

Program Guidance

Program Overview

In 2015, the State Legislature permanently reallocated a portion of Ryan White HIV/AIDS Program (RWHAP) Part B base funding from the AIDS Drug Assistance Program (ADAP) to the HIV Care Program (HCP), with the intent of increasing the number of HIV-positive people of color who are engaged and retained in HIV care and treatment.

To meet this legislative requirement and address the National HIV/AIDS Strategy goal of reducing HIV-related disparities and health inequities, the Housing Plus Project (HPP) was developed.

Four counties were funded to implement HPP during the five-year pilot phase. Using lessons learned from the pilot, the Office of AIDS (OA) has strengthened the program's focus on obtaining long-term, permanent housing. Starting October 1, 2020, Kern, San Joaquin, and Santa Clara Counties will begin implementing the program. The project will run through March 31, 2025, pending available funding.

Program Requirements

Providers will provide a variety of housing related services to Ryan White clients. Provider's participating in the HPP must:

- Maintain a minimum client caseload of 30 clients annually
- Enter all required client data in the AIDS Regional Information & Evaluation System (ARIES)
- Meet the HPP staffing requirements
- Provide the allowable HPP supportive services
- Issue timely, confidential rent payments to landlords
- Ensure that HPP services are in accordance with the service category definitions, national monitoring standards, and policy notices issued by:
 1. Health Resources and Services Administration, HIV/AIDS Branch (<http://hab.hrsa.gov/manageyourgrant/granteebasics.html>); and
 2. California Department Public Health, Office of AIDS – HCP (https://www.cdph.ca.gov/Programs/CID/DOA/Pages/OA_care_program.aspx)

Client Eligibility

Provider must ensure that clients participating in the HPP meet the following eligibility requirements:

- Have a household income <500% of the Federal Poverty Level (FPL)
- Receiving medical or non-medical case management services through RWHAP
- Has a current temporary living situation or be at risk of becoming unstably housed as defined below.

Living Situation and Stability Scale

The Living Situation and Stability Scale must be correctly determined on the Housing Assessment and in ARIES. First find the Living Situation that most closely describes the client's current housing arrangements (see first column in table below). Then determine the stability of the housing arrangement (see the remaining columns in the table below). It is important to ask clarifying questions to determine the most correct Living Situation as it correlates to the Stability Scale.

For example, Jail/Prison is always categorized as Unstable while Participant-owned housing is categorized as Stable/Permanent. Other Living Situations could fall under more than one Stability Scale. For example, a client who is couch-surfing would have "living with relatives/friends" as the Living Situation and Temporary as the Stability Scale. However, a client who has lived with her mother for the last five years might have a Stability Scale of Stable/Permanent. It is important to remember that the Living Situation and Stability Scale indicate the current point in time for the purposes of reporting on the RSR. Therefore, even if they are "Stable/Permanent", they may still qualify for HPP.

To be eligible for HPP, a client must have a Stability Scale of (a) Temporary Stability Scale or (b) Stable/Permanent but be at risk of becoming unstably housed because they cannot afford monthly rent due to unexpected circumstances (e.g. loss of job, unexpected expense such as car repair, loss of roommate, rent increase, etc.).

Living Situation	Stability Scale		
	Unstable	Temporary	Stable/Permanent
Homeless from the streets	A public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for humans, including a vehicle, an abandoned building, a bus/train/subway station/airport, or anywhere outside		
Homeless from emergency shelter	Emergency shelter		
Transitional housing		Transitional housing for homeless people	
Psychiatric facility		Temporary placement in an institution (e.g., psychiatric hospital or other psychiatric facility)	Institutional setting with greater support and continued residence expected (e.g., psychiatric hospital or other psychiatric facility)
Substance abuse treatment facility		Temporary placement in an institution (e.g., substance use disorder treatment facility or detoxification center)	
Hospital or other medical facility		Temporary placement in an institution (e.g., hospital)	
Jail/Prison	Jail, prison, or a juvenile detention facility		
Living with relatives/friends		Temporary arrangement to stay or live with family or friends	Unsubsidized permanent placement with families or other self-sufficient arrangements

Living Situation	Stability Scale		
	Unstable	Temporary	Stable/Permanent
Rental housing		Other temporary arrangement such as a RWHAP housing subsidy or Housing Opportunities for Persons with AIDS (HOPWA)-funded Short-Term Rent, Mortgage and Utility Assistance Program	<p>Renting and living in a house or apartment unsubsidized</p> <p>Subsidized house or apartment, including HOPWA-funded Tenant-Based Rental Assistance, Section 8, the HOME Investment Partnerships Program, and public housing</p> <p>Institutional setting with greater support and continued residence expected (e.g., foster care home or foster care group home)</p> <p>Permanent housing for formerly homeless persons, including Shelter Plus Care, the Supportive Housing Program, and the Moderate Rehabilitation Program for SRO Dwellings.</p>
Participant-owned housing		Other temporary arrangement such as mortgage assistance from HOPWA-funded Short-Term Rent, Mortgage, and Utility Assistance Program	Owning and living in an unsubsidized house or apartment
Board care or assisted living			Institutional setting with greater support and continued residence expected (e.g., other residence or long-term care facility)
Rented room		Other temporary arrangement such as a RWHAP housing subsidy or Housing Opportunities for Persons with AIDS (HOPWA)-funded Short-Term Rent, Mortgage and Utility Assistance Program	Renting and living in an unsubsidized room

Living Situation	Stability Scale		
	Unstable	Temporary	Stable/Permanent
Refused to answer			
Other	Hotel or motel paid for with emergency shelter voucher	Hotel or motel paid for without emergency shelter voucher	
Unknown			

Allowable Services

HPP services are designed to help clients attain stable housing. Each allowable service is described below. Clients may receive any combination of these services based on an assessment of their needs and circumstances. These services can be administered directly, subcontracted to another provider, and/or by partnering with another agency.

