



Salesforce User Guide



The Community Partnership
For the Prevention of Homelessness

FRSP Client Lease Up Process - For Providers

Provider Steps in the FRSP Client Lease Up Process

Note: Click the links below to review each step



Enter/Update Client Data on TCP Lease Up Form

Review the lease up form to ensure the submission deadline has not passed.

If it has, please reach out to your assigned lease up coordinator.

Enter the appropriate Agency/Staff information:

- Your Agency
- Your Email Address
- Your First Name
- Your Last Name

TCP Client Lease Up

Save my progress and resume later | [Resume a previously saved form](#)

If an error is noted above, you will not be able to submit this form. Please contact your assigned leasing coordinator for further assistance.

Please enter the required information below.

After Submission Deadline *

No

Agency/Staff Information

Your Agency *

Your Email *

Your First Name *

Your Last Name *

Enter/Update Client Data on TCP Lease Up Form

Some client information may be prepopulated.

Update or add information where needed:

- Client Date of Birth
- Client HMIS ID
- Client's Email Address
- Client's Phone Number
- Need for Language Line

Click Next Page

Client Information

Client's First Name *
Mary

Client's Last Name *
Smith

Client Date of Birth *
08/25/1986

Client HMIS ID *
956987

Client's Email Address (enter case manager email address, if client doesn't have an email address) *
mary.smith@gmail.com

Client's Phone Number
555-555-5555

Does the family need access to the language line during the lease up orientation? *

Yes
 No

After Submission Calculated Field (For System Use - User Cannot Edit) *

1

Next Page

Enter/Update Client Data on TCP Lease Up Form

Upload required client documents:

Birth Certificates and Social Security Cards for all family members

Photo Identification for all adults

Income documentation for the last 30 days

Click Submit

TCP Client Lease Up

Save my progress and resume later | Resume a previously saved form

Document Upload

Client Documents

All family members birth certificates and social security cards (File Size Limit: 25MB) *

[Choose File](#) No file chosen

Photo Identification for all adults (File Size Limit: 25MB) *

[Choose File](#) No file chosen

All income documentation for the last 30 days (File Size Limit: 25MB) *

[Choose File](#) No file chosen

[Previous Page](#)

[Submit](#)

[Save my progress and resume later](#) | [Resume a previously saved form](#)

Enter/Update Client Data on TCP Lease Up Form

Review and Confirm Submission

Review all data fields and document titles to ensure everything is correct.

Click Make a Correction is anything needs to be changed

Click Confirm to complete the submission

Please review your response and confirm.

You **MUST** click the **confirm** button at the bottom of this page to finalize your response. If you want to print this page for your record, you may do it now.

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If an error is noted above, you will not be able to submit this form. Please contact you assigned leasing coordinator for further assistance. Please enter the required information below.

After Submission Deadline
No

Agency/Staff Information

Your Agency
TCP

Your Email
clanders@community-partnership.org

Your First Name
Clarence

Your Last Name
Landers

Client Information

Client's First Name
Mary

Client's Last Name
Smith

Client Date of Birth
08/25/1986

Client HMIS ID
956987

Client's Email Address (enter case manager email address, if client doesn't have an email address)
mary.smith@gmail.com

Client's Phone Number
555-555-5555

Does the family need access to the language line during the lease up orientation?
- No

Document Upload (Page 2 / 2)

Client Documents

All family members birth certificates and social security cards (File Size Limit: 25MB)
(2).pdf

Photo Identification for all adults (File Size Limit: 25MB)
(5).pdf

All income documentation for the last 30 days (File Size Limit: 25MB)
(4).pdf

Attached Files:
(2).pdf (296 KB)
(5).pdf (296 KB)
(4).pdf (296 KB)

Confirm | Make a correction | Print this page

Update Client Documents

Upload updated documents, if requested

All fields are not required. Only upload the requested documents

Birth Certificates and Social Security Cards for all family members

Photo Identification for all adults

Income documentation for the last 30 days

Click Submit

TCP Client Lease Up - Document Resubmission

Please upload the updated forms using the links below. Please contact you assigned leasing coordinator for further assistance.

Client Documents

All family members birth certificates and social security cards (File Size Limit: 25MB)

[Choose File](#) No file chosen

Photo Identification for all adults (File Size Limit: 25MB)

[Choose File](#) No file chosen

All income documentation for the last 30 days (File Size Limit: 25MB)

[Choose File](#) No file chosen

[Submit](#)

Forward/Complete Documents Using E-Signature

Once ready, TCP documents will be sent to the client and provider. The documents can be signed electronically.

