



California Department of Public Health
Office of AIDS

Housing Plus Project (HPP) Onboarding Webinar

September 29, 2020

2:00 P.M. - 3:30 P.M.

Presenters

Alexandria Andrews

Health Program Specialist

Alexandria.andrews@cdph.ca.gov

Karl Halfman

Chief, HIV Care Branch

Karl.Halfman@cdph.ca.gov

Jessica Heskin

Chief, Care Program Section

Jessica.Heskin@cdph.ca.gov

Welcome and Housekeeping



Is this webinar being recorded? Yes!
Recording will be sent out to all participants following the call.



Attendance: Please enter your organization name and attendee name(s) in chat box.



Mute: If you are not speaking, please make sure to mute your line to mitigate background noise.



Questions: Use the Chat Box to type questions during the webinar or unmute your line.

Agenda

Introductions and Housekeeping

Program Overview

Program Requirements: administrative requirement, reporting requirements, client eligibility, allowable services and required staffing

Rental Assistance

Program Forms

Fiscal Requirements

Data Collection

Questions

Program Overview

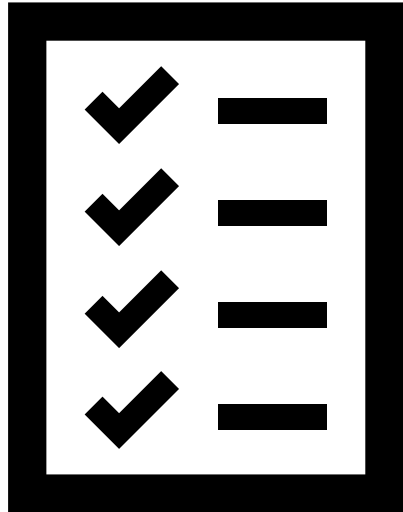
Program Overview

- ▶ In 2015, the CA Legislature reallocated a portion of Ryan White (Part B) base funding from the AIDS Drug Assistance Program (ADAP) to the HIV Care Program (HCP)-increasing the number of HIV-positive people of color who are engaged and retained in HIV care and treatment.
- ▶ Please note -HPP serves clients regardless of their race or ethnicity.
- ▶ 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.
- ▶ HPP will run through March 31, 2025, pending available funding.



Program Requirements

Administrative Requirements



- ▶ 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.

Reporting Requirements and Technical Assistance

| 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 | Frequency |
| 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 |

Client Eligibility

Clients participating in the HPP must 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 Ryan White HIV/AIDS Program (RWHAP) Part A or B
- ▶ Have a current temporary living situation or at risk of becoming unstably housed

Client Eligibility

Living Situation and Stability

- ▶ Determining a client's living situation and stability may not always be clear-it's important to ask questions about the client's present status
- ▶ Temporary Living Situation examples: Transitional Housing, Psychiatric facility, Substance abuse treatment facility, Hospital or other medical facility, Living with relatives/friends
- ▶ Stability
 - Unstable (not eligible for HPP)
 - Temporary (may be eligible for HPP)
 - Stable/Permanent (may be eligible based on situation)
- ▶ At risk of becoming unstably housed-client 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.).

Client Eligibility-Living Situation and Stability

| Living Situation | Unstable | Temporary | Stable/Permanent |
|-------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Rental housing | | | <p>Renting and living in a house or apartment</p> <p>Subsidized, non-HOPWA, house or apartment, including 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> |
| Participant-owned housing | | | 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 | | | Renting and living in an unsubsidized room |
| Refused to answer | | | |
| Other | Hotel or motel paid for with emergency shelter voucher | <p>Hotel or motel paid for without emergency shelter voucher</p> <p>Other temporary arrangement such as a RWHAP housing subsidy</p> | <p>Housing Opportunities for Persons with AIDS (HOPWA)-funded housing assistance, including Tenant-Based Rental Assistance or Facility-Based Housing Assistance, but not including the Short-Term Rent, Mortgage and Utility Assistance Program.</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> |

