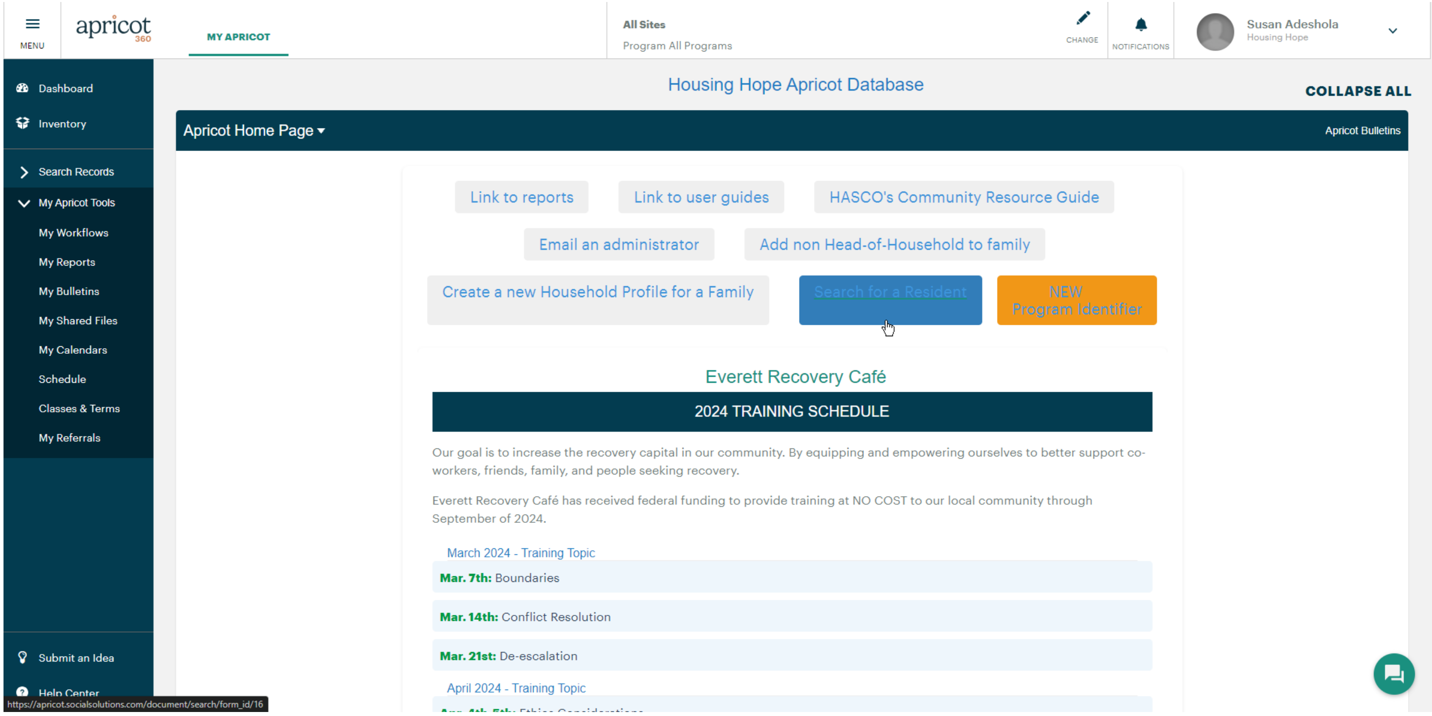
Occupancy Departure Guide

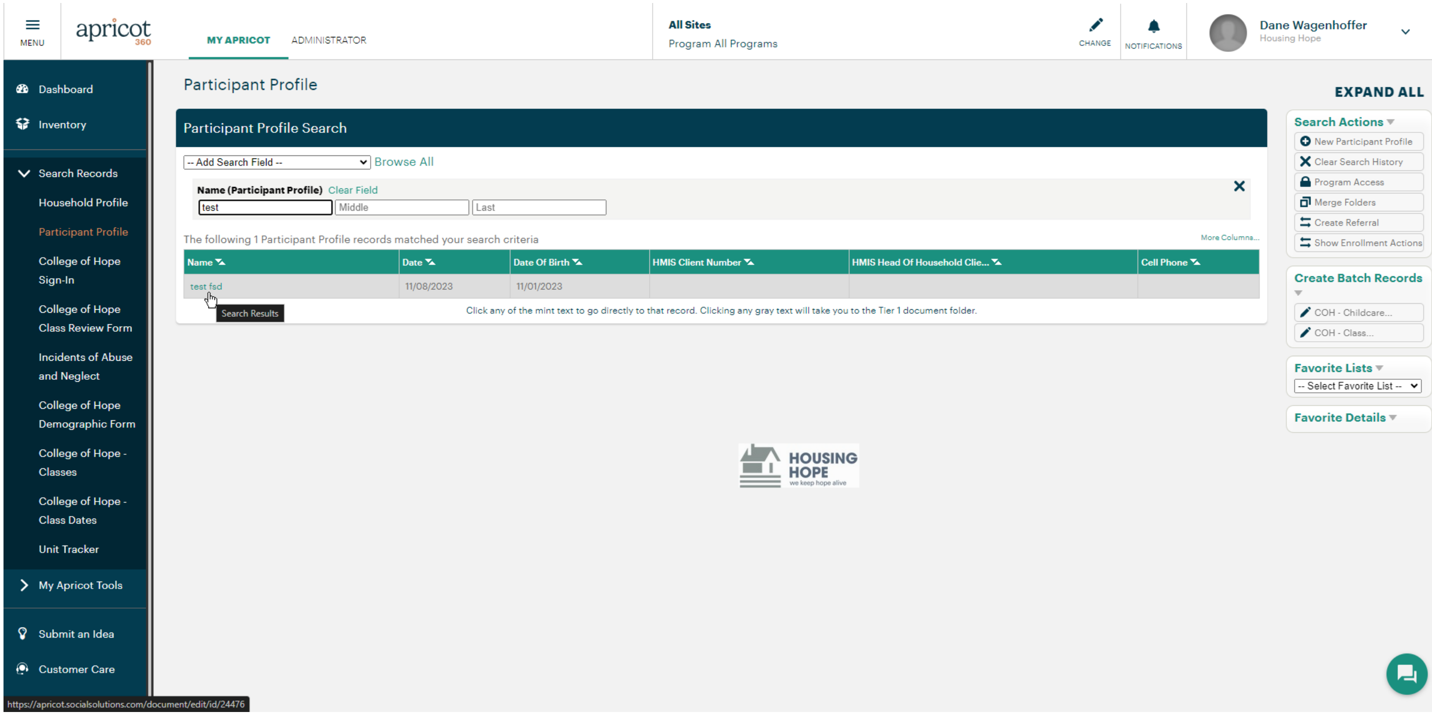
Date Updated: 06/13/2024



Step 1: Accessing the Resident Search Function

1.) Log in to the Housing Hope Apricot Database.

2.) From the home page, locate the 'Search for a Resident' button in the center-right of the screen, indicated by a blue background when