Personal Skill Related Services

Equipping clients with financial management and tenancy skills is an important component of HPP that can lead to successful outcomes. Providers may provide a range of client-centered services and training to assist clients with building skills to improve housing stability, including:

- 1) Client Personal Budgeting
 - All clients are required to complete a budget with the Housing Specialist to assess areas of improvement for budgeting and managing their monthly income
- 2) Tenant Communication/Skills
 - Communication skills can be provided to help clients effectively speak with landlords and other housing service providers (e.g., housing authorities, property managers, etc.)
 - Responsible tenant skills to teach clients how to be a better tenant, maintain their unit, etc.
- 3) Refer to Payee Services
 - Financial management of Social Security and other benefits offered through a third party
- 4) Refer to Other Financial Management Services
 - Organizations or any other resources that can help assist the client with financial management services

Legal Services

Legal services provide HPP clients with assistance on legal matters contributing to risk of homelessness including eviction prevention, tenant/landlord disputes, or other housing concerns resulting from HIV discrimination. Providers must either fund this service directly or collaborate with free or low-cost legal assistance for client referrals.

Employment Services

Although Ryan White funds cannot pay for employment assistance and training, providers must collaborate with organizations that provide such skills. Clients participating in HPP may seek to improve their employment opportunities and job readiness skills. Employment services may include:

- Job searches and vocational trainings
- Assessment of skill levels, aptitudes, and support service needs
- Assistance with securing course tuition and job training materials
- Access to data banks of job postings
- Assistance with completing and submitting resumes
- Development of interview skills

Housing Assistance

Rental Assistance

Rental assistance provided under HPP is intended to prevent homelessness of Ryan White clients by helping them remain in their current home while working with the Housing Specialist to achieve stable housing. Rental assistance is not automatically provided to all HPP clients. HPP rental assistance is a short-term, needs-based intervention and should not be used as an on-going subsidy. Each provider shall develop internal policy for determining any internal caps on rental assistance for their respective program and apply them consistently. Any rental assistance cannot supplant other housing Federal, State or County/City rental subsidies.

Clients receiving rental assistance must meet the following criteria:

- 1) Have legal residency in the housing unit. Eligible HPP clients must have a legal right to reside in the unit and prove responsibility for paying the rent. Satisfactory evidence of tenancy includes:
 - Lease naming the client as a leaseholder or proof of residence through a rental agreement that includes the following: date, property address, client's name, and amount of rent.
- 2) Demonstrate a need for the assistance. HPP providers should work with the client to determine and verify a client's need for rental assistance. Satisfactory evidence of need includes:
 - A record of actual monthly bills for recurring costs, and evidence of the limited nature of household income along with limited available financial resources (e.g., balance on bank account).
 - A completed Housing Assessment which includes a variety of elements such as current, previous, and future financial situation, employment and benefits status, and HIV health-related conditions.
 - Default/late payment notice that identifies the client as a named tenant under the lease.

The following are costs that are not allowable under HPP rental assistance:

- Direct payments to clients
- Mortgage payments
- Security deposits
- Rental subsidies
- Utility payments
- Dwelling repairs, modifications, and maintenance cost
- Assistance for homeless households

Housing Availability Information

The intent of this service is to assist clients with finding affordable housing and placement. Clients who would benefit from these services are those who may seek housing that fits better within their budget or will accept their Housing Choice Voucher. The Housing Specialist should work closely with the Housing Locator to coordinate housing placement for clients seeking housing. This includes:

- Creating affordable housing lists for clients
- Assisting the client with completing rental applications
- Assisting the client with completing applications for other long-term housing programs
- Finding units that will accept the client’s housing voucher

Required Staffing and Minimum Duties

The provider is required to staff Housing Specialist and Housing Locator positions. The provider may utilize current staff, hire new staff, or subcontract to fill the required positions. The Housing Specialist is a specialized position that focuses on increasing housing stability for clients receiving HPP services. The Housing Locator is a unique position that locates affordable housing units for clients, builds partnerships with landlords, and increases accessibility to other long-term, low income housing programs such as veterans housing and senior housing. Job specifications for both positions are outlined below.

<u>Position</u>	Housing Specialist (Minimum 1.0 FTE)
<u>Qualifications</u>	Experience in housing management or housing services Experience assisting clients with housing needs Experience in working with diverse populations Knowledge of housing related resources within the community Experience with providing culturally and linguistically appropriate services Bilingual in Spanish/English Preferred

