UTILIZING THE PROJECT BASED WAIT LIST (PBWL) INSTRUCTIONS

Enabling Multiple Wait List Entry

A DHCR password is required to enable multiple wait list entry.
First, request all users to exit SHCVS.
Next, close all open windows in SHCVS.
From the TOOLS menu, choose TABLE MAINTENANCE, WAIT LIST CONFIGURATION tab page.
Check the box labeled: "Project Based Wait List (Y/N):" located on the top right corner.
The password window will display.
Enter the DHCR password and click OK. (and the password window closes)
(returning to WAIT LIST CONFIG tab page) Press SAVE.
If 'Update was successful' displays, you are now able to insert your first PBWL.

Inserting a new PBWL:

After enabling multiple wait list entry above, the INSERT button on the toolbar will become enabled on the Wait List Configuration tab page of the Table Maintenance window. This is how a new PBWL is added to SHCVS.

A new PBWL will be associated with a specific landlord. Proceed to the LANDLORD ENTRY window and enter the new Landlord for your PBWL. This new landlord <u>MUST NOT</u> have any tenants assigned yet. Once the PBWL is entered return to the WAIT LIST CONFIGURATION tab page and the new landlord id can be selected from the landlord dropdown.

Click the INSERT button.
Enter the project name, address, phone, etc.
Choose the Landlord ID from the drop list. (The new landlord must be inserted in Landlord Entry window before it will display here.)
Enter Contact Name and Mailing address
Press Save.

Your new PBWL is ready for Wait List applicants now.

Entering an HCV Wait List applicant onto a PBWL.

- Click the WAIT LIST icon on the toolbar and the Wait List window will display.
The applicants displayed here are currently all HCV Wait List applicants.
- To place an HCV applicant on the new PBWL, locate the applicant using the "Applicant Name" selector.
- From the "Wait List" drop down, choose the PBWL that was created on the Wait List Configuration tab page above. For this example, we will name our PBWL the XYZ Project.
- Answer YES to the prompt, "This applicant is not wait listed for the XYZ Project. Add this applicant to XYZ Project?"

- Enter the 'Status' and the 'Preference' in the gray-shaded "Wait List Specific Info:" section on the window.
- Press SAVE.
- If the 'Update was successful' message displays, this applicant is now on both the HCV Wait List and the XYZ project.
- Click the Sort button on the top right of the window to display the position for this applicant.

Points to Remember:

1. The 'Project Based' / 'Wait List' dropdown will display all PBWLs for every applicant, but only those identified to the applicant are in bold-face type.

2. If the applicant was Activated from the HCV Wait List within 1 year, the applicant may be entered on a PBWL with a Deferred status. After the applicant has been activated more than one year, their status may be changed to Eligible on the PBWL.

Entering a new applicant (non-HCV) onto a PBWL:

Press Insert HOH on the toolbar.
Choose the PBWL from the selector.
Enter the HOH information
Enter the Wait List Status and Preference
Save
Enter the family member information
Save.

To Obtain a Position on a PBWL:

Press the SORT button on the Wait List Window, top right.

Entering Rejected Dates:

- The first time an applicant is rejected from a PBWL, enter the first Rejected Date.
The PBWL status will change to 'Suspended'.
- A reason may be entered in the 'Reason' column.
- Press Save.
- The status may later be changed to 'Eligible,' but the rejection date may not be removed. The next, (second) rejection date will become enabled.
- If the applicant is rejected 3 times, the status will change to 'ineligible-other reason and the 'Reason' will be set to 'Rejected 3 times'.
- If the last rejected date is more than 60 days old, it may only be changed by a System Administrator.

Notes to Remember:

1. Rejected dates only apply to PBWLs.
2. Suspended' status is not a choice for HCV Wait List applicants.

3. An applicant can have rejected dates and can have any wait list status
4. An applicant can be rejected by project based management three times.
5. You may correct an incorrect rejected date but may not remove a rejected date.

