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HUD Section 811 PRA

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Case Manager

User Guide

socialserve.com®
December 2014

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HUD Section 811 PRA

Accessing the System

1. Go to www.socialserve.com/login and enter your username and password.

 - If you do not have a username and password, call 1.877.496.4954.

Login

* Username:
(typically a full email address)

* Password:

Session cookies must be enabled to use this service. [Forgot your password?](#)

[Click here to continue](#)



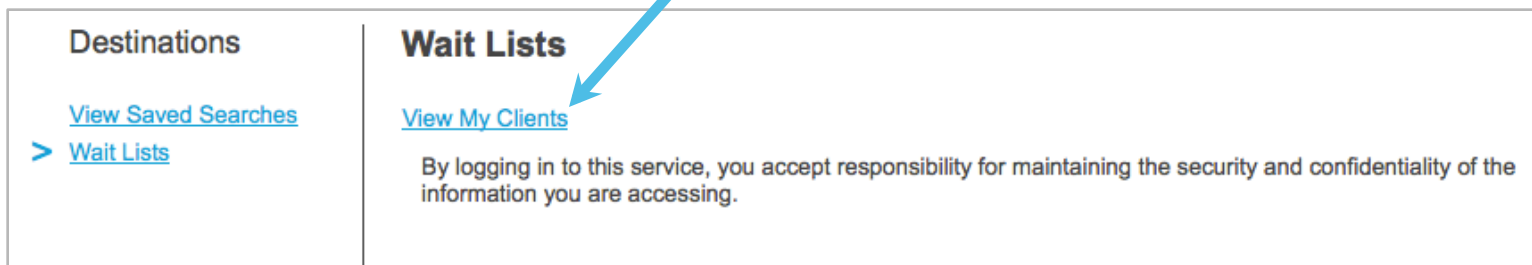
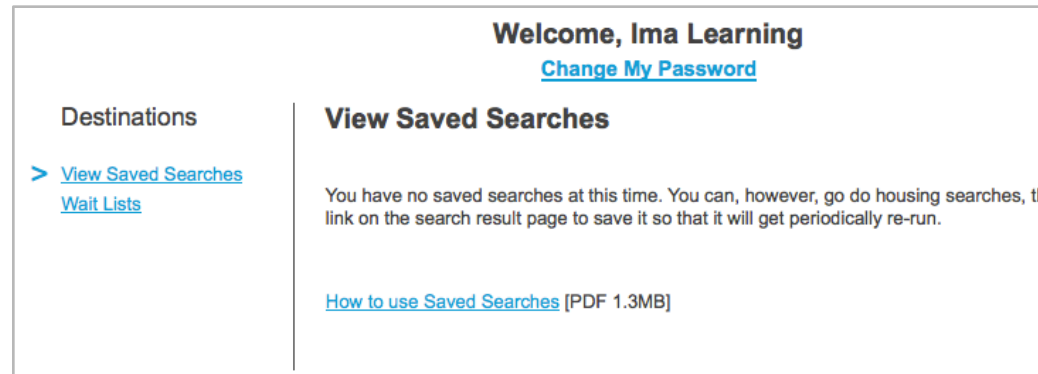
HUD Section 811 PRA

Accessing the System

- From your personalized welcome page, you can reset your password and access your client list.

To see your clients:

1. Under the “Destinations” heading, select [Wait Lists](#).
2. Select [View My Clients](#).

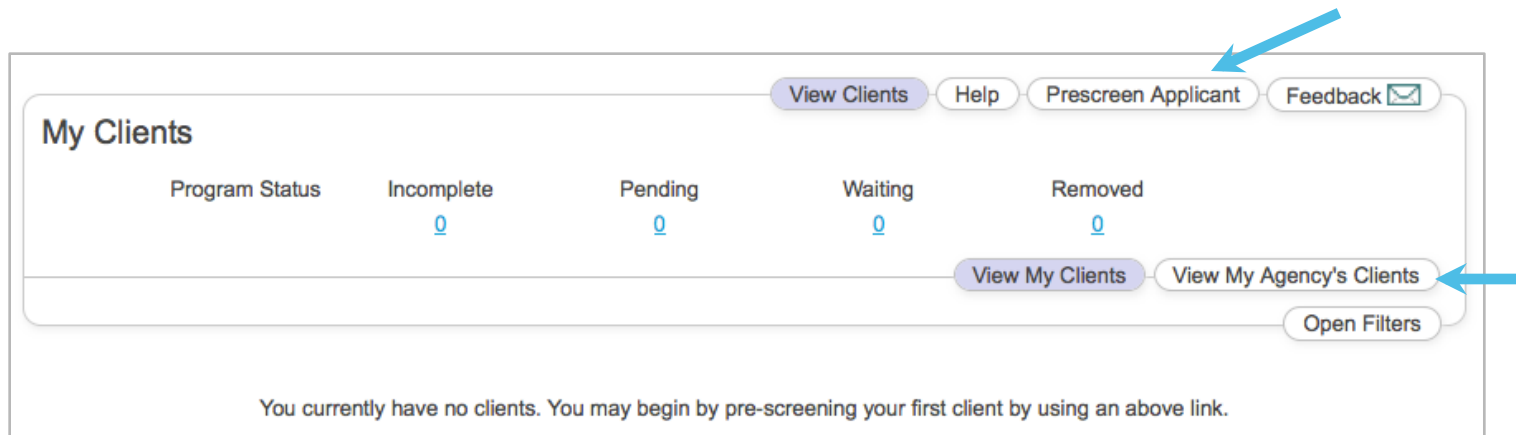




HUD Section 811 PRA

Finding Your Clients

- The “View Clients” / “My Clients” page lists clients who are assigned to you.
- If you do not have any clients listed, choose “Prescreen Applicant” to screen a new client.
- Or select “View My Agency’s Clients” to select someone already listed by your agency.



My Clients

Program Status	Incomplete	Pending	Waiting	Removed
	0	0	0	0

[View My Clients](#) [View My Agency's Clients](#) [Open Filters](#)

You currently have no clients. You may begin by pre-screening your first client by using an above link.



HUD Section 811 PRA

Prescreening for New Clients

- When screening a new client for program eligibility, enter accurate information for all fields.
- At the end of the form, click the button to continue.

Prescreening

Date of Birth (Ex. 5/19/1956) Household size

Household Income \$
(Dollar amount) Enter 9-digit Medicaid number

Yes No Is the applicant disabled as defined for HUD 811? [More Info](#)

Yes No Eligible for long-term care services?

Yes No Lifetime registered sex offender?

Yes No Convicted of Methamphetamine production on Federally Assisted property?

Which county(ies) are the applicant interested in living in? |

<input type="checkbox"/> Adams	<input type="checkbox"/> Alexander	<input type="checkbox"/> Bond	<input type="checkbox"/> Boone
<input type="checkbox"/> Brown	<input type="checkbox"/> Bureau	<input type="checkbox"/> Calhoun	<input type="checkbox"/> Carroll

Click a ? to view more information about a field

Be accurate! Only select counties where your client is willing to live



HUD Section 811 PRA

Completing an Application for New Clients

If your client is found to be potentially eligible for the program:

1. Select “Continue with application process.”
2. Enter information on all **three** application pages.

If a mistake is made after the page has been submitted, continue on to complete the application. Edit it after all three pages have been entered.

YOU CANNOT USE THE BACK BUTTON TO CHANGE THE APPLICATION:
 All three pages of the application must be entered before changes can be made.

Back button will NOT work

* = Required Field
 Do not use the back button; changes can be made after page 3

Application Progress: Page 1 of 3

Personal Data

First Name *	<input type="text"/>	Middle Name	<input type="text"/>
Last Name *	<input type="text"/>	Suffix	<input type="text"/>
Date of Birth *	<input type="text" value="01/01/1965"/>	Gender *	<input type="button" value="Select one"/>
Race ? *	<input type="checkbox"/> White <input type="checkbox"/> Black or African-American <input type="checkbox"/> American Indian or Alaskan Native		

Check all that apply

Enter accurate “Unit Size Needed”: eligibility rules apply



HUD Section 811 PRA

Enter Information about ALL Household Members

If the application information differs from what was entered on the prescreening you will get a **Warning**. Either correct the data or check “Dismiss this warning” if what you entered is correct.

Enter information for ALL household members even if they do not have income

* = Required Field

Do not use the back button; changes can be made after page 3

Warning

Please read the following warnings and then either make adjustments or click below to dismiss this warning.

- The household size indicated on the prescreening does not match the household information entered on the application. Please enter information for all members of the household.
- The total household income indicated on the prescreening does not match the household information entered on the application. Please enter accurate income for all members of the household.

Program eligibility is based on this information and will be verified *

Dismiss this warning

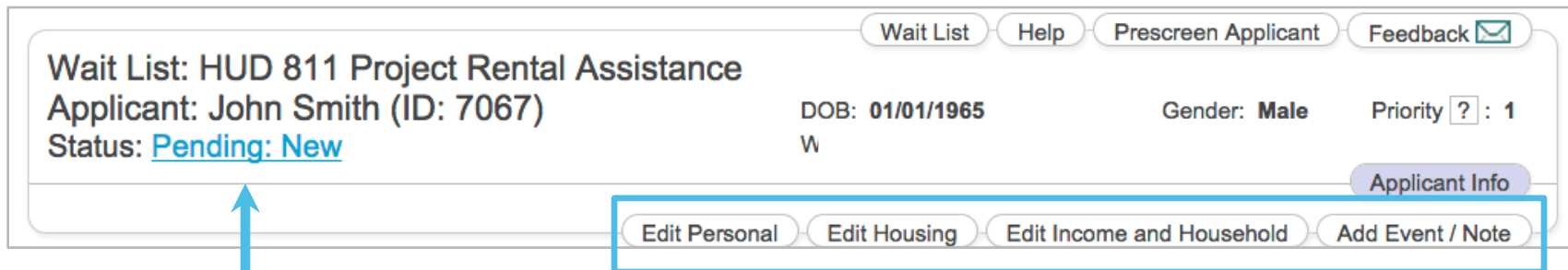
Application Progress: Page 3 of 3




HUD Section 811 PRA

Keeping Client Information Up to Date

Successful completion of the application will result in your client application in a “Pending: New” status.