hovered over. Click on this button to begin the search process.



Step 2: Searching for a Resident

1.) Enter the Resident's Information:

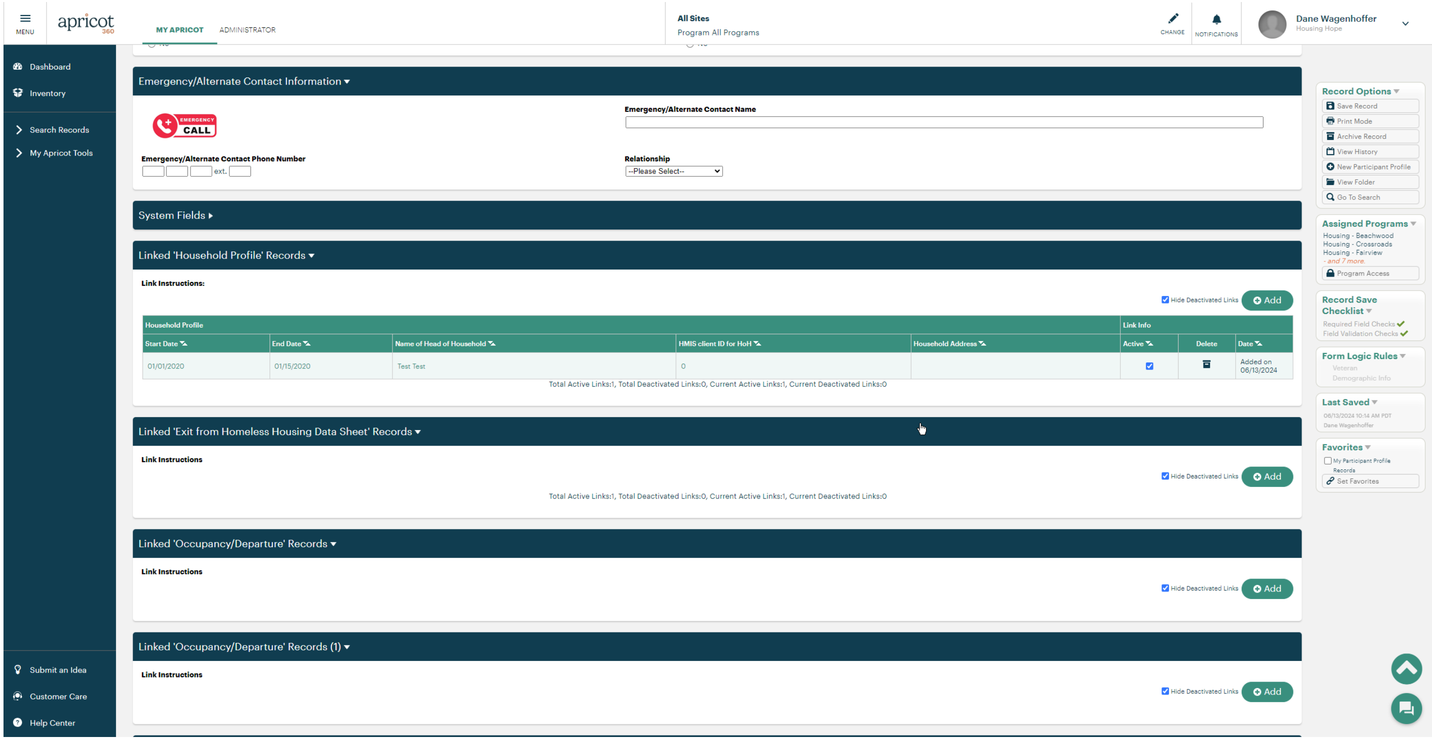
- In the 'Participant Profile Search' section, add search fields as needed.
- Enter the resident's name or other identifying information in the appropriate fields (e.g., Name, Date of Birth).

