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HUD Section 811 PRA

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Case Manager

User Guide

socialserve.com®

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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.

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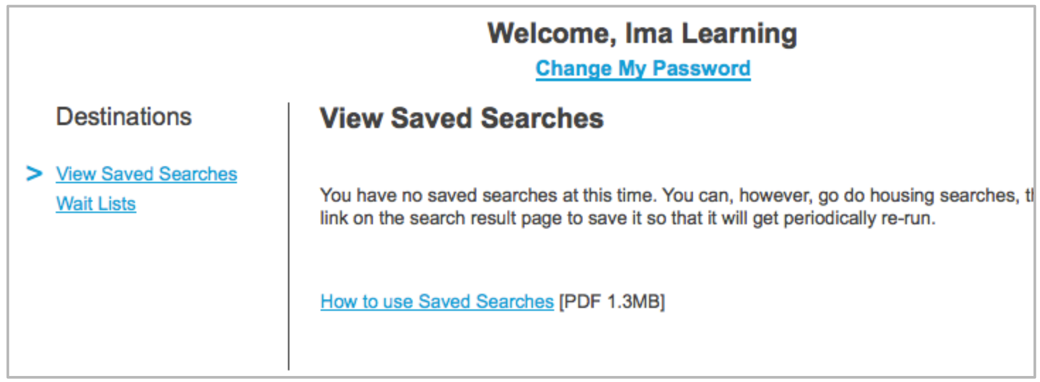
Accessing the System

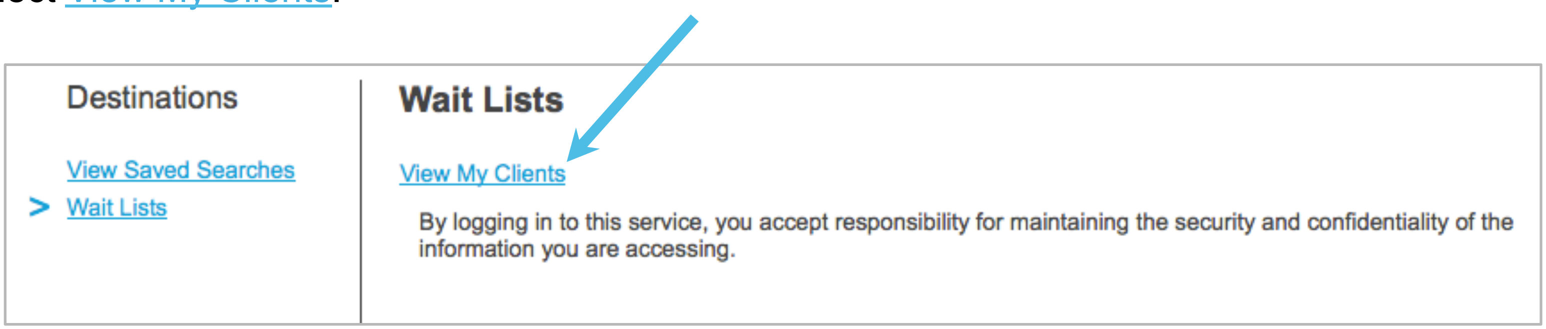
• From your personalized welcome page, you can reset your password and access your client list.



To see your clients:

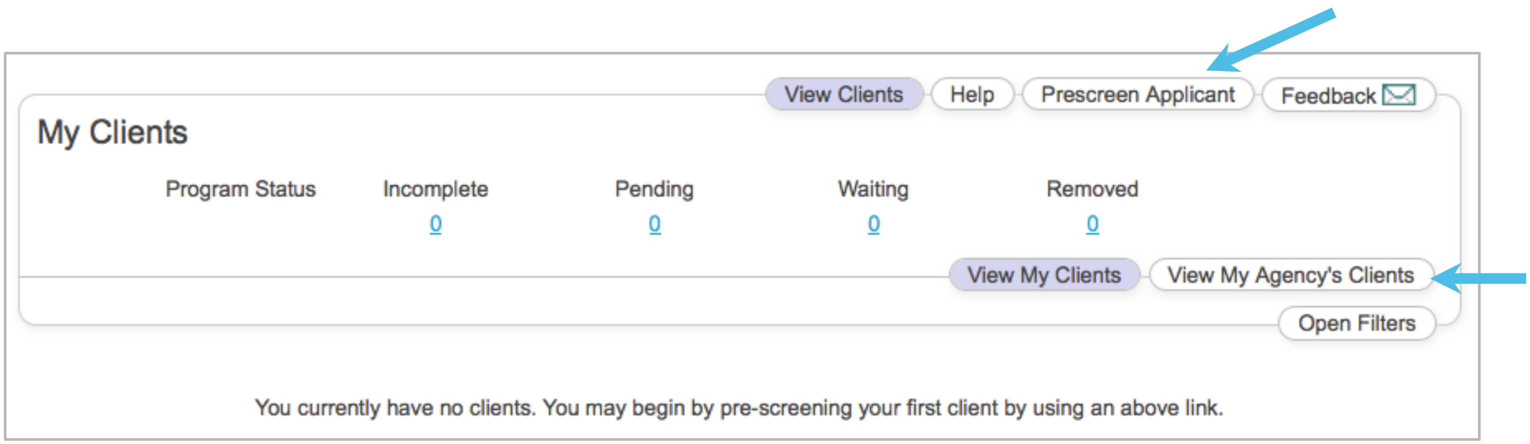
1. Under the “Destinations” heading, select Wait Lists.

2. Select View My Clients.



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.



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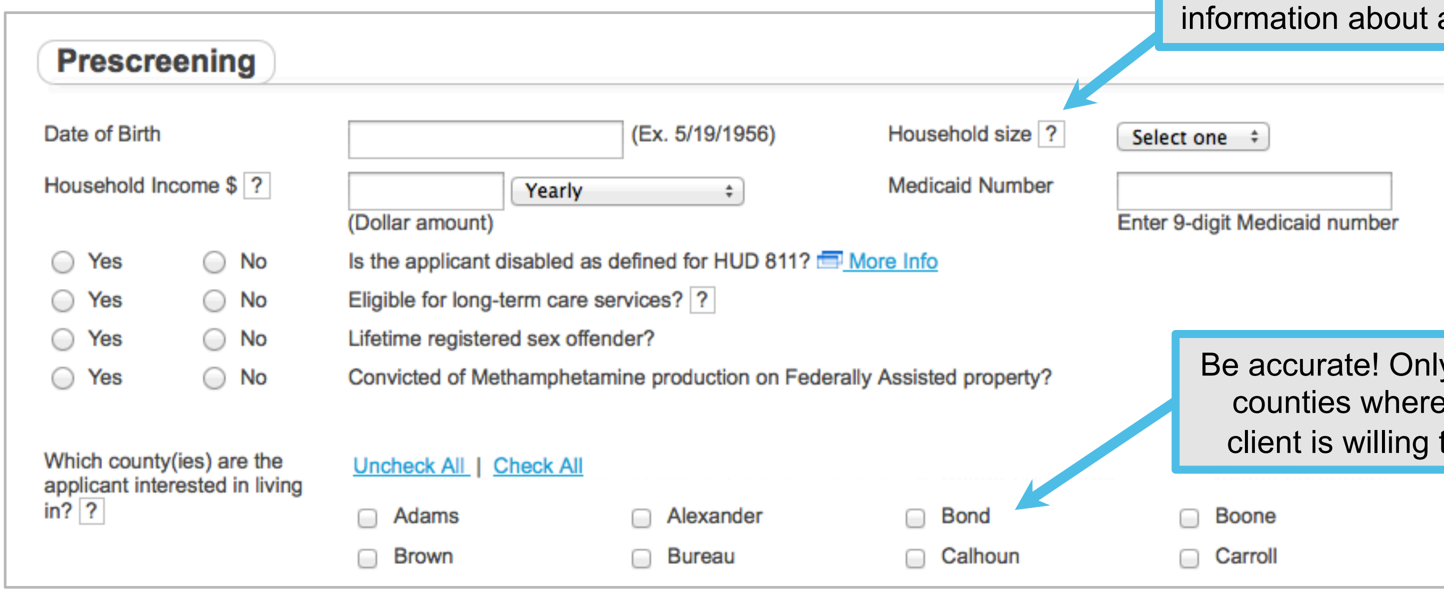
Prescreening for New Clients

- 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.

