HUD Section 811 PRA

Case Manager

User Guide
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.
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.
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
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.
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
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.
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).

- Fill in desired fields and select "Filter" to filter the list.

- Select "Clear filters" to reset filters.

- Minimize filters on page by using "Close Filters" button.
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.

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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.