2.) View Search Results:

- Once the information is entered, a list of matching participant profile records will be displayed.
- Locate the desired resident from the list. In this example, the resident named 'test fsd' is found.

3.) Select the Resident Profile:

- Click on the resident's name in the search results to access their profile. Clicking on the mint text will direct you to the record, while clicking on the gray text will take you to the Tier 1 document folder.



Step 3: Accessing Household Profile Records

1.) Locate Emergency/Alternate Contact Information:

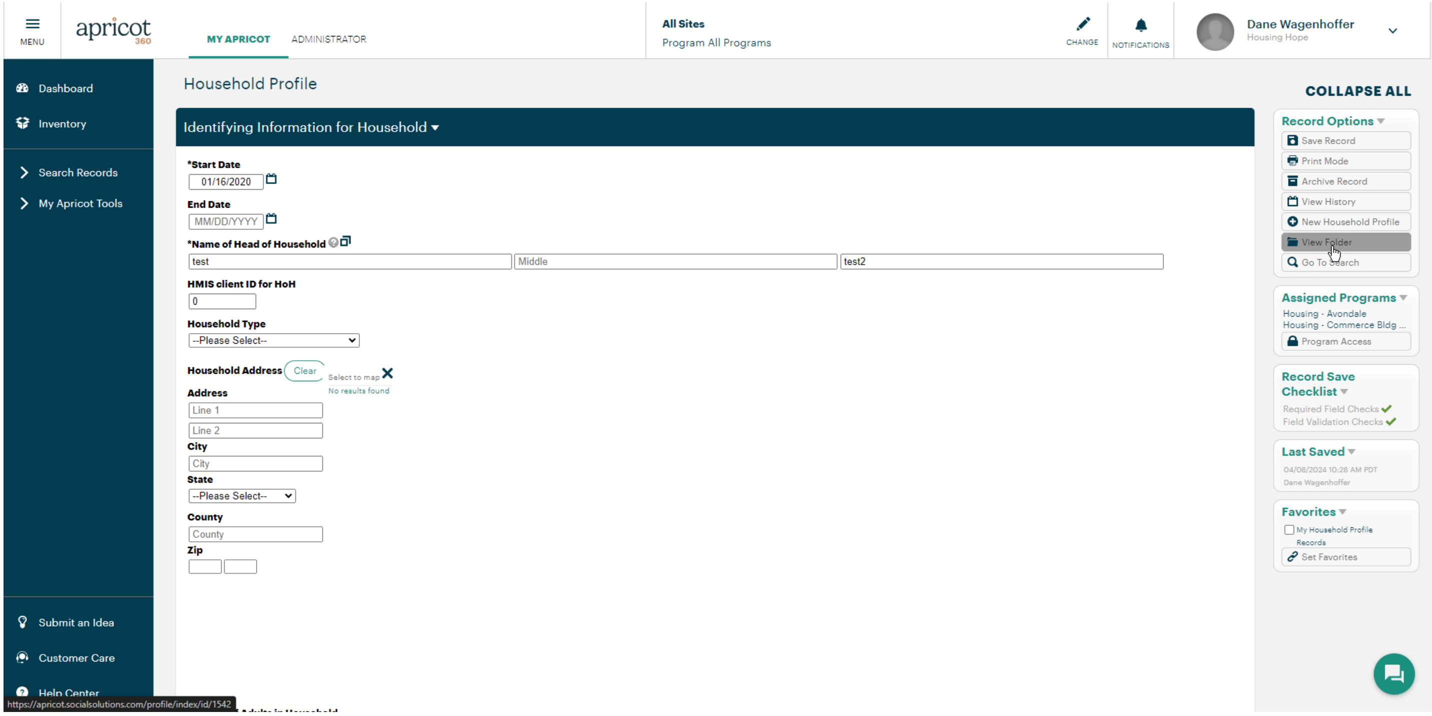
- Scroll down the resident profile page until you reach the 'Emergency/Alternate Contact Information' section. Review and update any contact details if necessary.

2.) Find Linked Household Profile Records:

- Continue scrolling to the 'Linked Household Profile Records' section. This section lists all household profiles linked to the resident.

3.) Proceed to Household Profile:

- Click on the household profile name to view more details or to update the occupancy departure information.