<p><u>Responsibilities</u></p>	<p>Client Intake Assists and manages a minimum caseload of 30 Ryan White clients to improve client housing stability</p> <p>Completes initial comprehensive housing assessment to determine client's needs.</p> <p>Orients client to HPP, explains the housing options and program requirements</p> <p>Coordinates with RWHAP Case Manager to ensure that client's non-housing needs are met (e.g., food, medical care, medication).</p> <p>Assists clients with housing applications and related forms</p> <p>Comprehensive Housing Plan Works directly with each client to develop a comprehensive housing plan including short-term and long-term goals that moves the client towards self-sufficiency and stable housing.</p> <p>Updates housing plan as needed or at a minimum of every six-months.</p> <p>Assists clients with achieving/maintaining financial stability by assisting with budgeting education, referral for employment services/training, assisting with applications for subsidy services such as disability benefits, and providing referrals to payee services</p> <p>Case Conferencing Coordinates with the Housing Locator, RWHAP Case Managers and other entities providing client services as needed</p> <p>Documentation and Data Entry Maintains accurate case files for each client as required and updates information on a regular basis</p> <p>Completes all ARIES data entry as required including services provided, housing assistance payments, Housing Stability Status and Living Situation</p> <p>Completes all other required program evaluation data information as defined in the Data Collection Section</p>
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<u>Position</u>	Housing Locator (Minimum of 0.5 FTE)
<u>Qualifications</u>	<p>Experience in property management, housing management, and/or real estate is required</p> <p>Possess a comprehensive knowledge of local, state, and/or federal housing programs and how to access these programs</p>
<u>Responsibilities</u>	<p>Locating Housing Surveys rental market for affordable housing</p> <p>Assists in locating available, affordable, appropriate housing units</p> <p>Maintains an ongoing list/directory of affordable housing complexes and units, including Housing Choice, Veteran’s Affairs Supportive Housing (VASH), Senior Housing, Low Income Tax Credit Housing, and other affordable/low income housing providers</p> <p>Coordinates with Housing Specialist to ensure eligible clients are referred to affordable housing and assists with application process as needed</p> <p>Property Owner/Tenant Relations and Building Community Partnerships Maintains on-going relationships with landlords and other housing providers, including acting as a liaison between landlord and clients as needed</p> <p>Meets with agencies such as local shelters, housing authority, landlords, and other agencies in the county</p> <p>Attends housing-related community, coalition, and committee meetings as assigned</p>

Housing Plus Project Forms

Providers are required to utilize standardized forms for collecting client information. Providers must maintain copies of completed HPP forms for each client. Providers may keep these in a paper client chart or upload them to an electronic medical record system or ARIES. Providers should determine a single approach and maintain records consistently. Client records may be reviewed during site visits.

Providers who decide to upload documents in ARIES should refer to [The ARIES Advisor](#) (page 8) on how to use this function. Providers are also free to incorporate any additional forms required for your agency. All printable HPP forms will be accessible through www.projectaries.org.

Please note, if your organization is sharing client information with an outside agency, a “Release of Information” form must be completed by the provider and signed by the client prior to sharing client data.

Screening Tool

Prior to a client being referred to HPP services, the RWHAP Case Manager is required to complete the Screening Tool (see page 23) to determine the client’s eligibility for HPP. The intent of the Screening Tool is to ensure that only eligible clients are referred to the HPP Housing Specialist. It is the responsibility of the provider to ensure that the Screening Tool is provided to all Case Managers in their organization.

After completing the Screening Tool, if the client’s Case Manager determines that the client meets the eligibility criteria for HPP services, the Case Manager should contact the HPP Housing Specialist and provide them with the client referral, including the completed Screening Tool.

Housing Assessment

After the client is successfully referred to HPP by their RWHAP Case Manager, the Housing Specialist will follow their own internal intake procedures. Working with the client, the Housing Specialist will complete the *Housing Assessment* (see pages 24-31) to determine the client’s housing needs and eligibility for other supportive services. Questions on the form cannot be modified; however, additional questions can be added to the form to suit the needs of the agency. This form will assess the following:

- Barriers to stable housing
- Financial income and budget
- Long-term Housing Goals
- Rental Assistance Needs

The Housing Specialist will also complete a budget with the client to assist the client with their financial management needs to help them achieve and maintain stable housing. The Housing Specialist is required to meet with the client to update their monthly budget at minimum of **every six months**. Please refer to the [HUD glossary](#) for a list of housing definitions to assist with completing the Housing Assessment.

Housing Plan

After completing the Housing Assessment, the Housing Specialist must develop a Housing Plan (see page 32). The Housing Plan is created in partnership with the client to assist the client with achieving attainable housing-focused goals. The housing plan addresses barriers to obtaining and maintaining stable housing by developing goals, action steps and target completion dates. The Housing Plan should be completed and revisited:

- At the time of intake

- A minimum of every six months **or**
- When the client accomplishes a milestone on their plan

Housing Acuity Scale

The *Housing Acuity Scale* (see page 33) contains 10 questions that will help the Housing Specialist assess the client’s current housing acuity. The Housing Specialist will ask the client the questions and will tally the count of “Yes” responses. The final score will be entered into ARIES (see page 16). The overall score will be used to evaluate the client’s progress over time. The tool must be completed:

- At the time of intake
- A minimum of every six months
- At the completion of HPP services

HPP Budget Requirements

The HPP budget is part of the HCP budget. Providers are required to complete an HCP budget and obtain budget approval from OA prior to the start of the grant fiscal year. All HCP budgets must adhere to the budget requirements as outlined in the HCP budget workbook.

Providers will include HPP expenditures as part of their quarterly HCP invoices submitted to OA. As a reminder, invoices and backup documentation should not include client names or other personal identifiers.

Technical Assistance and Reporting Requirements

Ongoing technical assistance is a vital part of the new HPP. To ensure successful outcomes for the project, providers participating in HPP will work closely with the OA HPP Program Specialist by participating in monthly check-ins and collaborative quarterly meetings. These meetings will be used to provide OA updates, share best practices, provide technical assistance, and answer any questions providers may have.

In addition to meeting with the HPP Program Specialist, providers are required to meet the reporting requirements outlined below.

Technical Assistance	Frequency
Check-in Meetings	Monthly or on an as-needed basis
Collaborative HPP Calls	Quarterly
Monitoring Visits (onsite or virtually)	Annually
Reporting Requirements	
Mid-Year Progress Reports Reporting Period: April 1-September 30	Due month of November
Year-End Progress Reports Reporting Period: October 1- March 31	Due month of May
Ryan White Services Report (RSR) Reporting Period: Previous Calendar Year	Due February 19

Data Collection

Providers and their subcontractors must collect and enter data about their clients and services provided into the AIDS Regional Information and Evaluation System (ARIES). These data will be used to evaluate HPP's effectiveness and conduct compliance monitoring, as well as be included in each providers [annual Ryan White Services Report \(RSR\)](#).