Wait List Help Prescreen Applicant Feedback 

Wait List: HUD 811 Project Rental Assistance
Applicant: John Smith (ID: 7067)
Status: [Pending: New](#)

DOB: 01/01/1965 Gender: Male Priority : 1

W

Applicant Info

Edit Personal Edit Housing Edit Income and Household Add Event / Note

After your client is on the list, you can **edit and update** the application information using menu bar buttons.



HUD Section 811 PRA

Viewing Your Clients through the Dashboard

- The dashboard at the top of the “View Clients” and “View My Agency’s Clients” pages gives a quick summary of the make-up of clients assigned to you or your agency.
- Select links on the dashboard to filter the list and see your clients included in the summary count.

My Agency's Clients

View Clients | Help | Prescreen Applicant | Feedback

Program Status: Incomplete (0), Pending (15), **Waiting (5)**, Removed (5)

View My Clients | **View My Agency's Clients** | Assume Responsibility for Client(s)

Modify Filters

→ Displaying 5 applicants

Name ▲	Date of Birth ▲	Gender ▲	Applicant Status ▲	Applied ▲	Case Manager ▲	User ▲
Blaine, Sanjib	01/27/1966	Male	IL HUD 811 Project Rental Assistance Waiting: Approved	01/07/2014	Test Person1	test1@811
Dion, Don	12/07/1975	Male	IL HUD 811 Project Rental Assistance Waiting: Approved	05/08/2012	Test Person1	test1@811



HUD Section 811 PRA

Using Filters

- Additional filters are available to help you find client(s).

Minimize filters on page by using “Close Filters” button

The screenshot shows a filter interface with the following fields and controls:

- Type:** Radio buttons for Active (selected), Inactive, and Both.
- Status:** A dropdown menu currently showing "Waiting: Approved".
- ID:** An empty text input field.
- Last Updated:** A dropdown menu currently showing "Any Time".
- Last Name:** A text input field containing "Smith".
- First Name:** An empty text input field.
- Date of Birth:** An empty text input field.
- Limit clients:** An empty text input field.
- Case Manager Username:** An empty text input field.

At the bottom of the filter panel are two buttons: "Filter" and "Clear filters".

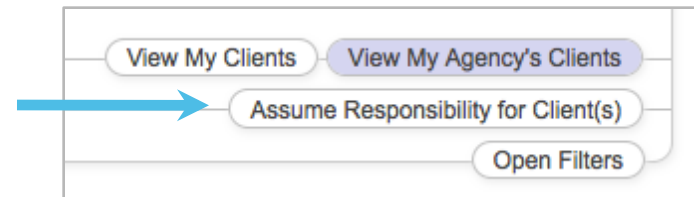
Below the filter panel, the text "Displaying 5 applicants" is visible.

Callout boxes provide instructions: "Close Filters" (top right), "Fill in desired fields and select 'Filter' to filter the list" (bottom left), and "Select 'Clear filters' to reset filters" (bottom right).



HUD Section 811 PRA

Assuming Responsibility for Clients (for case turnover)



- On the “View My Agency’s Clients” page use filters to find clients, and select “Assume Responsibility for Client(s).”
- Checkboxes will appear next to the status of each client in the list. Select your clients and choose “Assume Responsibility” just above the table.
- After you confirm this action, these clients will appear on your “My Clients” page.

Select the applicants you wish to assume responsibility over from those listed below.

[Assume Responsibility](#)

Name ▲	Date of Birth ◆	Gender ◆	Client Status ◆ ?	Case Manager ◆	User ◆
Amedeo, Patty	04/21/1993	Other	<input type="checkbox"/> North Carolina Supportive Housing Waiting: In Progress	Ima Learning	imalearning@gmail.com
Ami, Jeany	11/29/1957	Male	<input type="checkbox"/> North Carolina Supportive Housing Incomplete: Incomplete	Ima Learning	imalearning@gmail.com



HUD Section 811 PRA

Helpful Hints

- Keep client information up to date by logging in and editing their application.
- You and your client will be contacted if/when there is a housing match for your client.
- Clients may be subject to additional eligibility requirements by property providers.

Need Help? Have Feedback?

- Contact the program administrator for questions about the program and process.
- For technical support, call 1.877.496.4954.
- System feedback is welcome through the feedback link.
- Online help is available in the menu bar.