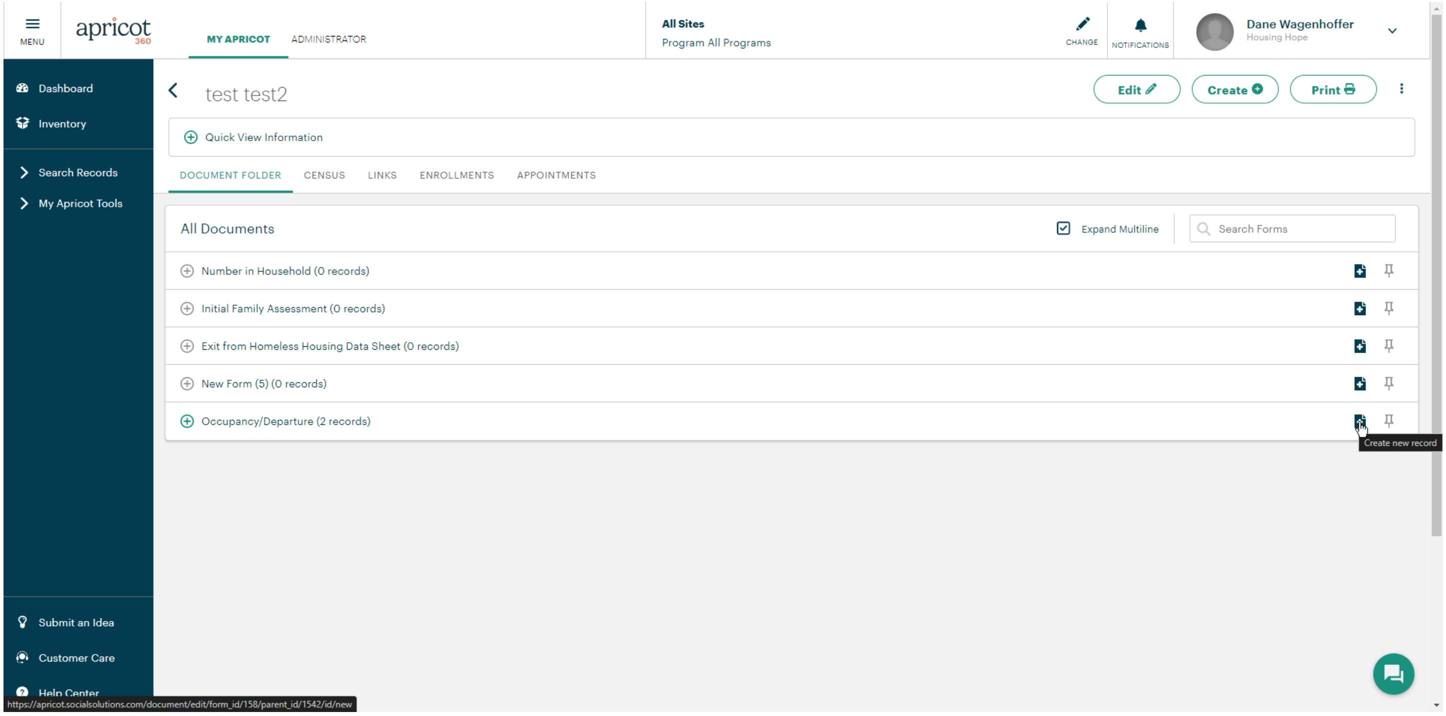
Step 4: Viewing the Household Folder

1.) Review Household Profile Details:

- After selecting the household profile, you will be taken to the 'Household Profile' page.
- Review the identifying information for the household, including the start date, name of the head of household, and household address.

2.) Access the Household Folder:

- On the right-hand side, under 'Record Options,' locate and click the 'View Folder' button. This will open the folder containing all related documents and forms for the household.



Step 5: Creating an Occupancy/Departure Record

1.) Open the Household Folder:

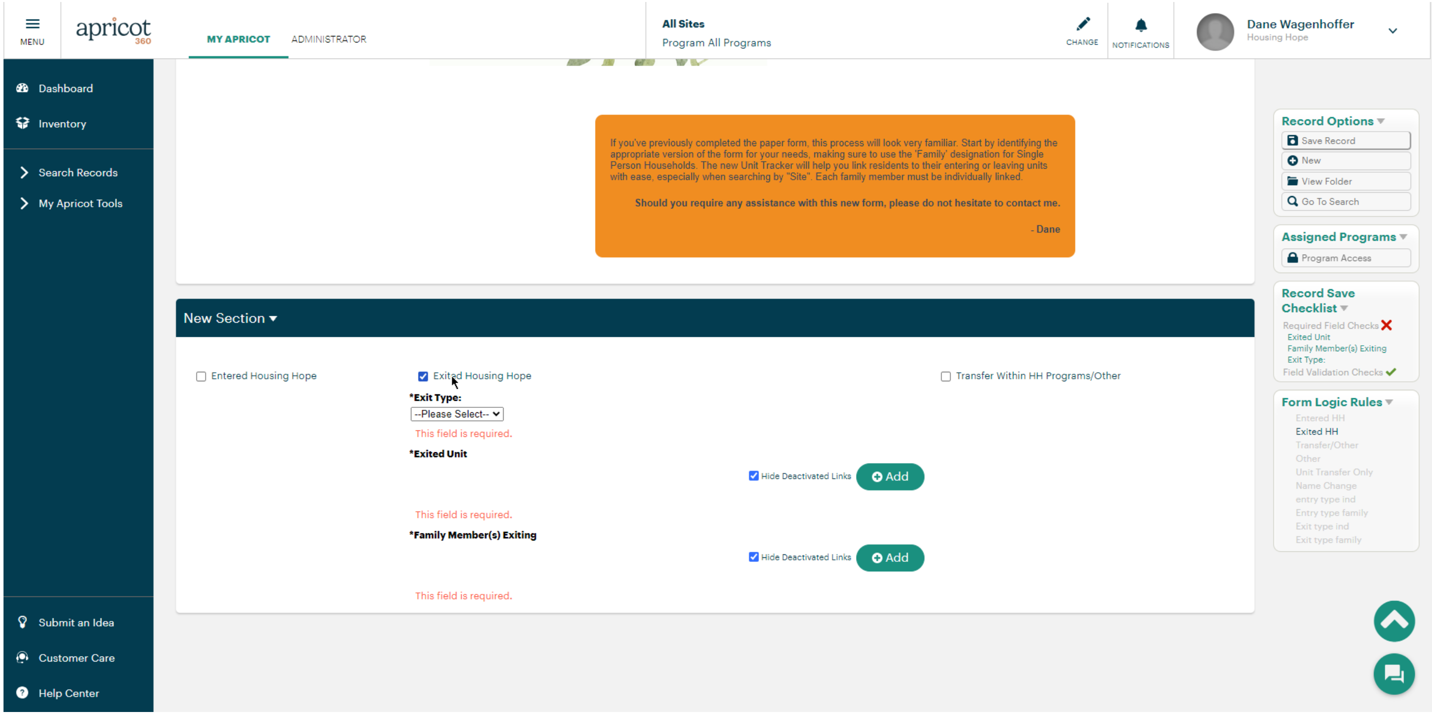
- After clicking 'View Folder' in the previous step, you will be taken to the household's document folder.