This section presumes some baseline knowledge of ARIES. For a list of all required data elements, please refer to the Housing Plus Project Minimum Dataset on page 21. Additional instructions about specific data elements is provided below.

ARIES Access

If you do not have ARIES access, please complete an ARIES User Registration Form posted at www.projectaries.org/resources.

- Under Agency/Provider Name, enter the name exactly as it appears above exactly.
- Under ARIES Application, only check the ARIES Client box. Then, to the right of that box select a User Group Role from the dropdown. You will most likely check Case Manager or (if you are a manager) Agency Management.
- You and your supervisor must sign and date the form.

Follow the steps in [ARIES Policy Notice A1](#) to submit the form for approval.

Enrolling Clients in ARIES

HPP clients must be current Ryan White HIV/AIDS Program clients. As such, most clients will already have a client record in ARIES.

The Housing Specialist must enroll the client in ARIES. To avoid creating a duplicate record, use the same exact client identifiers (i.e., first and last name, middle initial, mother's maiden name [MMN], date of birth, and gender) provided on the Screening Tool. A duplicate record is created when the same client is entered differently at different agencies (e.g., John at Agency 1 and Jon at Agency 2).

Because the MMN field is not visible in ARIES, the RWHAP Case Manager will write down the last two characters of the Extended URN, which are the first and third characters of the client's MMN (in the example below, S and I) onto the Screening Tool. When enrolling the client, the Housing Specialist will enter the three characters into the MMN field (in the example below, SXI).



S X I

Last two digits from Extended URN
(HPP enter all three digits in MMN field)

For more details, refer to [Enrolling a New Client in ARIES](#).

Share Options

Clients may choose whether to share their ARIES data with other agencies where they receive services. HPP clients should be encouraged to share their data as it will assist with coordination of their services.

When you enroll a client in HPP, confirm that there is a signed and current ARIES Client Share/Non-Share Consent Form in the client’s paper or electronic file. If there is no form on file or it was signed over three years ago, the Housing Specialist must:

- Inform the client about the share options and their agency’s privacy practices (see [ARIES Policy Notice C1](#)).
- Have the client complete and sign the ARIES Client Share/Non-Share Consent Form.
- Once the completed form is obtained, the provider must then ensure that the share status to which the client has agreed is reflected appropriately. To do so, go to Demographics > Agency Specifics. Click the first Edit button. Update the Agrees to Share Data button as appropriately. Click Save.

- Then go to Eligibility > Eligibility Documents. Click the new button and select “ARIES Consent Form” under Type. Enter the date the form was signed by the client, was obtained by the Housing Specialist, and will expire. The expiration date is three years from the date which the client signs the form. Indicate in the Note field whether the client is “Share” or “Non-share.” Click Save.

Residential Address

Enter the client’s current Residential Address under Demographics > Contact Info.

Whenever the client moves, enter the Date under the Previous Address section and check the Same as Residence box. Then update the information under the Residence Address section.

Living Situation

The Housing Specialist should assess the client’s living situation (1) at enrollment, (2) every six months thereafter, and (3) when the client stops receiving HPP services. This information should be entered into ARIES.

To do so, go to Demographics > Living Situation. Click the first Edit button. Click the New button. Enter the date the Housing Assessment was completed in the As Of Date field. Select the Living Situation and the Stability Scale options that match the Housing Assessment. Click Save.

When you have an update, follow these same steps to create a new entry.

For instructions on how to determine the Living Situation and Stability Scale, consult the Living Situation section on page 3.

Client and Household Income

Whenever the client’s income is assessed or reassessed, the Housing Specialist needs to update the client’s financial information in ARIES. To do so, go to Eligibility > Financial and click the Edit button.

In the Client Income section, if the client has no income, leave the “No source of income” box checked and move to the Household Income section.

If the client has income, uncheck the “No source of income” box to unlock the data fields. Enter the monthly dollar amounts for those income sources the client reports on the Housing Assessment. ARIES will calculate the Total Client Income as you enter data.

When you reassess income, type over dollar amounts that have changed.

Financial for Andy A ADAP

CLIENT INCOME

(Amounts are monthly) **Employed** **Public Assistance**

Employment/Wages	<input type="text" value="875.00"/>	State Disability Ins/SDI	<input type="text"/>	Retirement	<input type="text"/>
Supp Security Income/SSI	<input type="text"/>	Long-term Disability/LTD	<input type="text"/>	Investment	<input type="text"/>
Soc Sec Disability Ins/SSDI	<input type="text"/>	Worker's Compensation	<input type="text"/>	Gift	<input type="text"/>
Social Security Retirement	<input type="text"/>	TANF CalWORKS	<input type="text"/>	other 1	<input type="text"/>
Gen Assist/Gen Relief GA/GR	<input type="text"/>	Veterans Benefits/VA	<input type="text" value="0.00"/>	other 2	<input type="text"/>
Unemployment/UI	<input type="text"/>	Alimony/Child Support	<input type="text" value="360.00"/>	other 3	<input type="text"/>
Total	<input type="text" value="1235.00"/>	<input type="checkbox"/> No source of income		Food Stamps	<input type="text"/>

Under the Household Income section, enter the Monthly Household Income, which may be equal to, or more than, the Total Client Income above. If the household has no income, enter 0.

