Housing Specialist Workflow & Referral Map

The Housing Specialist™ — Housing Made Possible

A practical map of the housing placement process and professional responsibilities.

1. Housing Placement Workflow

Stage	Main Purpose	My Role	Notes
1. Client Assessment	Understand needs and barriers		
2. Housing Plan	Set goals and next steps		
3. Document Preparation	Organize required paperwork		
4. Housing Search	Identify suitable apartments		
5. Package Submission	Submit complete application		
6. Inspections & Approvals	Track reviews and decisions		
7. Move-In & Stabilization	Support transition and stability		

2. Responsibilities and Referral Matrix

Situation	I Can Handle	Refer / Escalate To	Notes
Missing documents			
Landlord questions about program			
Client needs legal advice			
Eligibility questions			
Inspection issues			
Client in crisis			

3. Supervisor and Team Orientation

Important Contacts

Supervisor: _____ Phone: _____
Team Lead / Backup: _____ Phone: _____
Agency Contact: _____ Phone: _____

Reporting & Escalation

How I report progress: _____
When to escalate issues: _____

4. First 10 Working Days Action Plan

- ■ Complete orientation and review procedures
- ■ Observe at least one full housing assessment
- ■ Review sample housing packages
- ■ Practice documenting a case note
- ■ Identify my first learning goals

My Learning Goals for the First 10 Days

1. _____
2. _____