Notice of Assessment for current taxation year submitted to Access to Housing?** field.
- Clicking on the ○ Yes radio button will enable the following free text field next to **Who is the arrears with?**.

10. **Population-Based Support** section (not editable). There are several links that the user can follow to get more additional information in this section from other resources.

11. **Housing Stability Supports** section (not editable). There are several links that the user can follow to get more additional information in this section from other resources.

12. Each section has drop-down arrow, to maximize or minimize it.

Important Notes:

1. Each section title has a drop-down arrow that allows you to expand or collapse it.

2. Every time something is saved on a page, the system displays a pop-up message.