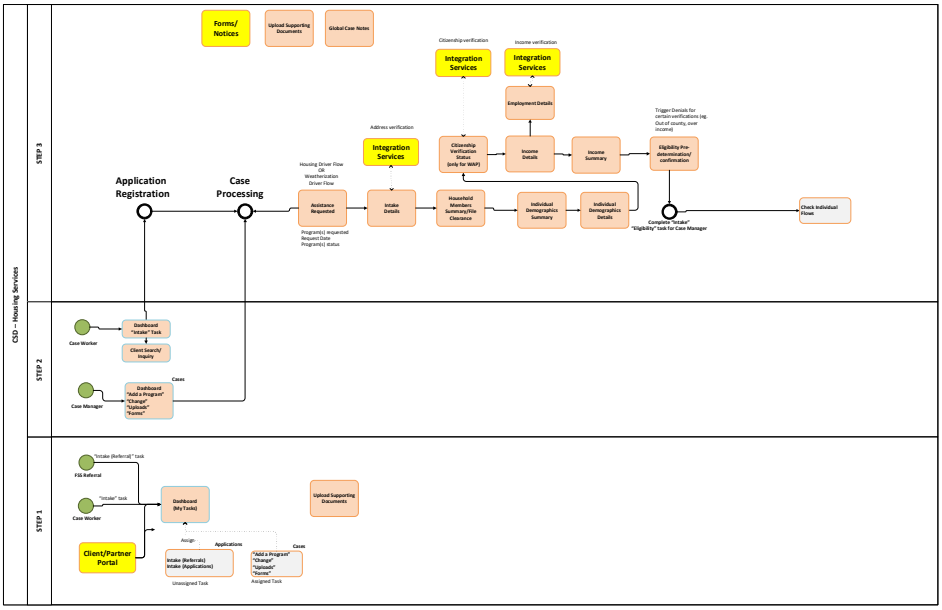
CSD – Housing Services
STEP 3
STEP 2
STEP 1
Forms/ Notices
Upload Supporting Documents
Global Case Notes
Citizenship verification
Income verification
Integration Services
Integration Services
Employment Details
Address verification
Integration Services
Citizenship Verification Status (only for WAP)
Income Details
Income Summary
Trigger Denials for certain verifications (eg. Out of county, over income)
Eligibility Pre-determination/ confirmation
Application Registration
Case Processing
Housing Driver Flow
OR
Weatherization Driver Flow
Assistance Requested
Intake Details
Household Members Summary/File Clearance
Individual Demographics Summary
Individual Demographics Details
Complete "Intake" "Eligibility" task for Case Manager
Check Individual Flows
Program(s) requested
Request Date
Program(s) status
Case Worker
Dashboard "Intake" Task
Client Search/ Inquiry
Case Manager
Dashboard "Add a Program" "Change" "Upload" "Forms"
Cases
"Intake (Referral)" task
FSS Referral
"Intake" task
Case Worker
Dashboard (My Tasks)
Upload Supporting Documents
Client/Partner Portal
Assign
Applications
Cases
Intake (Referrals) Intake (Applications)
"Add a Program" "Change" "Upload" "Forms"
Unassigned Task
Assigned Task