



# 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. **IMPORTANT: copy client's Unique Identifier:** *You will need to paste the client's Unique Identifier into the HPS Assessment, so it's important that you copy this from the client's profile page prior to starting the assessment*
2. **Open the Community Hotline Project Enrollment,** and then click on the project-level "Assessments" tab
3. **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**



# Santa Clara County Hotline/Housing Problem Solving Workflow

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

*If the client is literally homeless and not eligible for prevention, a notice will appear that says: "If the client is not eligible for prevention, proceed with Qualtrics." A new section of questions will appear to paste the Client's Unique Identifier, select whether the client consents to participate in the research study, and whether the client is going to receive Housing Problem Solving services (based on the Qualtrics randomization).*

IF THE CLIENT IS NOT ELIGIBLE FOR PREVENTION, PROCEED WITH QUALTRICS.

Client's Unique Identifier

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\*\*\*\*\*PROCEED WITH QUALTRICS FLIP ON ANOTHER TAB IN YOUR BROWSER.\*\*\*\*\*

Does the client consent to participate in the research study?

Select



Is the client going to receive Housing Problem Solving services?

Select





# Santa Clara County Hotline/Housing Problem Solving Workflow

## **Option 2: Selected for Housing Problem Solving**

*Housing Problem Solving assessment screen response and notice:*

Is the client going to receive Housing Problem Solving services? Yes

THE CLIENT IS GOING TO RECEIVE HOUSING PROBLEM SOLVING SERVICES. SAVE THIS SCREEN AND REFER THE CLIENT TO THE HOUSING PROBLEM SOLVING QUEUE.

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: Not Selected for Housing Problem Solving or Housing Problem Solving Unsuccessful: Community Hotline Triage/Referral Assessment**

*Housing Problem Solving assessment screen response and notice:*

Is the client going to receive Housing Problem Solving services? No

THE CLIENT IS NOT GOING TO RECEIVE HOUSING PROBLEM SOLVING SERVICES. SAVE THIS SCREEN AND COMPLETE THE COMMUNITY HOTLINE TRIAGE/REFERRAL ASSESSMENT. DO NOT REFER THE CLIENT TO THE HOUSING PROBLEM SOLVING QUEUE.

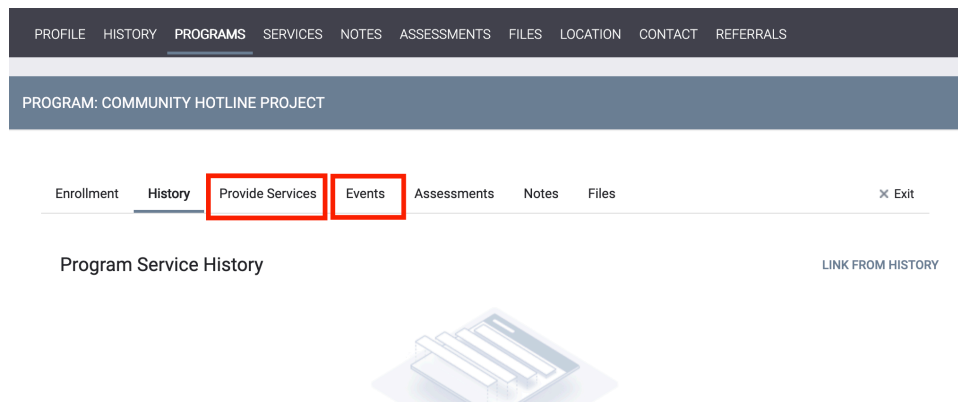
1. **Save the Housing Problem Solving assessment**
2. **If not selected for Housing Problem Solving, do *not* refer to the Housing Problem Solving Queue**
3. **Open the Community Hotline Project Enrollment, and then click on the project-level “Assessments” tab**
  - a. Click “Start” to the right of the **Community Hotline Triage/Referral** assessment
  - b. Complete the assessment, and click “Save & Close”
4. **On the Eligibility screen, toggle the appropriate “Emergency Housing Queue(s)” on**
5. **Click “Refer Directly to Community Queue”:** add any necessary notes, and click “Send Referral”
6. **Provide triage services as necessary** (see table of Triage Services in appendix)



# Santa Clara County Hotline/Housing Problem Solving Workflow

## 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:



# Santa Clara County Hotline/Housing Problem Solving Workflow

- 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



# Santa Clara County Hotline/Housing Problem Solving Appendix

## 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	
<b>EVENT: Problem Solving/Dive rsion/Rapid Resolution intervention or service</b> (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 - <b>Requested</b>	Requested - Move-in costs (e.g., deposit, first month's rent, moving supplies, moving truck, storage)	Provide the appropriate "Housing Problem Solving Financial Assistance - <b>Requested</b> " 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)	



# Santa Clara County Hotline/Housing Problem Solving Appendix

Housing Problem Solving Financial Assistance - <b>Requested</b> (cont'd)	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)	
<b>These services are used by management only, and should not be entered directly by Hotline/HPS staff:</b>		
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 - <b>Fulfilled</b>	<i>Appropriate service item matching "Housing Problem Solving Assistance – Requested" service</i>	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**

<b>Service</b>	<b>Service Item</b>	<b>When to Use</b>
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	