Case Management Workflow for Supportive Housing Programs

This is only a tool and not an in-depth review of case management activities please refer to the Case Management Workflow for further details.

CENTRAL FLORIDA COMMISSION ON HOMELESSNESS

POWERED BY HOMELESS SERVICES NETWORK

- **EDA**: Use your Funding Source EDA
- **Upon CES Assignment**
  - **Accept CES Referral in HMIS** - Only accept referral sent for "Rapid Rehousing Program"
  - **Case Manager Tab** - Assign self as case manager under your EDA from date assigned by CES
  - **Contact Participant** – Within 3 business days of assignment the Case Manager **must** contact the participant
  - **Create Case Plan Goal -** Add **ALL** notes here; this includes attempts to contact the participant
    - ***Category***: Rapid Rehousing Housing Plan → ***Type:*** RRH Case Management

- **After Initial Meeting with Participant** - *complete the following items:*
  - **Entry Assessment -** Full Entry Assessment in HMIS **after** intake has been completed in person with the participant
  - **Case Note -** Case Note to document initial meeting in the Case Plan section within 2-4 business days of contact
  - **Self-Sufficiency Matrix** - Input SSM information into HMIS (*under Measurements tab*)
  - **Housing Stability Plan** – Upload completed and signed copy into HMIS

Workflow Review: At this point, the Case Manager has completed intake. Intake means the following documents and been completed and uploaded into HMIS	
CASE MANAGEMENT FORMS ▪ Welcome Packet with Acknowledgement Form ▪ HMIS Release of Information (ROI) Form ▪ CoC Entry Assessments for Adults and Minors ▪ Housing Needs Form ▪ Self Sufficiency Matrix ▪ Housing Stability Plan	**HMIS ACTIVITIES AND UPLOADS** ▪ Upload signed acknowledgement forms into HMIS ▪ Complete ROI tab and upload form ▪ Create Program Entry using your EDA ▪ Update case notes to document intake completion ▪ Enter Self-Sufficiency Matrix ▪ Upload Housing Stability Plan into HMIS

- **Ongoing Meetings with Participants –** *complete the following items:*
  - **Case Notes -** Case Notes for all participant interactions within 2-3 business days of contact
  - **Service Transactions (ST)**- ST and case notes documenting assistance provided using flex financial funds
  - **Interim Reports -** Complete at move in to document the date a participant was housed **(*Housing Move In Date*)**
    - Document changes in household income, health insurance and other assessment fields
  - **Self-Sufficiency Matrix** – Complete in HMIS quarterly, as outlined in CM Scope of Work
  - **Housing Stability Plan** - Upload completed and signed copy into HMIS; participant given a copy
  - **Rent Calculation Forms** – Complete to determine the tenant rental contribution on a month-to-month basis

- **Participant Exit** – *complete the following items:*
  - **Assessments** - Final interim updates and self-sufficiency matrix assessments
  - **Case Note** - Final case note clearly identifying the participant exit plan for sustainability and achieved goals
  - **Housing Stability Plan** – Upload a final copy of the completed, signed plan for exit and sustainability into HMIS
  - **Case Manager Tab** - Exit self as Case Manager
  - **Exit Assessment** - Exit the participant in HMIS
    - Destination should reflect where the participant is at the time of exit. If a participant is still in their RRH unit, Destination should be "Rental by participant, no ongoing subsidy."

Workflow Review: At this point, the participant has completed services and is preparing to Exit from RRH	
CASE MANAGEMENT ACTIVITIES ▪ Final home visit to discuss next steps ▪ Exit Letter to participant ▪ Complete Termination of Rental Assistance ▪ Complete Exit List ▪ Self Sufficiency Matrix ▪ Housing Stability Plan	**HMIS ACTIVITIES AND UPLOADS** ▪ Final Case note in HMIS ▪ Upload copy of Exit Letter into HMIS ▪ Email copy of TRA to the Housing Location Team ▪ Email copy of Exit List to HLTFinance ▪ End self as Case Manager into HMIS ▪ Exit Program/Project in HMIS ▪ Final self-sufficiency matrix and interim reports ▪ Upload final Housing Stability plan into HMIS