Santa Clara County
Hotline/Housing Problem Solving Workflow

Initial Project Enrollment

1. **DVAC Screening:** *if the client is fleeing domestic violence, ask if they are interested in speaking with the DV Hotline. If so, transfer client to DV Hotline.*
2. **Search for Client Profile** *or* **Create Client Profile** *(if necessary)*
3. **Make sure there is an active Release of Information (ROI) in the client's record***: if there is not, upload a signed PDF or de-identify the client's record*
4. **Review the client's History tab to check if they already have an active enrollment in the Community Hotline Project:** *if so, continue working within that active enrollment record*
5. **If not, enroll the client in the Community Hotline Project:**
   a. Click on the "Programs" tab
   b. Click on the down arrow to the right of the Community Hotline Project
   c. Click on "Enroll," complete the enrollment screen, and click "Save & Close"

Housing Problem Solving Assessment

Responses on the Housing Problem Solving Assessment determine whether the client may be eligible for prevention services or if they will be receiving Housing Problem Solving services or an emergency shelter referral. **After the assessment is complete, follow the instructions at the bottom of the assessment screen to determine next steps after saving the assessment.**

1. **Open the Community Hotline Project Enrollment**, and then click on the project-level "Assessments" tab
2. **Click "Start" to the right of the Housing Problem Solving Assessment**

Based on the responses in the assessment, follow the instructions to do one of the following:
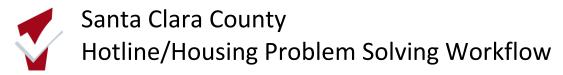
Option 1: Prevention Referral

If the client is eligible for prevention, you will see a notice that "Client is at 80% AMI or lower" for their household size, and the final question will ask which homelessness prevention services agency they'd like to be referred to. This referral isn't active in the workflow – however they will not be eligible for Housing Problem Solving so you cannot provide Housing Problem Solving.

CLIENT IS AT 80% AMI OR LOWER FOR A 1-PERSON HOUSEHOLD

Which Homelessness Prevention Services Agency Would You Like to be Referred To?   Select ⌄

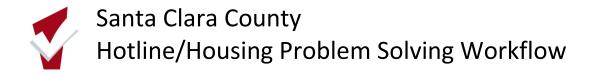1. **Save the Housing Problem Solving assessment**

2. **Discuss prevention options with manager and provide verbal referral, not recorded in HMIS**

Option 2: Client will receive Housing Problem Solving

1. **Save the Housing Problem Solving assessment.**
2. **On the next screen ("Eligibility"), toggle the "Housing Problem Solving Queue" on**
3. **Click "Refer Directly to Community Queue":** add any necessary notes, and click "Send Referral"
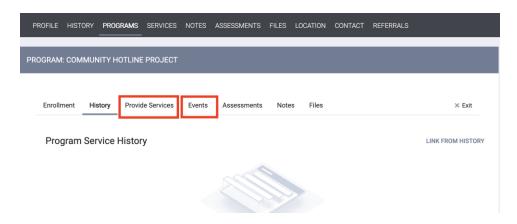
Option 3: Client does not wish to receive Housing Problem Solving and would like to directly go to the shelter queue

1. **Open the Community Hotline Project Enrollment, and then click on the project-level "Assessments" tab**
   a. Click "Start" to the right of the **Community Hotline Triage/Referral** assessment
   b. Complete the assessment, and click "Save & Close"

2. **On the Eligibility screen, toggle the appropriate "Emergency Housing Queue(s)" on**
3. **Click "Refer Directly to Community Queue":** add any necessary notes, and click "Send Referral"
4. **Provide triage services as necessary** (see table of Triage Services in appendix)

Providing Housing Problem Solving Services and Events

1. **To view a list of clients who have been assigned to you for Housing Problem Solving Services:** click "Caseload" in the top right corner, and then "Navigator"

2. **Provide services**
   a. Open active Community Hotline Project Enrollment
   b. Click on the project-level "Provide Services" or "Events" tab, depending on which item you are providing
   c. Locate the service or event to provide (based on Housing Problem Services table in appendix), click the down arrow to the right of the service, and select the appropriate service item
   d. Enter the date of the service or event, time tracking (for Housing Problem Solving Attempted and Mediation services), and any applicable service notes, then click "Submit"
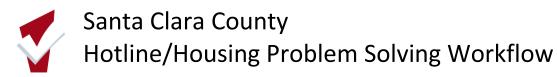

Ending Housing Problem Solving

Clients should be exited from the Community Hotline Project and removed from the Housing Problem Solving Queue when one of the following occurs:

   a. You have made 3 attempts to contact the client to discuss Housing Problem Solving options but have not spoken with them; *or*
   b. The client successfully achieves stable housing

Clients should be removed from the Housing Problem Solving Queue only and remain in the Community Hotline Project when the following occurs:

   a. No solution is identified after two attempted Housing Problem Solving conversations (i.e. client is still in need of emergency shelter triage)

1. **To exit a client from the Community Hotline Project:**
   a. Open active Community Hotline Project enrollment
   b. Click the "Exit" tab, complete the exit screen, and click "Save & Close"