Click a ? to view more information about a field



Be accurate! Only select counties where your client is willing to live socialserve.com® housing locator service and so much **more**

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Completing an Application for New Clients

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

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

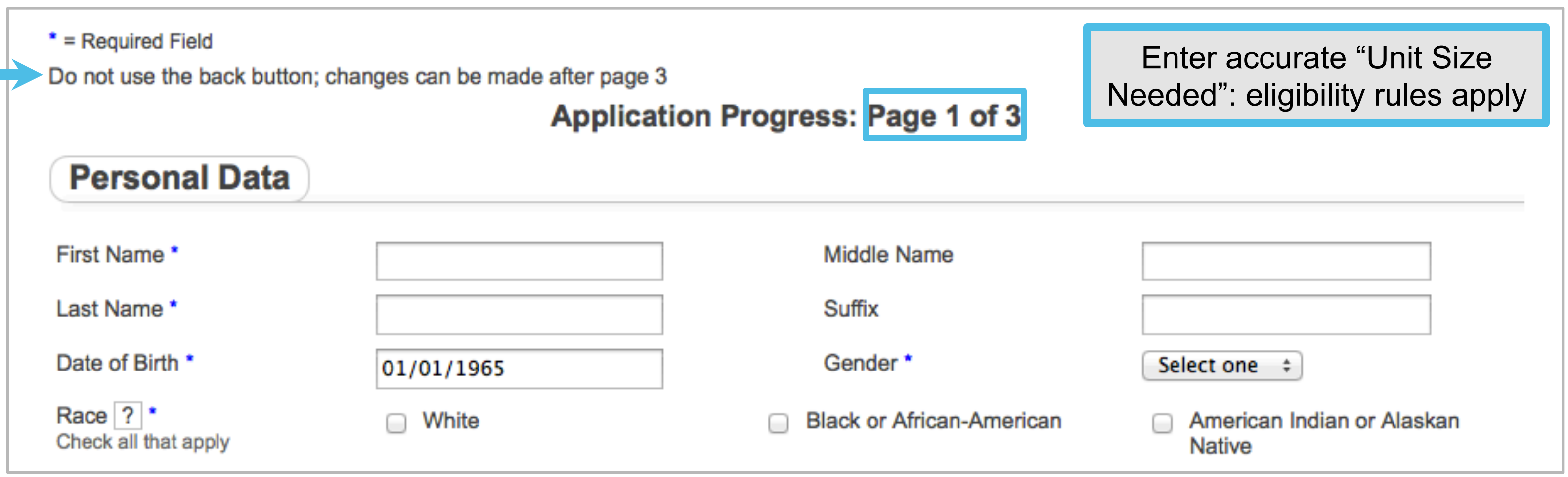
1. Select “Continue with application process.”

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.

Back button will NOT work

Enter accurate “Unit Size Needed”: eligibility rules apply



* = 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 *		Middle Name	
Last Name *		Suffix	
Date of Birth *	01/01/1965	Gender *	Select one
Race ? * Check all that apply	White	Black or African-American	American Indian or Alaskan Native

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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

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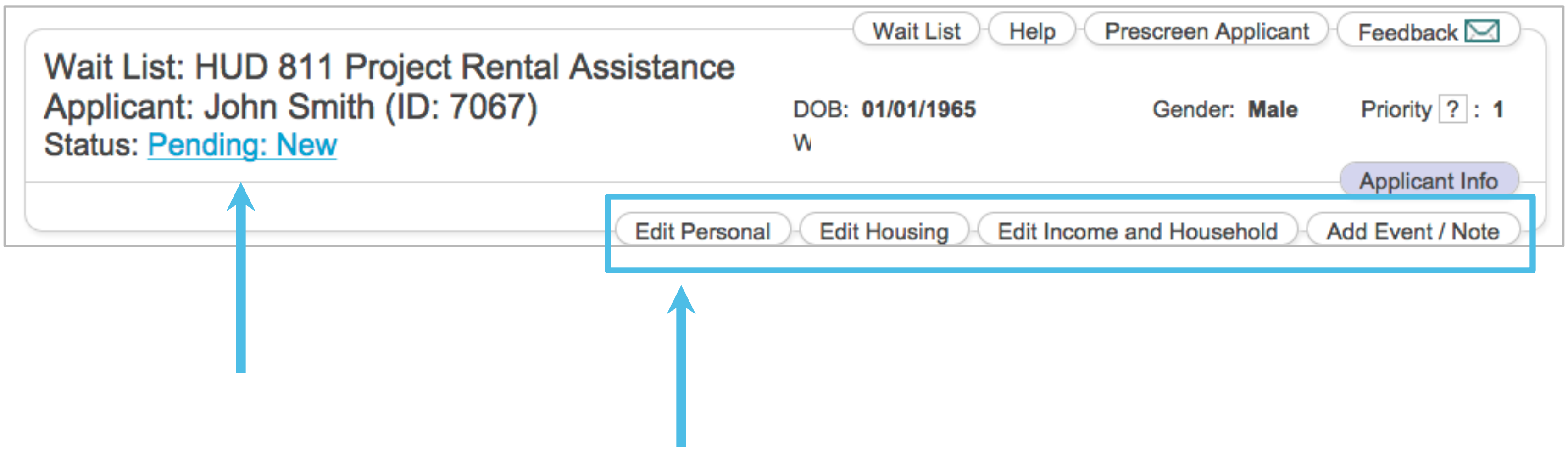
Keeping Client Information Up to Date

