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## (PERMANENT SUPPORTIVE HOUSING)

### **Section 1: Face Sheet & Identification Information**

- Current and completed face sheet
- Social Security Card (copy)\*
- Birth Certificate (copy)\*
- Driver's license or State Identification card (copy)\*

### **Section 2: Supportive Housing Admission Information**

- Evidence that referral was received through the Coordinated Access Network (CAN) including date of referral and name of referral source
- Letter to tenant indicating formal notice of admission and date of services start
- Documentation that tenant received a copy of the tenant guide and it was reviewed with them.

### **Section 3: Homelessness, Chronic Homelessness and Disability Verification**

- Completed documents or verification form documenting homelessness status-or chronic homeless status as applicable
- Completed documents or verification form documenting disability status

### **Section 4: Releases of Information**

- Homeless Management Information System (HMIS)
- Emergency Contact

### **Section 5: Assessment/Acuity Index**

- Initial Assessment/Acuity developed within 30 days of move in
- Assessment/Acuity indices are repeated at lease every 6 months
- Should include *at least* the two most current versions of the Assessment/Acuity with all information completed (no blanks; New/Last columns completed in Acuity portion; Active Deferred Columns completed in the Acuity portion for any scores of 1 or 0),
- Signed and dated by case manager and supervisor
- If tenant is unavailable, there is evidence that continuing attempts are made to review it with the tenant

### **Section 6: Service Plan**

- Initial Service Plan developed within 30 days of move in
- Service Plan updated/amended at least every six months
- Include *at least* the two most current versions of the service plan signed and dated by tenant, case manager and supervisor
- Goals/objectives based on the current Assessment/Acuity index and written in tenants' own words
- Service plan goals are measurable (include duration and frequency of interventions and projected completion date)

### **Section 7: Contact/Progress Notes**

- Should contain at least 12 months of notes
- Progress toward meeting service plan goals is documented at least 2 times per month
- Progress notes reflect activities taken to meet service plan goals
- Notes show contact no less than 2 times per month (including at least one face-to-face) or for tenants with less intensive needs an alternate plan of contact approved by supervisor is implemented
- Documentation showing that progress notes are entered within 1 week of services
- Progress notes include date of services, type of contact, date of note, and person entering note
- **Intake charts:** There is evidence that staff met the new tenant within 10 business days of the tenant being admitted to the program

### **Section 8: Referrals to Services outside the Agency**

- Could include behavioral health, substance use treatment, medical, employment/vocational, educational, parenting or any other service not provided by the program
- While referral information should be documented in the progress notes, and some agencies indicate referral information in service plans, it is preferred to have a separate referral form that shows date of initial referral, contact information for the individual/agency receiving the referral, any progress on the referral process, and the date the tenant engaged with the referral source

### **Section 9: Housing**

- Lease(s) copy of initial lease  
Current lease if different from initial or any lease amendments, addendums, or renewals.
- Health and Safety Evaluation. Documentation, no less than every six months, that staff have met with the tenant in their apartment to review maintenance, health, safety and quality of the unit
- There should be documentation showing deficiencies in the maintenance, health, safety and quality of the unit have been addressed
- Any information regarding legal involvement for lease violations or eviction process

### **Section 10: Collateral Information** - Bullet points below should be separate sections

- Benefit Information-*include any correspondence with outside agency*
- Employment Information
- Legal Information
- Medical Information
- Other

### **Section 11: Discharge Information (as applicable)**

- Discharge summary, signed and dated by case manager and supervisor, including identification of providers continuing services, reason for discharge, location of new residence, assessment of ongoing needs and ability to maintain housing
- Copy of discharge information given to tenant regarding discharge grievance procedure
- Tenant discharge planning occurs at least 3 months in advance of discharge date where possible

- At least three documented attempts to follow –up with discharged tenants to determine status regardless of the reason for discharge ( 1 per month for three months following discharge- if not possible, document the reason why)