

Problem-Solving Access Points Guide

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Purpose

The Housing Problem-Solving Access Points (PSAPs) Guide is designed for staff trained in the housing problem-solving approach to be able to serve people in housing crises. By engaging in problem-solving conversations, agencies will connect households to existing supports, community supports, limited financial assistance and services to help resolve housing instability or homelessness.

Introduction

Sacramento Steps Forward and the Continuum of Care are developing a community-wide effort to integrate housing problem-solving (HPS) services into the homeless response system. This approach aims to preserve limited shelter and supportive housing interventions for households without quick, safe alternatives, while also reducing the inflow of people entering the system and the length of time people experience homelessness.

Agencies who provide these services will act as a housing problem-solving access point, integral to the homeless response system. This approach aims to address the vast need, acknowledging that far more people request housing assistance than can be referred to housing through the Continuum of Care's Coordinated Entry System. Housing problem-solving should always be attempted as the very first intervention with households seeking assistance from the homelessness system.

Services

Housing problem-solving services and supports can include mediation and conflict resolution with family, friends, and/or landlords, connections to mainstream resources, housing location assistance, housing stabilization planning, family reunification.

Financial Assistance

In limited cases, housing problem-solving financial assistance that directly results in housing being secured can be provided, including security deposit, rental arrears, first-month's rent, utilities arrears, etc. (see list of eligible costs p. 11). This option should only be utilized after all other options have been explored and if the provision of financial assistance will directly result in the household being immediately housed. Due to both resource limitations and the volume of need, decisions about when to rely on those resources should be made carefully. Financial assistance must be prioritized for those who do not have alternate resources available to them.

Housing Problem-Solving Approach

Step 1: Conduct a housing problem-solving conversation

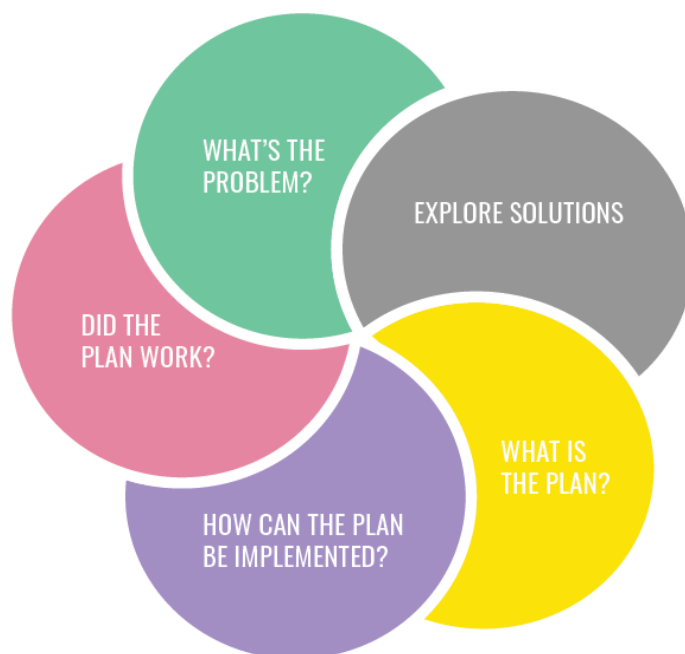
Conduct an exploratory conversation with the household to support them in identifying creative solutions to resolve their housing crisis. For PSAPs who receive 211 referrals, households will have been prescreened for eligibility for assistance, but 211 is not able to collect verification. PSAPs are still responsible for having an HPS conversation with the household to ensure eligibility and that all options have been explored prior to offering financial assistance. Some things to consider:

- Use active listening
- Allow the household to share their story without interruption to gather information about their housing history, support networks, income and safety/appropriateness of housing
- Follow a strengths-based approach
- Focus on identifying any and all options and resources, including mediation and conflict resolution with family, friends, and/or landlords, connections to mainstream resources, housing location assistance, housing stabilization planning, family reunification, and, in limited cases, financial assistance that directly results in housing being secured.

Below is an example of how to frame the conversation:

“Before we begin to talk about your situation, I want to let you know that each person/family that I meet with will have their own unique outcome. What worked for someone else might not be the best approach for you.”

Figure 5.1. Problem-Solving Conversation Guidance



The Problem-Solving process often requires a series of steps. The figure above is intended to guide staff engaged in Problem-Solving conversations.

Each step motivates and empowers the household to self-identify how to resolve their housing crisis:

- ① Identify the factors contributing to the household's housing crisis.
- ② Once the core of the problem is identified, collaboratively brainstorm alternative solutions.
- ③ Develop an appropriate plan based on the household's unique situation.
- ④ Provide the necessary support, tools, and guidance to work towards a solution.
- ⑤ Use progressive engagement to evaluate the success of the intervention.