2.) Locate the Occupancy/Departure Section:

- In the document folder, find the 'Occupancy/Departure' section. This section lists all existing occupancy and departure records for the household.

3.) Create a New Record:

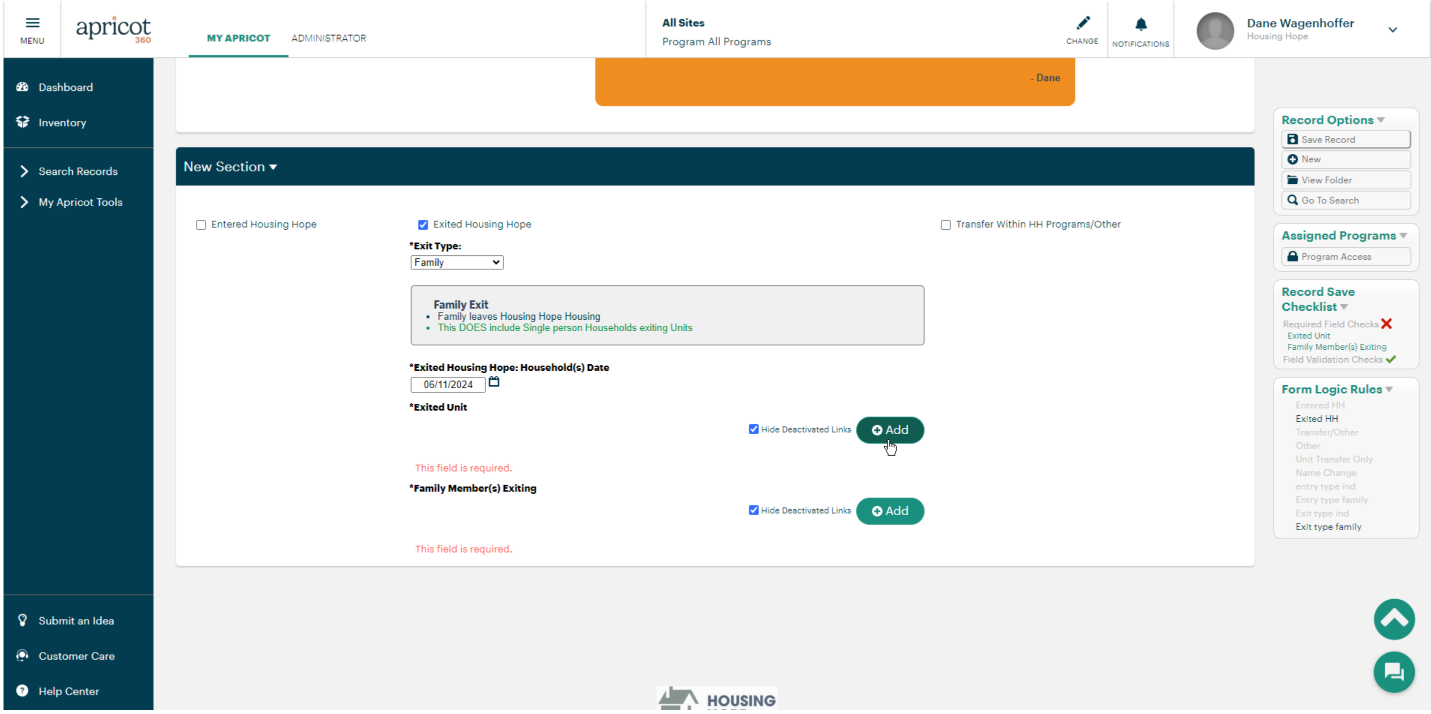
- Click the icon on the right-hand side of the 'Occupancy/Departure' section labeled 'Create new record' to initiate the process of creating a new occupancy or departure record.



Step 6: Completing the Occupancy/Departure Form

1.) Indicate Entry/Exit/Transfer Details:

- On the 'Occupancy/Departure' form, select 'Entered Housing Hope,' 'Exited Housing Hope,' or 'Transfer Within HH Programs/Other' as appropriate.
- Choose the appropriate type from the 'Type' dropdown menu (e.g., 'Exit Type' for exits).
- Enter the relevant date in the 'Date' field.



