**New Housing Intake Case**

Once Central intake has processed a client and determined that they need housing assistance (either RCV or H4H), the intake officer creates a housing support item and assigns it to the Housing Intake queue.

At this point the case managers of the housing team can view this queue and pick the support item. They will then update the item status to ‘In-Progress’.

**Determine Type of Housing Assistance**

Once a support item has been picked, the case manager must assess whether the client is better suited to RCV, H4H or Pre-entry. To do this:

1. go to the Assessments tab of the housing support item
2. Click ‘New Assessment’
3. Set the ‘Assessment’ field below the title, ‘Type’ dropdown, and ‘Assessment Type’ field in the ‘General’ tab all to RCV and Social Housing Assessment Form
4. Set an appointment with the client and set the ‘Date Of Appointment’ field to the correct date
5. Fill out the information in the ‘RCV Assessment Questions’ tab during your appointment with the client

Once this assessment is complete, the case manager will then create a case for either Homes for Heroes or RCV (Could potentially be automated).

**Approving Cases (Homes for Heroes only)**

First the case manager will complete a H4H Comprehensive Assessment.

At this stage, for Homes for Heroes cases the CASE MANAGER must then:

1. open the Case Approval tab
2. Set the ‘Approval From Team’ to Homes for Heroes
3. Set the ‘Send for Initial Case Approval’ to yes

The case manager then updates the support item type to either Homes for Heroes or RCV, then moves it into either the Housing Approvals queue (H4H case) or RCV and Social Housing queue (RCV)

Once a housing case has been created for approval, the housing manager will be able to view the parent support item in the Housing Approvals queue. They then have to go into the Homes for Heroes case, open the Case Approvals tab, and approve/deny the case by setting ‘Initial Case Approved’ to Yes and setting the ‘Approved By’ field to themselves.

The Housing Manager will then allocate property in the case.

At this point the Housing Manager can either assign the case to a case manager or submit the parent support item to the relevant queue (Homes for Heroes) to be picked from the queue