Enter the Number of People in the Household, making sure to count the client as 1 person. ARIES will calculate the Federal Poverty Level.

When you reassess income, type over data fields that have changed.

HOUSEHOLD INCOME

Monthly Household Income *

People in Household * **Percent Federal Poverty Level**

Children in Household **# HIV+ People in Household**

Lastly, click the new button in the Income History section at the bottom of the screen. ARIES will copy the Monthly Client Income and the Monthly Household Income you just entered. In the blank Date field, enter the date the Housing Assessment was conducted. Click Save. Then click Save and Done.

INCOME HISTORY

Date	Monthly Client Income	Monthly Household Income	Monthly Family Income
9/1/2020	<input type="text" value="1235.00"/>	<input type="text" value="2955.00"/>	<input type="text"/>

Acuity Scale

The Housing Specialist should complete the Housing Acuity Scale and calculate a score (1) at enrollment, (2) every six months thereafter, and (3) when the client stops receiving HPP services. This information should be entered into ARIES.

To do so, go to Medical > Basic Medical and click Edit. Then scroll down to the Acuity Scale section at the bottom of the screen. Click New. Select Housing Acuity Scale under Acuity Scale, enter the total points you calculated on the tool under Acuity Score, and enter the date the scale was completed. Click Save.

When you have an update, follow these same steps to create a new entry.

Services

Most of the data entry workload will focus on services provided. Providers should enter data no later than two weeks from the date services were rendered (see [ARIES Policy Notice E1](#)).

To enter a new service, open the client’s record and go to the Services tab. Click the New button.

Date	Staff	Category	UOS	Total	Edit
9/21/2020	Karl Halfman	Ryan White HPP > Housing Assessment and Plan > Initial Housing Assessment > Initial Housing Assessment	2.00 15 Minutes @ \$0.00	\$0.00	Edit

On the Service screen, first enter the Date of Service (see [ARIES Policy Notice E3](#)). The list of contracts will change based on the date. Select the Contract Name that starts with Housing Plus.

Service

Client Name: ADAP, Andy
 Client: ADAP, Andy
 Staff: Halfman, Karl
 Date of Service: 9/21/2020
 Contract Name: Housing Plus 20/21 CA/OA
 Program: Ryan White HPP
 Primary Service: **Housing Assessment and Plan**
 Secondary Service: Initial Housing Assessment
 Agency Subservice: Initial Housing Assessment
 Units of Service: 3 @ \$ 0.00 per 15 Minutes = \$ 0.00 Total
 Client Payment: CARE/HIPP Co-Payment
 Actual Minutes Spent:
 Service Notes:
 Finalize (record will be uneditable after changes are saved)
 Save + Done Save + Another Cancel

Then select the most appropriate Primary Service (in bold below) and Secondary Service (bullets below).

Housing Assessment and Plan

- Initial Housing Assessment (Note: all clients must have this initially)
- Initial Housing Plan (Note: all clients must have this initially)
- Updated Housing Plan (Note: all clients should have this at least every six months)

Service Coordination

- Client Follow-Up (Note: use this when working with the client on the tasks in their housing plan)
- Coordinate with Case Manager (Note: use this when coordinating with the client’s Ryan White Case Manager or care team)
- Coordinate with Locator (Note: use this when coordinating with housing locator on behalf of the client)

Personal Skill Related Services

- Client Personal Budgeting
- Tenant Communication/Skills
- Refer to Payee Services
- Refer to Other Financial Management Services

Employment Services

- Refer to Employment Assistance and Training

Legal Services

- Legal Consultation Provided (Note: This service will only be activated for agencies funded to provide Legal Services)
- Refer to Legal Services

Housing Assistance

- Housing Availability Information (Note: use this when providing information on potential rental units to the client)
- Housing Application Assistance (Note: use this when working with the client to complete applications for Section 8, Veteran's Housing, or other housing programs)
- Rental Assistance (Note: Only use this when paying the landlord for the client's housing. Special additional instructions below)
- Housing Placement - Identified by Client (Note: Only use this when permanent housing has been secured by the client)
- Housing Placement - Identified by Housing Locator (Note: Only use this when permanent housing has been secured for the client by the Housing Locator)
- Housing Placement - Identified by Other Housing Program (Note: Only use this when permanent housing has been secured by another housing program)

Tracking Rental Assistance

When you provide rental assistance, it is important to track the service and costs as follows:

- Select Housing Assistance as the Primary Service.
- Select Rental Assistance as the Secondary Service.
- For Unit of Service row, enter 1 as the unit. Month will automatically populate as the measurement unit. Then enter the amount of assistance HPP is paying for in the Total field.
- Lastly, enter the total cost of the entire monthly rent in the Service Note field. Do not put any other information in this field.
- Click the Save button.

OA TRAINING
OA TRAINING
OA TRAINING
OA TRAINING
OA TRAINING

Service

Client _____ **Created Date** 9/22/2020

Staff **Site**

Date of Service * **Days to Next Service** **date**

Contract Name *

Program

Primary Service *

Secondary Service

Agency Subservice

Units of Service @ \$ per = \$ **Total**

Client Payment **CARE/HIPP Co-Payment**

Actual Minutes Spent

Service Notes

Finalize (record will be uneditable after changes are saved)

ARIES Technical Assistance

If you need technical assistance using ARIES, call 1-866-411-ARIES (2743) or e-mail aries@cdph.ca.gov. When contacting ARIES staff, do not include any confidential client information in e-mails or voice messages.