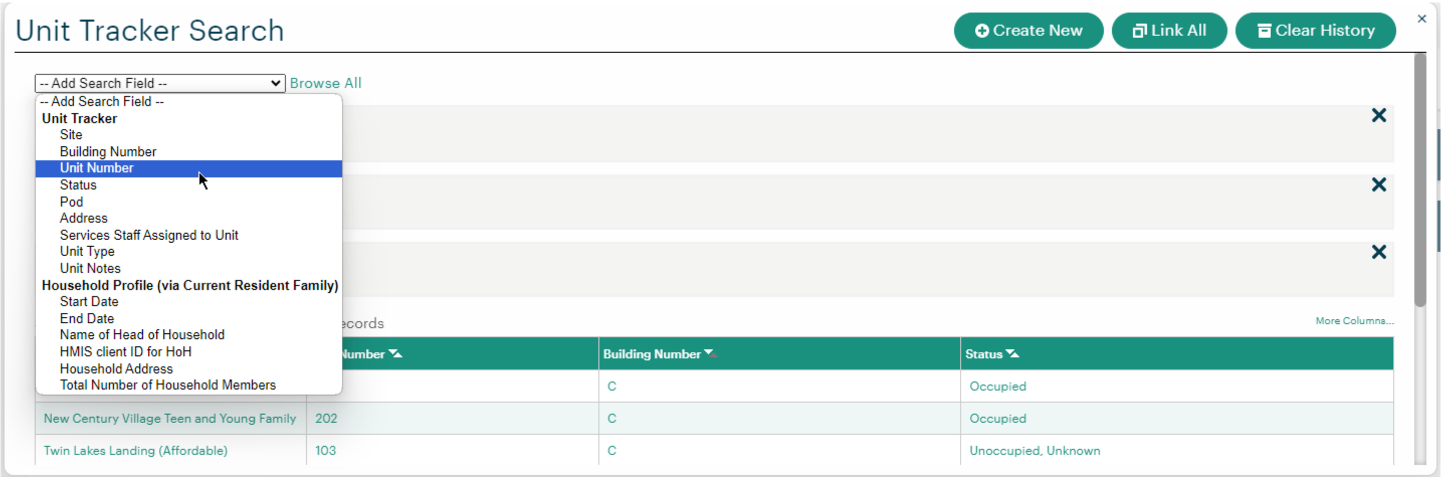
Step 7: Adding the Exited Unit

1.) Add the Unit:

- Click the 'Add' button next to 'Unit' to search for and select the unit involved in the entry, exit, or transfer.

2.) Linking Fields:

- In the next steps, we will walk through the process of linking the fields for unit and family members in detail.



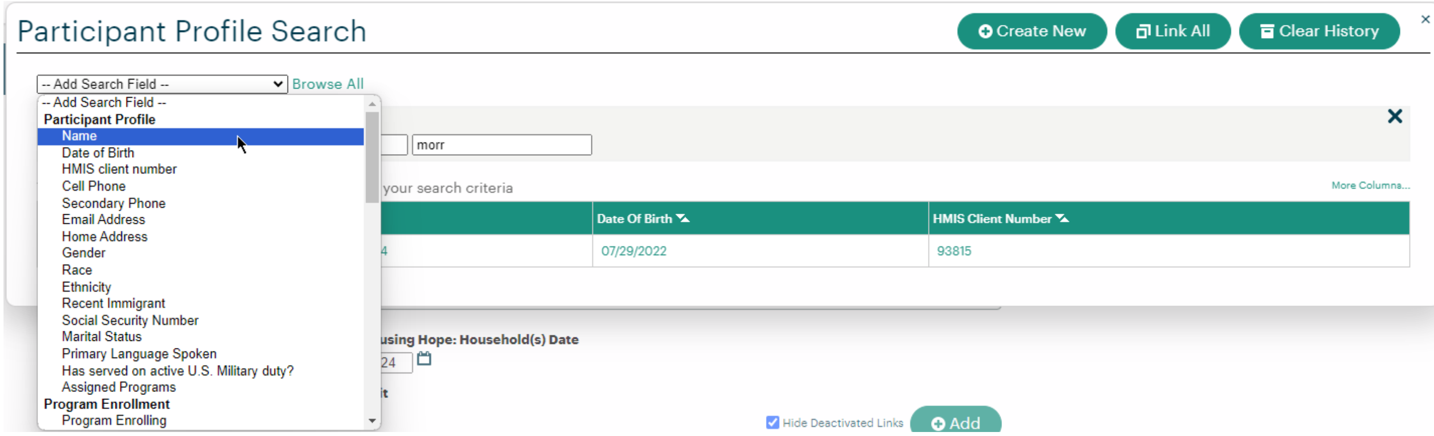
Step 8: Adding the Exited Unit

1.) Add the Unit:

- Click the 'Add' button next to 'Unit' to search for and select the unit involved in the entry, exit, or transfer.

2.) Search for the Unit: - A 'Unit Tracker Search' window will appear.

- Click the 'Add Search Field' dropdown at the top of the pop-up window.
- Use 'Site,' 'Building Number,' and 'Unit Number' to narrow down the results to your intended unit.
- Complete these fields, then select your unit from the search results.
- Click out of the box to confirm your selection.