Allowable Services



- Clients may receive any combination of these services based on the Housing Assessment and the client's needs:
 - ▶ *Personal Skill Related Services (Client Personal Budgeting, Tenant Communication/Skills, Payee Services, Other Financial Management Services)*
 - ▶ *Legal Services*
 - ▶ *Employment Services*
 - ▶ *Housing Assistance (Rental Assistance, Housing Availability Information)*
- ▶ Housing Assistance is not a prerequisite for receiving other supportive services

Rental Assistance

- ▶ Rental assistance provided under HPP is intended to prevent homelessness of Ryan White clients
- ▶ Rental assistance is **not** automatically provided to all HPP clients and should not be used as an on-going subsidy
- ▶ Providers should develop internal policies for determining caps on rental assistance
- ▶ Clients who have received previous housing assistance (such as HOPWA)
- ▶ If a client is currently receiving housing assistance, they are not eligible for HPP rental assistance

Rental Assistance

- ▶ Clients receiving rental assistance must meet the following criteria:
- ▶ Show satisfactory evidence of tenancy which 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
- ▶ Demonstrate a need for the assistance which can include:
 - ▶ Record of actual monthly bills recurring costs and evidence of the limited nature of household income
 - ▶ Completed Housing Assessment which includes current, previous, and future financial situation
 - ▶ Default/late payment notice that identifies the client as a named tenant

Rental Assistance

The following costs are not allowable under HPP:

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

Rental Assistance

► Examples of client rental assistance needs:

1. Client A has been living in their apartment for the last 5 years. Their work hours were reduced and they are unable to pay their rent in full. They are in the process of looking for new full-time employment and will need help with rental assistance during this process.
2. Client B has been renting an apartment, but just recently found out that the landlord is increasing rent. They are requesting rental assistance and housing location services to help them find more affordable housing.
3. Client C shares an apartment with their cousin and just recently found out their cousin is moving out. The client is considered permanently housed; however, is now at risk of homelessness because they cannot afford rent on their own. They are requesting rental assistance for the next three months as they seek a new roommate.

Required Staffing



Housing Specialist (Minimum 1.0 FTE)

- ▶ Focuses on keeping clients permanently and stabled housed
- ▶ Is not a Case Manager-should only assist client with housing related needs and services
- ▶ Duties include comprehensive housing planning, case conferencing, documentation and data entry

Housing Locator (Minimum of 0.5 FTE)

- ▶ Locates affordable housing units for clients, builds partnerships with landlords, and increases accessibility to other housing programs
- ▶ Experience in property management, housing management, and/or real estate
- ▶ Maintains an ongoing list/directory of affordable housing complexes and units

Program Forms

The background features abstract geometric shapes, primarily triangles, in shades of olive green and burnt orange. These shapes overlap and intersect, creating a modern, layered effect. The text 'Program Forms' is centered in a bold, green, sans-serif font.

Program Forms

- ▶ Required set of standardized forms to collect client information
- ▶ Information on the forms cannot be modified; however, additional forms can be used to fit the needs of your agency
- ▶ Must maintain copies of the completed forms in the client's file or upload them to an electric medical record system in ARIES
- ▶ All printable forms will be accessible through www.projectaries.org
- ▶ A “Release of Information” form must be completed by the provider and signed by the client prior to sharing any forms or client data with an outside agency.

Screening Tool

- ▶ Form should be provided to all Ryan White Case Managers in your agency
- ▶ The RWHAP Case Manager is required to complete the Screening Tool prior to referring a client to HPP services
- ▶ After completing the Screening Tool and determining eligibility, the Case Manager should securely submit the form to the HPP Housing Specialist

Housing Assessment

- ▶ The Housing Specialist will work directly with the client to complete the Housing Assessment at intake.
- ▶ The document will assess the following:
 - ▶ Barriers to stable housing
 - ▶ Financial income and budget
 - ▶ Long-term housing goals
 - ▶ Rental assistance needs (if applicable)
- ▶ The budget located within the Housing Assessment is required to be reassessed at a minimum of every six months.