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



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

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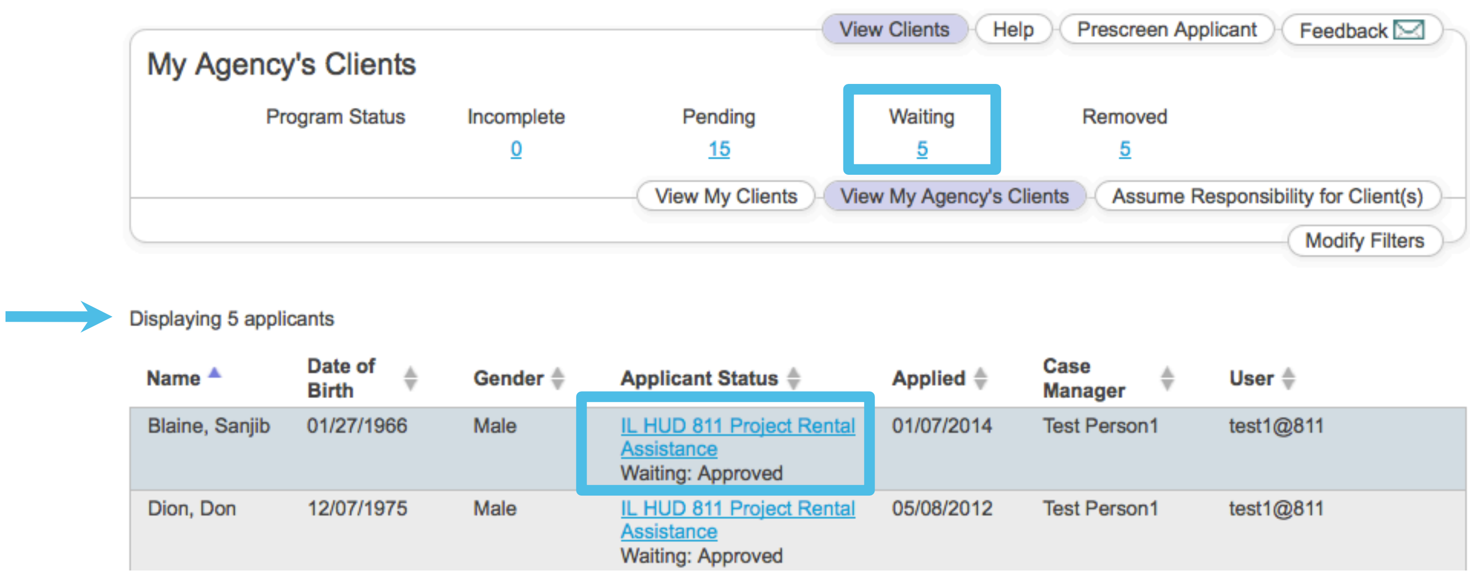
Viewing Your Clients through the Dashboard