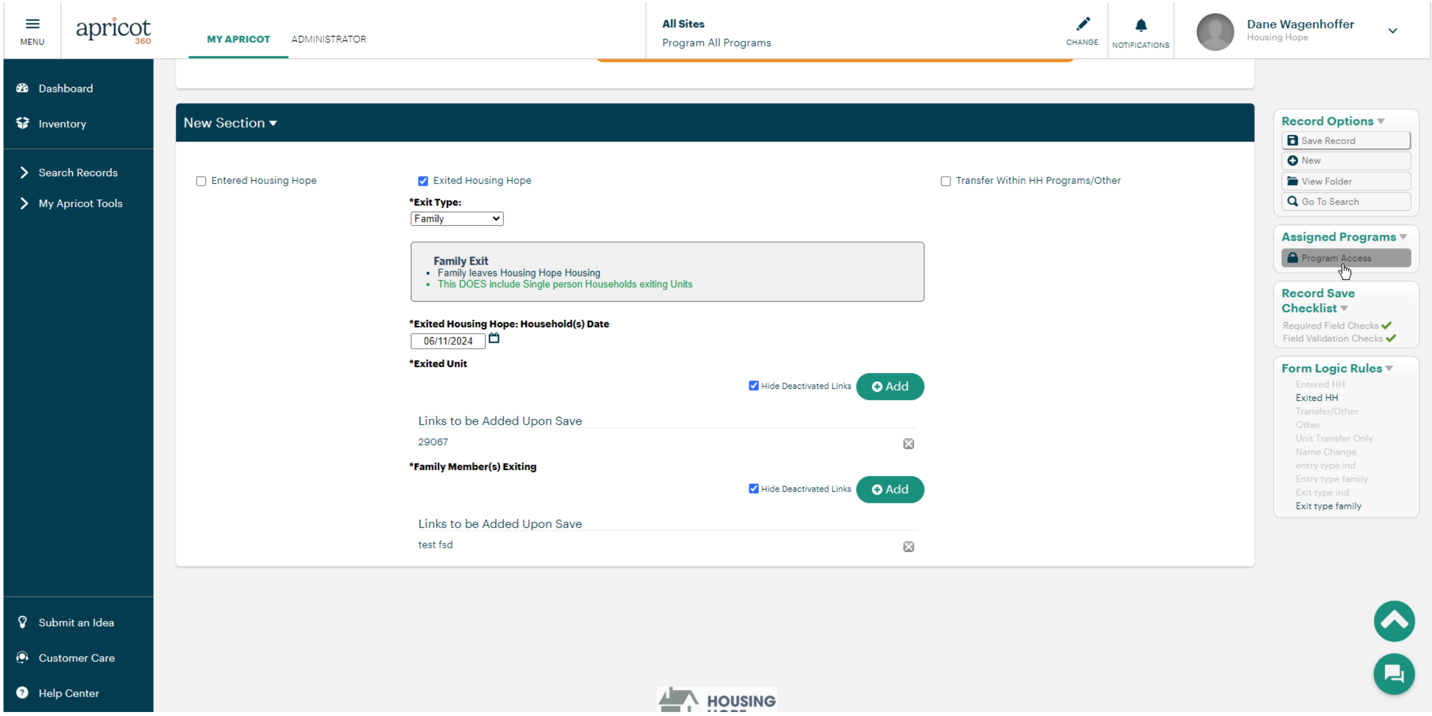
Step 9: Adding Family Members Exiting

1.) Add Family Members:

- Click the 'Add' button next to 'Family Member(s) Exiting' to add the family members participating in the exit.

2.) Search for the Family Member:

- A 'Participant Profile Search' window will appear.
- Click the 'Add Search Field' dropdown at the top of the pop-up window.
- Use 'Name'.
- Complete these fields, then select the family member from the search results.
- Click out of the box to confirm your selection.



Step 10: Reviewing Linked Fields

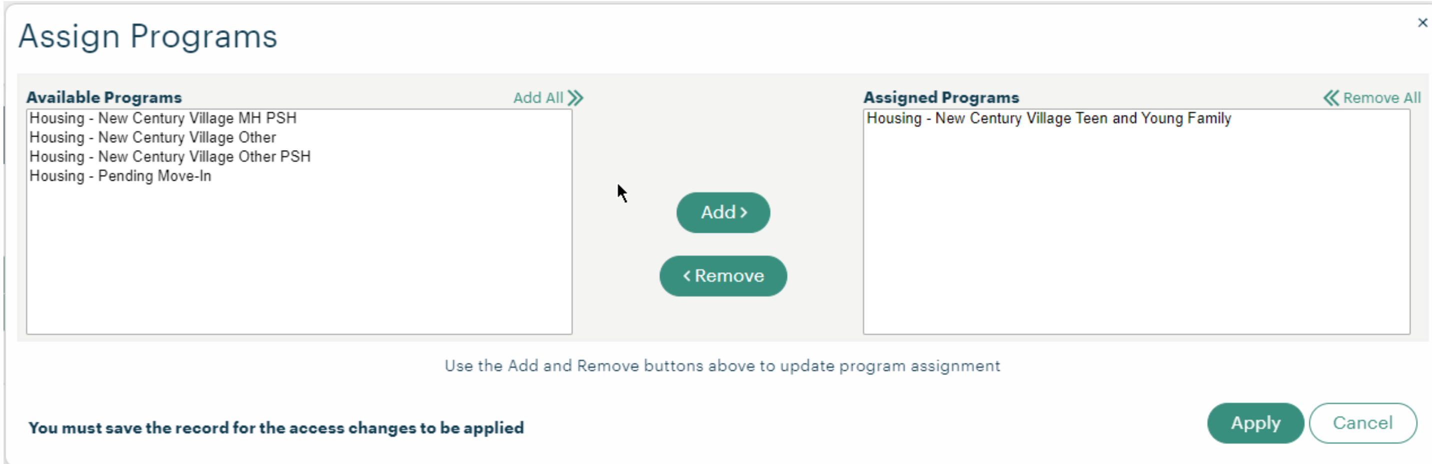
1.) Review Linked Fields:

- Ensure that the 'Exited Unit' and 'Family Member(s) Exiting' fields are filled with the correct information.