Housing Plan

- ▶ Created in partnership with the client to assist the client with achieving attainable housing-focused goals
- ▶ Addresses barriers to obtaining and maintaining housing by developing goals, action steps and target completion dates
- ▶ Should be completed and reassessed:
 - ▶ At the time of intake
 - ▶ A minimum of every six months *or*
 - ▶ When the client accomplishes a milestone on their plan

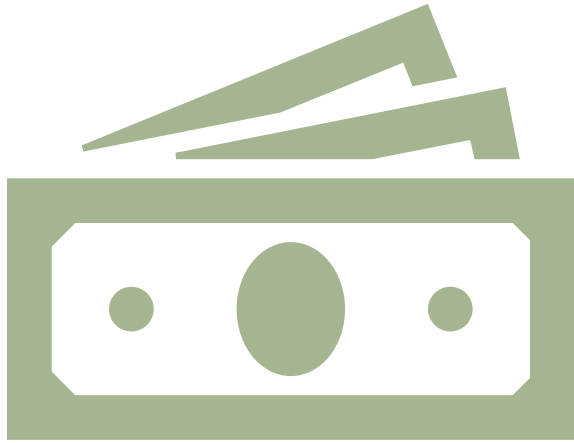
Housing Acuity Scale

- ▶ Set of 10 questions that will help the Housing Specialist assess the client's current housing acuity
- ▶ Housing Specialist will ask the client the questions and tally the count of "Yes" responses
- ▶ Final score will be entered into ARIES and the overall score will be used to evaluate the client's progress in the program over time
- ▶ The tool must be completed:
 - ▶ At the time of intake
 - ▶ A minimum of every six months
 - ▶ At the completion of HPP services

Fiscal Requirements



Fiscal Requirements



- ▶ 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 (HCP Budget Guidelines will be released soon)
- ▶ Providers will include HPP expenditures as part of their quarterly HCP invoices submitted to OA
- ▶ Invoices and backup documentation should not include client names or other personal identifiers

Questions



Data Collection

The background features abstract geometric shapes, primarily triangles, in shades of olive green and burnt orange. These shapes overlap and intersect, creating a dynamic, layered effect. The colors are muted and earthy, contributing to a professional and modern aesthetic.

Overview

- ▶ Providers must enter data about their clients and services into the AIDS Regional Information and Evaluation System (ARIES). These data will be:
 - ▶ Used to evaluate HPP's effectiveness,
 - ▶ Reviewed during compliance monitoring, and
 - ▶ Included in each provider's annual Ryan White Services Report (RSR).
- ▶ This section presumes some baseline knowledge of ARIES. For more details or to required data elements, read the *HPP Program Guidance*.

Accessing ARIES

- ▶ If you don't already 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 Client 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.
- ▶ 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 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)

If do not enter the same identifiers that are already in the system, a duplicate record will be created...

ew Reports Shortcuts Help Logout

TRAINING OA TRAINING OA TRAINING OA TRAINING

EMULATING OA TRAINING AGENCY 1 EMULATING OA TRAINING

Client URN

To check if this client may already be registered in ARIES, please accurately enter the following data:

Last Name * Simpson

First Name * Bart

Middle Initial J

Mother's Maiden Name Bouvier

Date of Birth * 2/23/1981

Current Gender * Male

Search >

Don't use Bartholomew or El Barto

Don't leave his middle initial blank if it isn't

Don't leave his mother's maiden name blank if it isn't

...and you won't be able to see the record that is already in the system for share clients.

“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. The form is available at www.projectaries.org/resources.
- ▶ 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](#)).

Focus on Key Data Elements

- ▶ There are 47 required data elements. The HPP Minimum Dataset list can be found in the *HPP Program Guidance*.
- ▶ We will next focus on how to enter some key data elements. For more details, please read the *HPP Program Guidance*.

Living Situation & Stability Scale

- ▶ 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.
- ▶ To enter this information into ARIES, 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.