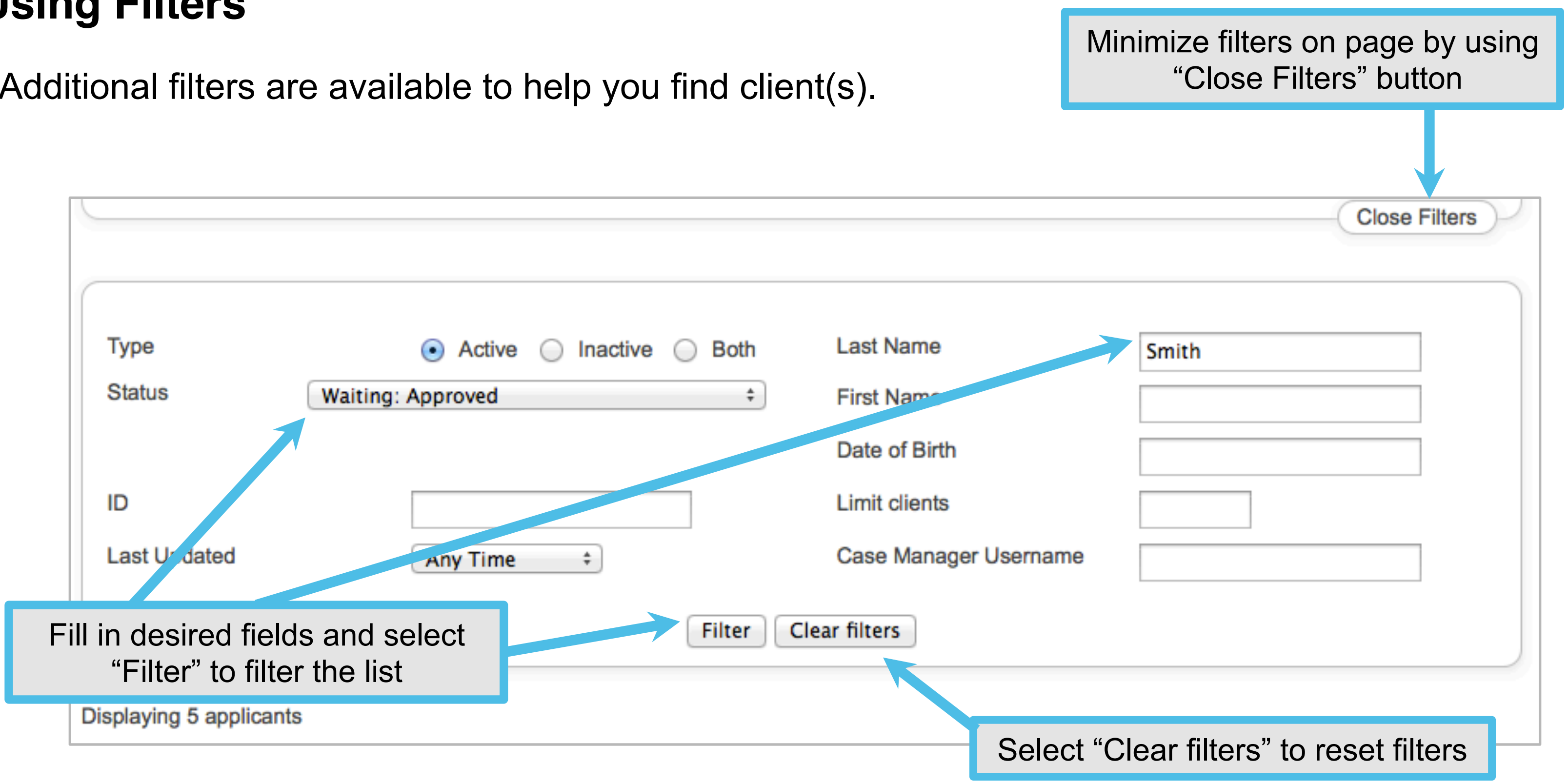
• The dashboard at the top of the "View Clients" and "View My Agency's Clients" pages gives a quick summary of the make-up of clients assigned to you or your agency.

• Select links on the dashboard to filter the list and see your clients included in the summary count.



Using Filters

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



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	North Carolina Supportive Housing Waiting: In Progress	Ima Learning	imalearning@gmail.com
Ami, Jeany	11/29/1957	Male	North Carolina Supportive Housing Incomplete: Incomplete	Ima Learning	imalearning@gmail.com

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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.