Housing Plus Project Minimum Dataset

Tab	Subtab	Data Element
Demographics	Demographic Detail > Identifiers	Last Name
Demographics	Demographic Detail > Identifiers	First Name
Demographics	Demographic Detail > Identifiers	Middle Initial
Demographics	Demographic Detail > Identifiers	Mother's Maiden Name
Demographics	Demographic Detail > Identifiers	Date of Birth
Demographics	Demographic Detail > Identifiers	Current Gender
Demographics	Agency Specifics	Agrees to Share Data
Demographics	Agency Specifics	Agency Status
Demographics	Agency Specifics	Status as of Date
Demographics	Agency Specifics	Enrollment Date
Demographics	Agency Specifics	Reason for Status Change
Demographics	Contact Info	Residence Address Since Date
Demographics	Contact Info	(Residence) Street Address
Demographics	Contact Info	(Residence) City
Demographics	Contact Info	(Residence) State
Demographics	Contact Info	(Residence) Zip Code
Demographics	Contact Info	(Residence) County
Demographics	Demographic Detail > Demographics	Sex at Birth
Demographics	Demographic Detail > Demographics	Hispanic
Demographics	Demographic Detail > Demographics	(Hispanic) National Origin/Ethnicity
Demographics	Demographic Detail > Demographics	Race (1)
Demographics	Demographic Detail > Demographics	(Race) National Origin/Ethnicity
Demographics	Demographic Detail > Demographics	Primary Language
Demographics	Demographic Detail > Demographics	Education Level
Demographics	Demographic Detail > Demographics	Veteran
Demographics	Living Situation	As Of Date
Demographics	Living Situation	Living Situation
Demographics	Living Situation	Stability Scale
Eligibility	Financial	Employed

Tab	Subtab	Data Element
Eligibility	Financial	Public Assistance
Eligibility	Financial	Employment/Wages
Eligibility	Financial	Client Income Section (enter all forms of income that apply)
Eligibility	Financial	Monthly Household Income
Eligibility	Financial	Number of People in Household
Eligibility	Financial	(Income History) Date
Eligibility	Financial	Monthly Client Income and/or Monthly Household Income
Medical	Basic Medical	Acuity Scale
Medical	Basic Medical	Acuity Score
Medical	Basic Medical	Acuity Date
Services	N/A	Contract Name
Services	N/A	Date of Service
Services	N/A	Primary Service
Services	N/A	Program
Services	N/A	Secondary Service
Services	N/A	Staff
Services	N/A	Unit of Service
Services	N/A	Cost

Training and Resources

Below is a list of relevant trainings and resources for providers participating in the HPP. As more trainings and resources become available, OA will share information on an ongoing basis.

Getting to Work: A Training Curriculum for HIV/AIDS Service Providers and Housing Providers

The Getting to Work training curriculum assists service providers in understanding HIV/AIDS in the context of employment and the different approaches to helping clients.

<https://www.hudexchange.info/trainings/dol-hud-getting-to-work-curriculum-for-hiv-aids-providers/>

The HOPWA Institute: Housing-Based Case Management and Supportive Services

This presentation covers specific topics including an exploration of the core principles of housing-based case management.

<https://www.hudexchange.info/trainings/courses/the-hopwa-institute-housing-based-case-management-supportive-services/>

HUD Housing Search Assistance Toolkit

A resource developed for case managers and housing advocates to assist clients with accessing and maintaining housing.

<https://www.hudexchange.info/resources/housingsearchtool/>

TargetHIV

Information for Ryan White HIV/AIDS Program (RWHAP) recipients to help them increase understanding and leveraging of the existing housing service system to better serve people with HIV experiencing unstable housing.

<https://targethiv.org/library/leveraging-housing-service-system-through-planning-and-coordination>

ARIES Resources

The ARIES website includes various trainings, tools and documents to help providers with navigating the ARIES system.

<https://www.projectaries.org/>

HUD Glossary

A list of HUD approved housing terms and definitions.

<https://www.hud.gov/sites/documents/43503GHSGH.PDF>

Screening Tool

Part 1: The Ryan White Case Manager must complete this form to determine if the client should be referred to the Housing Plus Project (HPP). Check all boxes that apply.

Question A: Is the client considered temporarily housed or at risk of becoming unstably housed?

Please check the housing situation that applies to the client.

- Living in transitional housing or short-term supportive housing
- Has temporary arrangement to stay or live with family or friends
- Has other temporary arrangement such as a Ryan White Program housing subsidy or HOPWA-funded short-term rent, mortgage, and utility
- Client is worried or concerned that in the next two months they may lose their stable housing

Question B: HPP provides additional supportive services outside of rental assistance. Which of the following services will the client benefit from?

- Legal Services: providing referrals to organizations that can assist clients with legal matters contributing to risk of homelessness, including eviction prevention, tenant/landlord disputes, or other housing concerns.
- Employment Assistance: connecting clients to organizations that build job reediness skills and training.
- Financial Management: monthly budgeting which may include payee and money management services to help clients better manage their finances.
- Tenant Skills: building communication skills to help clients communicate more effectively with landlords, housing authorities, property managers, etc.
- Housing Location Services: connecting clients to a specialized Housing Locator that may be able to assist with finding an affordable housing unit that meet their needs (e.g., Housing Choice Vouchers, low-income apartment rentals, VA housing, and other public housing funded units).

Part 2: If one or more boxes are checked for Question A and B, continue to complete this form. If either Question does not have any boxes checked, stop completing this form and refer the client to other services as the client does not qualify for HPP.

By signing this form, I agree that my case manager may talk to the Housing Plus Project staff about my service needs.

Client Name (print)	Signature	Date
Case Manager Name (print)	Signature	Phone Number

Part 3: The case manager must open the client’s record in ARIES. Go to Demographics > Demographics Detail. Click the Edit button next to Identifiers. Copy the client’s identifiers exactly and clearly.