2.) Confirm Details:

- Check that the date and type fields are completed accurately.
- Verify that all linked units and family members are listed correctly.

3.) Click the Assigned Programs button on the side of your screen



Step 11: Assigning the Correct Program

1.) Navigate to Program Access:

- On the 'Occupancy/Departure' form, after adding the exited unit and family members exiting, locate the 'Program Access' button under 'Assigned Programs' on the right-hand side.

2.) Open Assign Programs Window:

- Click on the 'Program Access' button to open the 'Assign Programs' window.

3.) Select the Appropriate Program:

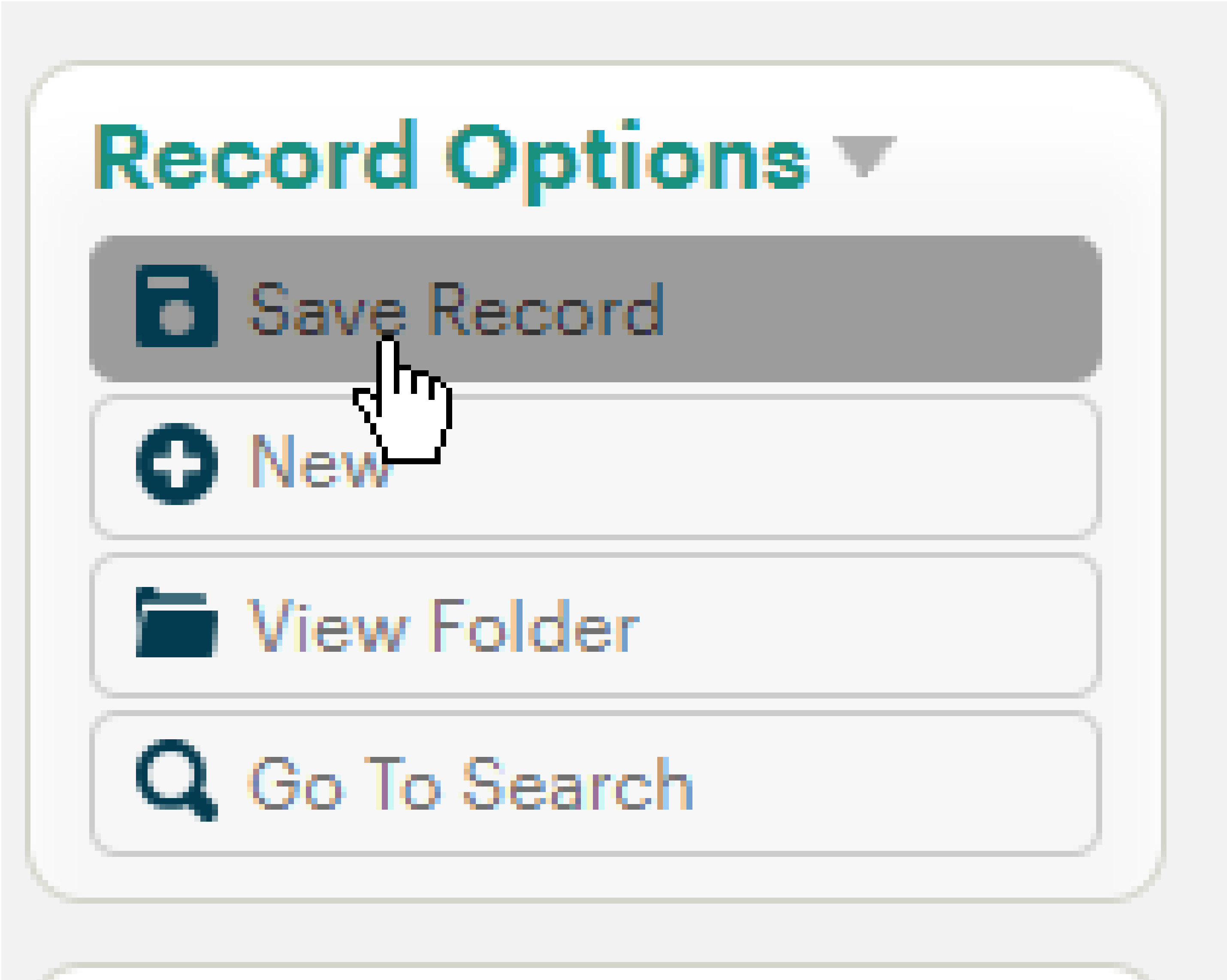
- In the 'Assign Programs' window, you will see a list of available programs on the left and assigned programs on the right.
- Find the correct program for the household by scrolling through the list of 'Available Programs' on the left.

4.) Add the Program:

- Click on the desired program to highlight it, then click the 'Add' button to move it to the 'Assigned Programs' list on the right.

5.) Apply Changes:

- Once the correct program is in the 'Assigned Programs' list, click 'Apply' to save the changes.



Step 11: Saving the Record

1.) Save the Record:

- On the right-hand side under 'Record Options,' locate the 'Save Record' button.
- Click on 'Save Record' to finalize and save all the information entered.

2.) Confirmation:

- After clicking 'Save Record,' verify that the changes have been saved correctly. You should see a confirmation message or an update indicating that the record has been saved successfully with the message "Record Saved" at the top of the screen.