Prior Section 8 or Public Housing Assistance

- Use the vertical scrollbar above the family members section of the Wait List window to view the Prior Section 8 or Public Housing' section.
- If a family member has ever received assistance from another Section 8 or Public Housing program, enter the previous PHA, either their number (eg NY904) or their name.
- If a family member has ever been terminated from another Section 8 or Public Housing program, enter the termination information.
- If any of the Termination columns are entered, they all must be completed.

Activating from a PBWL:

- From Participant Processing, choose INSERT PART from the toolbar.
- A new 'Action Window' will display.
- Choose from New Admission, Issuance of Voucher or Portability Move In and press OK.
- The 'Select a Waitlist Member for Activation' window displays.
- Select a Wait List from the Wait List drop down.
- Select an Applicant from the selected Wait List.
- Press OK.
- Return to Participant Processing and complete all tabpages.

Notes to Remember:

1. If Activating from a PBWL, the landlord will be automatically populated, and cannot be changed.

Transferring from HCV Wait List or another PBWL:

If the applicant is eligible on a PBWL and has lived at the same location for at least one year, it is possible to transfer to another PBWL.

1. Click on the 'WL Transfer' button from the Participant Selection tab page.
2. Select the checkbox for the PBWL the family is transferring TO.
3. Press OK.
4. Return to Participant Processing. Press SAVE.

Notes to Remember:

1. Cannot transfer to another PBWL if recently activated or transferred less than one year.
2. If a transfer has been completed for an applicant in error, do not attempt to reverse the process yourself. Contact DHCR immediately for solutions.

<u>Wait List Reports:</u>

- To view a Wait List report for a specific PBWL or HCV Wait List, open Reports from the toolbar.
- Click on the Wait List tabpage.
- Choose Run Report or double-click on the requested report.
- Choose the desired Wait List or PBWL from the selector above the report.
- To view the same report for another PBWL, change the selector again.

<u>Conversion of 'Eligible' Project Based Applicants on the HCV Wait List</u>
Some LAs have entered PBWL applicants (not on the HCV program) in SHCVS and identified them to the HCV wait list as the HCV wait list was their only wait list option. These Project Based wait list applicants that are identified to the HCV wait list must be placed on the PBWL and their HCV wait list status set to ineligible other reason. This is done in the Wait List data entry window. A report is available to identify all project based wait list applicants that are eligible. Go to Reports, Wait List, Wait List Character Report. Choose the radio button for Project Based and Eligible. Refer to the Power Point Presentation WLDataEntry.

<u>Wait List Activation in Participant Processing</u>
Beginning with this version, To make a participant project based, their landlord ID can no longer simply be changed to that of a project based landlord and their project based check box checked off. The only means to identify a tenant to a project based development is to place them on the wait list for the project in the Wait List Entry window, and then select them from the project's wait list in Participant Processing.

<u>Transferring to a Project Based Wait List for On-the-Program Applicants</u>
To select an applicant that already receives HAP funding from a project based wait list, retrieve the participant in the Selection tab page and select the 'Transfer WL' button. All PBWL's on which the participant is eligible are displayed. Select the appropriate wait list. SHCVS sets the tenant's landlord ID to be the landlord identified to the PBWL in the Wait List Configuration window.

<u>New to the Program Applicant</u>
The process to select an applicant that is not receiving HAP has changed slightly. Select the <Insert> option and a window is displayed. This window lists the three actions that can be selected to insert a tenant. Since an applicant is to be selected from a wait list, select an action of either New Admission or Issuance of Voucher.

The next window has a wait list drop down that contains the available wait lists. It defaults to display the HCV Wait List. Select the wait list from which the applicant is eligible and select the applicant from the list.

The wait list information for the applicant is populated throughout Participant Processing. If the applicant was selected from a PBWL, then the landlord previously identified to the PBWL is placed on the Selection tab page as the participant's landlord. Enter the participant's information as usual and press SAVE.