Last Name	First Name	Middle Initial
__ X __		
Last two digits from Extended URN (HPP enter all three digits in MMN field)	Date of Birth	Current Gender

Part 4: The case manager must securely submit the completed form to the HPP housing specialist.

Housing Assessment

- *This form is intended to provide the Housing Specialist with baseline information that is required to be collected during the intake process for clients entering HPP. Please review and complete this form in its entirety with the client prior to the start of services.*
- *Please note, this form can be expanded to include information specific to your program. Please do not delete or remove any of the content.*
- **Indicates information that is required for ARIES data collection (see program guidance for more information on required data sets).*

*Client Name (print)

*ARIES ID

*Date of Birth

*Client's Phone Number

*Assessment Date

Part I: Client Housing Background

1. *What is the client's current living situation? Check only one box.

- Living with Relative/Friend
- Participant-owned Housing
- Rental Housing
- Rented Room
- Transitional Housing
- Other (Please describe) _____

2. *How do you characterize the client's current stability scale? (Refer to HPP Program Guidance for assistance with this question)

- Unstable
- Temporary/Subsidized
- Stable/Permanent

3. Has the client experienced any of the following barriers that prevented them from obtaining or maintaining stable housing within the last six months? (Check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Lack of rental history | <input type="checkbox"/> Housing discrimination |
| <input type="checkbox"/> Challenged credit history | <input type="checkbox"/> History of eviction(s) |
| <input type="checkbox"/> Sporadic employment | <input type="checkbox"/> Recent criminal history |
| <input type="checkbox"/> Insufficient funds/no income | <input type="checkbox"/> Recent history of substance abuse |
| <input type="checkbox"/> Large family (4+ members) | <input type="checkbox"/> Other _____ |

4. In the past year, what type of housing has the client previously lived in? Check all that apply:

- Emergency Shelter, including hotel or motel paid for with emergency shelter voucher
- Transitional housing for homeless persons
- Permanent housing for formerly homeless
- Psychiatric hospital or facility
- Staying or living in a family member’s apartment or house
- Staying or living in a friend’s room, apartment or house
- Room rented by client
- House/apartment rented by client
- Hotel/motel paid for without emergency shelter
- Other (Describe)

5. Has the client received governmental subsidized housing in the past two years?

Yes

No

Currently on waitlist

Name of housing program: _____

6. How long has it been since the client lived at a permanent address? (1+ year; not shelter or time-limited housing)

Current Residence

1 to 3 years

Less than 6 months

3 to 5 years

6 to 12 months

5+ years

7. In the past six months, has the client ever missed a rent payment or been late on rent?

Yes

No

If yes, please explain why:

8. *Please list the number of people living in the client’s household. _____

Part II: Financial Stability

9. *What is the client's highest level of education?

- 0-8 years
- Some high school
- High school graduate/GED
- Vocational/Technical school
- Some college
- College graduate
- Graduate Degree
- No answer provided

10. *Is the client currently employed?

- Full-time
- Part-time (include seasonal, temporary)
- Not employed (includes retired)
- Other (student, volunteer, disabled etc.)
- Unknown

11. If the client is currently employed, what is their occupation?

12. In the past six months, has the client ever experienced any of the following barriers to employment? Check all that apply.

- Lack of job search skills
- Lack of job readiness skills
- Limited employment history
- Childcare challenges
- Transportation challenges
- Unable to pass background check
- Not applicable
- Other -please explain any additional barriers not listed:

13. *Is the client a veteran? Yes No**14. Does client qualify for VA benefits:** Yes No

15. *Has the client received income from the following sources within the past month? (Check all that apply)

Client Income	Amount
<input type="checkbox"/> Employment/Wages	\$
<input type="checkbox"/> Supp Security Income/SSI	\$
<input type="checkbox"/> Social Security Disability Insurance/SSDI	\$
<input type="checkbox"/> Social Security Retirement	\$
<input type="checkbox"/> General Assistance/General Relief GA/GR	\$
<input type="checkbox"/> Unemployment/UI	\$
<input type="checkbox"/> State Disability Insurance/SDI	\$
<input type="checkbox"/> Long-Term Disability/LTD	\$
<input type="checkbox"/> Worker’s Compensation	\$
<input type="checkbox"/> TANF CalWORKS	\$
<input type="checkbox"/> Veteran’s Benefits/VA	\$
<input type="checkbox"/> Alimony/Child Support	\$
<input type="checkbox"/> Retirement	\$
<input type="checkbox"/> Investment	\$
<input type="checkbox"/> Gift	\$
<input type="checkbox"/> CalFresh (Supplemental Nutrition Assistance Program or food stamps)	\$
<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants and Children (WIC)	\$
<input type="checkbox"/> Other source- please explain:	\$
Monthly Total	\$

16. *Does the client receive any of the following government benefits? (Check all that apply)

- Medi-Cal health insurance
- Medicare health insurance
- Veterans’ Administration (VA) Medical Services
- Other _____

