Waiting List Status Group Configuration

1. Terminology
   a. Groups – identify a group and assign status to this group to lay out how an applicant is to be identified as
   b. Group Detail – Identifies the Description Name and Sort order of the Group
   c. Status – Indicates the Status Description and if the status is to show them for reporting purposes as being active or inactive on the waiting list. One status will need to be indicated as the Initial Status.

2. Purpose and Effects
   a. To know where an applicant is in the application process, for example if they are actively on the waiting list, what is their current status or if they have been removed from the waiting list, a status can indicate why they were removed.

3. Requirements
   a. Who? Intake Specialists, Housing Manager
   b. What? ACOP
   c. Dependencies?
      i. Waiting Lists Status are converted from legacy system and new ones can be added at any given time

4. How To -
   a. From Home Menu, click on Waiting List Status Group Setup under Applicant List to open the configuration screen.
   b. At the top of the tab click on “+New” button to create a new Waiting List Status Group
   c. This will add a new Status Group on the right side of the screen under Groups and highlight the generic name given.
i. Type in the desired name for this status group under **Description**.

![Status Group Setup Window](image1)

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**Helpful hint:** the most commonly used should be labeled as **0** or **1**

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d. The **Sort** area can be filled in according to how commonly the Status Group is used starting at **0** and increasing.

![Status Group Setup Window](image2)

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e. Clicking on the + **Add Status** button will generate a generically named status under your waiting list.

![Status Group Setup Window](image3)

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f. Rename the status according to that waiting list. On the right are two checkboxes that are used to determine whether that status means the person is active on the waiting list and whether that status is the **one** initial status; you should check these accordingly.

![Status Group Setup Window](image4)

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System Configuration is complete: Signature: ___________________________ Date: ______________
g. Repeat until all statuses are in the system and click **Save**.

System Configuration is complete: Signature: ________________________________ Date: ________________