Living Situation & Stability Scale

| OA TRAINING EMULATING OA TRAINING AGENCY 1 | | | OA TRAINING EMULATING OA TRAINING AGENCY 1 | | | OA TRAINING EMULATING OA TRAINING AGENCY 1 | | | OA TRAINING EMULATING OA TRAINING AGENCY 1 | | | OA TRAINING EMULATING OA TRAINING AGENCY 1 | | |
|-----------------------------------------------|--|---------------------------------|-----------------------------------------------|--|--|-----------------------------------------------|--|--|-----------------------------------------------|------------------------------|--|-----------------------------------------------|--|--|
| Bart J Simpson Living Situation | | | | | | | | | | | | | | |
| As Of Date * | | Living Situation | | | | Stability Scale * | | | | Save Cancel Deactivate | | | | |
| 9/1/2020 | | Living with relatives/friends ▼ | | | | Temporary ▼ | | | | | | | | |
| 12/19/2019 | | Rental housing | | | | Stable/Permanent | | | | | | | | |

- ▶ 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, refer to the *HPP Program Guidance*.

Client 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.

Client Income

OA TRAINING EMULATING OA TRAINING AGENCY 1 OA TRAINING EMULATING OA TRAINING AGENCY 1 OA TRAINING EMULATING OA TRAINING AGENCY 1 OA TRAINING EMULATING OA TRAINING AGENCY 1

Financial for Bart J Simpson

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"/> | <input type="text" value="other 1"/> | <input type="text"/> |
| Gen Assist/Gen Relief GA/GR | <input type="text"/> | Veterans Benefits/VA | <input type="text"/> | <input type="text" value="other 2"/> | <input type="text"/> |
| Unemployment/UI | <input type="text"/> | Alimony/Child Support | <input type="text" value="360.00"/> | <input type="text" value="other 3"/> | <input type="text"/> |
| Total | <input type="text" value="1235.00"/> | <input type="checkbox"/> No source of income | | Food Stamps | <input type="text"/> |

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

Household Income

- ▶ 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 eventually calculate the Federal Poverty Level.
- ▶ When you reassess income, type over data fields that have changed.



HOUSEHOLD INCOME

Monthly Household Income *

People in Household *

Children in Household

Percent Federal Poverty Level

HIV+ People in Household

Income History

- ▶ 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.

| Date | Monthly Client Income | Monthly Household Income | Monthly Family Income |
|----------|-----------------------|--------------------------|-----------------------|
| 9/1/2020 | 1235.00 | 2955.00 | 0.00 |

Save Cancel


- ▶ When you Save the screen, notice that ARIES returns the Federal Poverty Level for the household.

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.
- ▶ To enter this information in ARIES, go to Medical > Basic Medical and click Edit. Then scroll down to the Acuity Scale section at the bottom of the screen. Click New.

Acuity Scale

- ▶ Select Housing Acuity Scale under Acuity Scale, enter the total points you calculated on the tool under Acuity Score, and enter the date the tool was completed. Click Save.

| Acuity Scale | Acuity Score | Acuity Date | |
|------------------------|--------------|----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| Housing Acuity Scale ▼ | 12 | 5/1/2020  | <input type="button" value="Save"/> <input type="button" value="Cancel"/> |

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

Services

- ▶ 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.
- ▶ 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.
- ▶ Then select the most appropriate Primary Service and Secondary Service. For a list of services and descriptions on when to use them, please refer to the *HPP Program Guidance*.

Tracking Rental Assistance - an extra step


- ▶ The only service you must track costs for is 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.

Service

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

Staff Halfman, Karl ▼

Site Midtown Clinic ▼

Date of Service * 9/1/2020 

Days to Next Service **date** 

Contract Name * Housing Plus 20/21 CA/OA ▼

Program Ryan White HPP ▼

Primary Service * Housing Assistance ▼

Secondary Service Rental Assistance ▼

Agency Subservice Rental Assistance ▼

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)

Save

Cancel

Deactivate

Further Assistance with ARIES

- ▶ Read the Data Collection section of the *HPP Program Guidance*.
- ▶ Review the HPP Minimum Dataset in the *HPP Program Guidance* for a list of the data needed for HPP.
- ▶ 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.

Questions



Contact Information

- ▶ Alexandria Andrews
- ▶ Email: Alexandria.andrews@cdph.ca.gov

- ▶ Jessica Heskin
- ▶ Email: Jessica.Heskin@cdph.ca.gov

Thank you!