17. What best describes the client’s current credit status?

- Good Fair Challenged No credit history Unsure

18. Does the client have a bank account? Yes No

- Checking Saving Other _____

Client Monthly Budget

Housing	Amount	Entertainment	Amount
Rent	\$	Cable/TV	\$
Electricity	\$	Subscription Services	\$
Gas	\$	Alcohol/Tobacco	\$
Water, Garbage, Sewer	\$	Sports	\$
Maintenance or Repairs	\$	Movies/Concerts	\$
Other:	\$	Other:	\$
Transportation		Credit and Loans	
Vehicle Payment	\$	Credit Cards	\$
Bus Pass	\$	Payday Loans	\$
Fuel	\$	Student Loans	\$
Maintenance/Repairs	\$	Other:	\$
Other:	\$		\$
Insurance		Legal Services	
Life Insurance	\$	Child Support	\$
Vehicle Insurance	\$	Alimony	\$
Health Insurance	\$	Liens and Judgments	\$
Other:	\$	Other:	\$
Food		Back Taxes	
Groceries	\$	Federal	\$
Dining Out	\$	State	\$
Other:	\$	Local	\$
Communications		Personal Care	
Cell Phone	\$	Hair/Nails	\$
Internet	\$	Clothing	\$
Home Phone	\$	Child Care	\$
Other:	\$	Other:	\$

*Combined Monthly Household Income (includes government benefits)	\$
Combined Monthly Expenses	\$
Balance (Monthly Income-Monthly Expenses)	\$

Part IV: Housing Needs

Please only complete this section for clients who are seeking housing placement. Once this form is completed, please provide this information to the housing Locator.

19. Based on the completed assessment, the client could use assistance with:

- Applying for long-term housing (rental property)
- Applying for subsidized housing such as Section 8, Veterans Housing, Senior Living, etc.
- Finding a rental space that will accept their housing voucher
- Placement on a housing waitlist
- Other _____

20. What is the client’s preferred housing location(s)?

21. Based on the client’s household size, what unit best fits the client’s needs?

- Studio
- 1 bedroom
- 2 bedrooms
- 3+ bedrooms
- Other

22. Based on the client’s budget, what is the monthly maximum rental amount that the client can afford?

- \$100-\$300 \$300-\$500 \$500-\$700 \$700-\$900 \$1000+

23. Does the client have any other specific housing needs? Please describe below.

Part V: Rental Assistance

24. Is there an eviction notice or utility shut-off notice?

Yes

No

If yes, please provide more detail _____

25. Is the client's inability to pay rent situational (e.g. recent loss of job, unexpected expense such as car repair, loss of roommate)? Please explain.

26. Is the client's inability to pay full rent an ongoing circumstance (e.g. rent increase, inability to work due to health reasons, divorce or separation)? Please explain.

27. Determine how much of the monthly rent can be paid by the client.

\$ _____

Part VI: Completed Assessment

Based on the full assessment, the client will benefit from the following services as a participant in the HPP (check all that apply):

- Legal Assistance
- Rental Assistance as determined by program (based on the need of the client)
- Employment Services
- Personal Skill Related Services (budgeting, tenant skills or payee services)
- Housing Locator Services

_____	_____	_____
Client Name (print)	Signature	Date
_____	_____	_____
Housing Specialist Name (print)	Signature	Date

Housing Plan

Client Name: _____

ARIES ID: _____

Housing Specialist Name: _____

Date: _____

Primary housing barriers:	Plan to increase household income:	Plan to decrease household expenses:
1 _____	1 _____	1 _____
2 _____	2 _____	2 _____
3 _____	3 _____	3 _____
4 _____	4 _____	4 _____

Housing Plan Goal: _____ → → →	Assigned to	Start date	Target date	Check-in date	Status	Status date
Tasks: 1 _____						
2 _____						
3 _____						
4 _____						
5 _____						

Housing Plan Goal: _____ → → →	Assigned to	Start date	Target date	Check-in date	Status	Status date
Tasks: 1 _____						
2 _____						
3 _____						
4 _____						
5 _____						

Housing Plan Goal: _____ → → →	Assigned to	Start date	Target date	Check-in date	Status	Status date
Tasks: 1 _____						
2 _____						
3 _____						
4 _____						
5 _____						

Client Signature: _____

Housing Specialist Signature: _____

Housing Acuity Scale

Directions: If a question is not applicable, please answer “No”. Follow the scoring directions below and add up the total points and include the total into the Acuity Score box within ARIES. The client’s answers will help determine the effectiveness of this program and be useful for future improvements.

Questions – if the question is not applicable, please check “No”.	Yes	No
1. Have you been employed and receiving regular income for more than six months?	<input type="checkbox"/>	<input type="checkbox"/>
2. Have you been able to pay rent on time and in full each time in the past six months without HPP assistance?	<input type="checkbox"/>	<input type="checkbox"/>
3. Have financial barriers (poor credit history, criminal history, foreclosure, or eviction or threat of eviction) decreased for you in the past six months?	<input type="checkbox"/>	<input type="checkbox"/>
4. Have employment barriers (job search skills, limited technical or vocational skills, or English proficiency) decreased for you in the past six months?	<input type="checkbox"/>	<input type="checkbox"/>
5. Have your relationships with your landlord, roommate(s), neighbors or employer improved over the past six months?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you feel that your landlord is approachable and reliable in addressing repairs, ground maintenance, and neighborly disputes?	<input type="checkbox"/>	<input type="checkbox"/>
7. In your current residence, are there two or less people per bedroom?	<input type="checkbox"/>	<input type="checkbox"/>
8. In the past year, have you moved less than three times?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you feel you will be able to pay rent without short-term or emergency rental assistance moving forward?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you plan on living in your current residence for at least a year?	<input type="checkbox"/>	<input type="checkbox"/>
Scoring		
Please add the numbers of checks for “Yes” for question 2 and 9 (Yes – 10 points each; No – 0 points)		
Please add the numbers of checks for “Yes” for question 1, 3-8 and 10 (Yes –1 point each; No –0 points)		
Total Points (<i>Maximum score: 28 points</i>)		

***Enter the total points in the Acuity Scale table under the Medical tab, Basic Medical Subtab in ARIES.**

Client Name (print)

ARIES ID

Date