Salesforce User Guide



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



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 pro	gress and resume later Resume a previously saved form
f an error is noted above, you will not ssigned leasing coordinator for further	be able to submit this form. Please contact you assistance.
Please enter the required information be	elow.
fter Submission Deadline *	
No 🗸	
Agency/Staff Information	
Your Agency*	
Your Email*	
Your First Name *	
Your Last Name *	

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
That yield a sign a most in
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

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

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

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.

(Page 1/2)

Landers

Client Information

Client's Phone Number 555-555-555

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

Your Agency TCP Your Email clanders@community-partnership.org Your First Name Clarence Your Last Name

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

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

Document Upload (Page 2/2)

Client Documents

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

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)



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 ESignature Process

CONGA Sign[®]

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

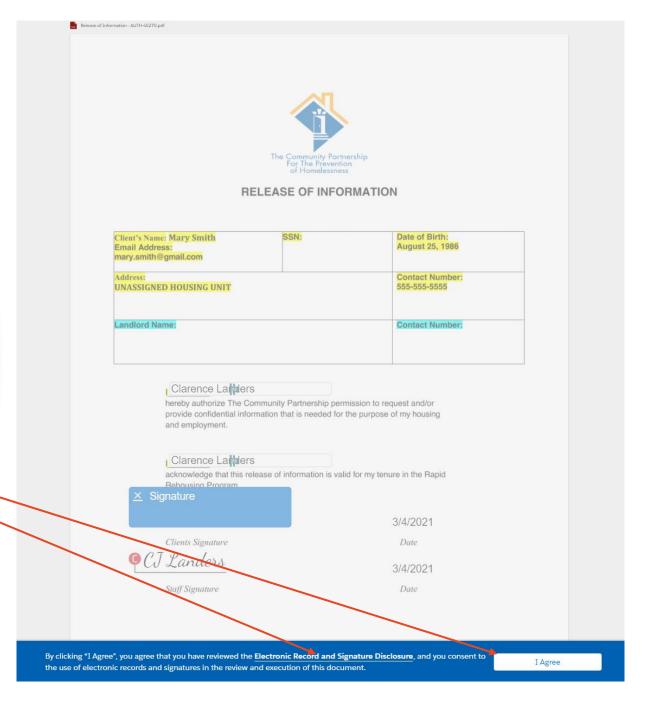
Conga Sign Transaction ID: 7w5imubpjo35q0z1nb9rqqywf2roja3g68kpsnammqoehovgaq

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



Forward/Complete Documents Using E-Signature

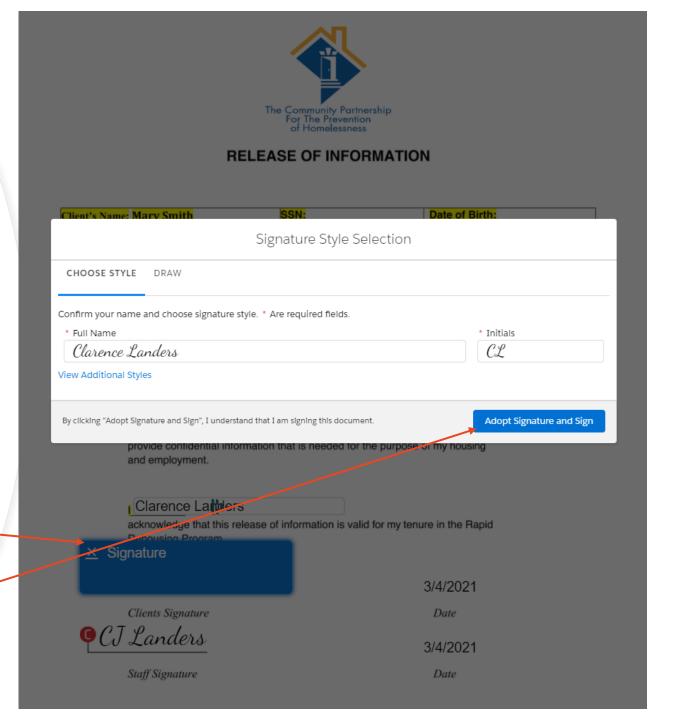
Once ready, TCP documents will be sent to the client and provider. The documents can be signed electronically.

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



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





Complete Signin









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

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



3/4/2021 Date



3/4/2021

Staff Signature

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