2. **To remove a client from the Housing Problem Solving Queue:**
   a. Click the "Referrals" tab," then click on the "Community Queue" tab
   b. Select the "Housing Problem Solving Queue," locate the client, and click the "Edit" icon

c. In the "Remove from Queue" section, from the "Reason for Removal" picklist:

      i. Select "Whereabouts Unknown" if you have not been able to contact the client after three attempts

      ii. Select "Other" if no housing solution is identified after two attempted Housing Problem Solving conversations
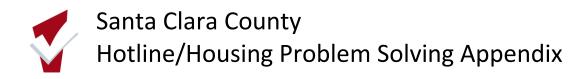
Housing Problem Solving Services and Events Table

Service	Service Item	When to Use
Housing Problem Solving Attempted	In Person	Provide the "Housing Problem Solving Attempted" service each time you have a conversation with the client exploring HPS options, whether in person or over the phone (i.e. two different conversations exploring HPS options would result in two "Housing Problem Solving Attempted" services). This service entry will also ask information on the length of time (in minutes) you spend having each conversation with the client.
	Phone Call	
EVENT: Problem Solving/Diversion/Rapid Resolution intervention or service (Previously listed at Housing Problem Solving Connection to Services)	Housing Problem Solving Connection to Services - Alcohol and/or Substance Use Services	Provide the appropriate "Housing Problem Solving Connection to Services" event each time you provide a referral to the client for any of the service categories.
	Housing Problem Solving Connection to Services - Child care services (non-financial)	
	Housing Problem Solving Connection to Services - Education Services	
	Housing Problem Solving Connection to Services - Employment Services	
	Housing Problem Solving Connection to Services - Food bank or Clothing	
	Housing Problem Solving Connection to Services - Legal Assistance	
	Housing Problem Solving Connection to Services - Mental Health/Counseling Resource	
	Housing Problem Solving Connection to Services - Other Resources (specify in notes)	
	Housing Problem Solving Connection to Services - Physical Disability Services	
Housing Problem Solving Mediation	Mediation with Employer	Provide the appropriate "Housing Problem Solving Mediation" service each time mediation takes place with any of the parties (i.e. two mediation conversations with a landlord would result in two "Mediation with Landlord" services). This service entry will also ask information on the length of time (in minutes) you spend mediating each time.
	Mediation with Family/Friends	
	Mediation with Landlord	
	Mediation with Roommate	
	Mediation with RRH/PSH Housing Program	
	Other Mediation (specify in notes)	

Housing Problem Solving Financial Assistance - **Requested** Housing Problem Solving Financial Assistance - **Requested** *(cont'd)*	Requested - Move-in costs (e.g., deposit, first month's rent, moving supplies, moving truck, storage)	Provide the appropriate "Housing Problem Solving Financial Assistance - **Requested**" service each time you are requesting any financial assistance for the client. Specify the exact expense in the notes and describe how the financial assistance will help address the client's immediate housing needs.
	Requested - Rental application fees (including payments for background and credit checks)	
	Requested - Fees for securing ID documents (such as birth certificates, social security cards)	
	Requested - Transportation (e.g., bus tickets for local transport or to relocate to verifiable, safe housing out-of-the-area, car repair for ending homelessness - such as travel from temporary/permanent housing to school/work)	
	Requested - Previous housing debt/rental arrears to facilitate an immediate housing placement	
	Requested - Utility deposits or utility arrears needed to secure housing	
	Requested - Certifications or license fees related to employment	
	Requested - Household expenses (e.g., groceries, cleaning supplies)	
	Requested - Fees for temporary childcare or other children's activities	
	Requested - Other financial assistance (specify in notes)	
These services are used by management only, and should not be entered directly by Hotline/HPS staff:		
Financial Assistance Request Status	Approved	Indicates the preliminary approval or denial of a "Housing Problem Solving Assistance –Requested" service entered by hotline/HPS staff
	Denied	
BWC Fiscal Review Decision	Approved	Indicates the final fiscal approval or denial of a "Housing Problem Solving Assistance –Requested" service after a "Financial Assistance Request Status – Approved" service has been entered by the appropriate manager
	Denied	
Housing Problem Solving Financial Assistance - **Fulfilled**	*Appropriate service item matching "Housing Problem Solving Assistance – Requested" service*	Indicates the payment of a "Housing Problem Solving Assistance – Requested" service item has been sent/paid

Santa Clara County
Hotline/Housing Problem Solving Appendix

Triage Services Table

Service	Service Item	When to Use
Contact Attempt	Attempt #1	Provide the appropriate "Contact Attempt" service each time you attempt to contact the client.
	Attempt #2	
	Attempt #3	
Transportation	Transportation Provided	Provide the appropriate "Transportation" service when a client requests transportation or transportation is provided to the client.
	Transportation Requested	
Voicemails	VM from Client Logged	Provide the appropriate "Voicemail" service each time you either receive or leave a voicemail for a client.
	VM Left for Client	