Click View Document to proceed with the E-Signature Process

conga SignSM

Please Sign Documents

Clarence Landers has sent Release of Information - AUTH-45270.pdf for your signature.

Please click on the button below to start the signing process.

[View Document](#)

To reassign the signer, [click here](#)

To view the audit trail, [click here](#)

Conga Sign Transaction ID: 7w5imubppo35q0z1nb9rqywf2roja3g68kpsnammqoehovgaq


Forward/Complete Documents Using E-Signature

Once ready, TCP documents will be sent to the client and provider. The documents can be signed electronically.

Click View Document to proceed with the E-Signature Process

Review the Electronic Record and Signature Disclosure and Click I Agree to proceed

Release of Information - AUTH-45270.pdf



The Community Partnership
For The Prevention
of Homelessness

RELEASE OF INFORMATION

Client's Name: Mary Smith Email Address: mary.smith@gmail.com	SSN:	Date of Birth: August 25, 1986
Address: UNASSIGNED HOUSING UNIT		Contact Number: 555-555-5555
Landlord Name:		Contact Number:

hereby authorize The Community Partnership permission to request and/or provide confidential information that is needed for the purpose of my housing and employment.

acknowledge that this release of information is valid for my tenure in the Rapid Rehousing Program.

Clients Signature *Date*

Staff Signature *Date*

By clicking "I Agree", you agree that you have reviewed the [Electronic Record and Signature Disclosure](#), and you consent to the use of electronic records and signatures in the review and execution of this document.

Forward/Complete Documents Using E-Signature

Once ready, TCP documents will be sent to the client and provider. The documents can be signed electronically.

Click View Document to proceed with the E-Signature Process

Review the Electronic Record and Signature Disclosure and Click I Agree to proceed

Click the blue Signature Block. Enter your Full Name and Initials.

Click Adopt Signature and Sign to complete the process

The screenshot shows a digital document titled "RELEASE OF INFORMATION" from "The Community Partnership For The Prevention of Homelessness". At the top, there is a logo featuring a house and a person. Below the title, there are fields for "Client's Name: Mary Smith", "SSN:", and "Date of Birth:". A white pop-up window titled "Signature Style Selection" is overlaid on the form. It has two tabs: "CHOOSE STYLE" (selected) and "DRAW". The pop-up contains the instruction "Confirm your name and choose signature style. * Are required fields." and two input fields: "* Full Name" with the text "Clarence Landers" and "* Initials" with the text "CL". Below these fields is a link "View Additional Styles". At the bottom of the pop-up is a blue button labeled "Adopt Signature and Sign" and a disclaimer: "By clicking 'Adopt Signature and Sign', I understand that I am signing this document." Below the pop-up, the document text is partially visible, including "provide confidential information that is needed for the purpose of my housing and employment." and "Clarence Landers". There is a blue "Signature" block with a red 'X' icon. Below this, there are two rows of signature and date fields. The first row is labeled "Clients Signature" and "Date" with the date "3/4/2021". The second row is labeled "Staff Signature" and "Date" with the date "3/4/2021". The staff signature is "CJ Landers".

Forward/Complete Documents Using E-Signature

Click Complete Signing to finalize and submit the signature

Once completed, you will receive a confirmation email.

Once all parties have signed the document, you will be provided with a link to download the final version.

If you are the last person in the signing process, you will be able to download the document immediately


CONGA SIGN Sign Document

Page 1 of 1

Cancel Transaction Complete Signing

English

Release of Information - AUTH-45270.pdf




The Community Partnership For The Prevention of Homelessness


RELEASE OF INFORMATION

Client's Name: Mary Smith Email Address: mary.smith@gmail.com	SSN:	Date of Birth: August 25, 1986
Address: UNASSIGNED HOUSING UNIT		Contact Number: 555-555-5555
Landlord Name:		Contact Number:

Clarence Landers
hereby authorize The Community Partnership permission to request and/or provide confidential information that is needed for the purpose of my housing and employment.

Clarence Landers
acknowledge that this release of information is valid for my tenure in the Rapid Rehousing Program.


Clarence Landers
Clients Signature


CJ Landers
Staff Signature

3/4/2021
Date

3/4/2021
Date

E-Signature Signing Order

This chart outlines the order that all parties receive documents for electronic signature.

For clients without access to email, the provider may facilitate the signing process through their email address and change the name and initials of the signing party.

Document	Release of Information	Confirmation of Assistance	Lease Up Calculations	Lease Up Packet (All Three)
First Signer	TCP Staff	TCP Staff	Provider	TCP Staff
Second Signer	Client/Provider	Client/Provider	Client/Provider	Provider
Third Signer	N/A	N/A	N/A	Client/Provider