Step 2: Determine level of eligibility

Eligibility criteria for housing problem-solving support **services**:

- 18 and older,
- Experiencing homelessness, fleeing/attempting to flee from domestic violence, sexual assault and human trafficking, or at-risk of homelessness (see definitions on p. 11)*

Eligibility criteria for housing problem-solving **financial assistance**:

- If a household meets the above eligibility criteria, if other options have been exhausted, and the financial assistance leads to a housing crisis resolution, including:
 - Permanent housing on their own
 - Viable, safe permanent housing with family and/or friends
 - Viable, safe housing with family and/or friends, with a plan for permanency
 - Remaining stably housed after being at-risk of homelessness

and one of the following:

- Seeking one-time financial assistance to remain housed or secure identified housing; or
- Has a housing choice voucher or other rental subsidy and needs support securing housing.

*See definitions on page 9

Step 3: Enroll the household in the PSAP program

1. Create a client profile in HMIS, if they do not already have one. Note: Victim-service providers or any survivors entered into HMIS will need anonymous profiles.
2. Enroll the client in your agency's PSAP program.
3. Log any services that are provided.
4. If the client's housing crisis can be resolved with one-time financial assistance and all other options have been explored, complete the 'Problem Solving- Request for Financial Assistance' under Assessments.

Step 4: Request financial assistance (if needed)

Prior to requesting financial assistance, staff will have explored other options and determined that use of one-time funds will assist in resolving the household's housing crisis.

1. Refer to the Financial Assistance Chart (p.11) for a list of eligible categories and required documents.
 - a. Financial assistance funds can be requested for more than one category, but all items should be submitted in one request even if payment for items needs to be separate (i.e. debt needs to be paid first before household items are purchased).
2. Complete a Financial Assistance Request Assessment (see HMIS processes), upload all required documents under the 'Files' tab and send a notification email to psaps@sacstepsforward.org. Furniture requests are submitted through a separate form that will need to be uploaded to HMIS. Please utilize the SSF-issued W-9 form.

3. The request will be reviewed and approved by SSF. If there are missing documents or items are ineligible, the request may be sent back for additional verification. Approved requests will be recorded by SSF at the bottom of the financial assistance request assessment. Check mailed dates will be recorded in the client's service history.
4. For items that require an invoice, proof of pricing or estimate, submit the request with the estimate for approval and notify psaps@sacstepsforward.org of the need. After SSF approves, the agency is able to purchase the items and then will submit an invoice to accounting@sacstepsforward.org, no later than the tenth (10th) day of the month following the invoice period.
5. Requests must be submitted before end of day Tuesday to be processed by the following week. If approved, SSF will send a check to the verified third parties on the following Tuesday.
6. Move-in kits must be picked up by the PSAP provider.

Financial assistance requests will be approved for eligible households if the items requested are listed on the Financial Assistance Chart and applicable documentation is uploaded into HMIS. Services that have been logged in HMIS will be reviewed, along with how the financial assistance requested will help resolve the household's housing crisis and how the household will continue to financially sustain their housing situation. Once approved, SSF will distribute a check to the PSAP or verified third party no later than 10 business days after receiving the approved financial assistance request.

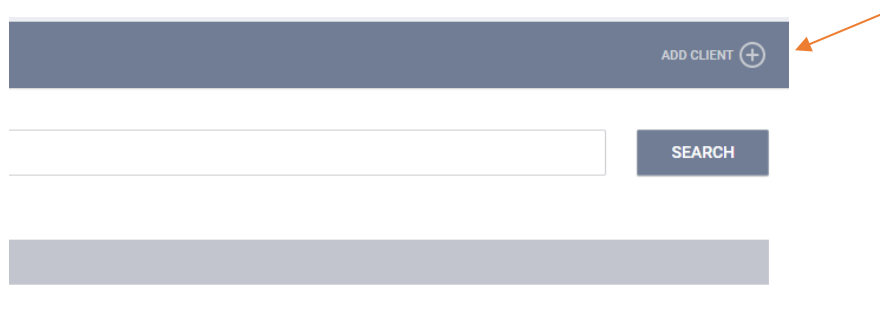
Step 5: Exit the household from the PSAP program

1. Once the client's housing crisis is resolved or they have been connected to another service provider, staff will exit the client from the PSAP program. Programs may opt to keep a client enrolled for a certain amount of time to ensure they are connected. Exits can also occur if contact with the client has been lost.

HMIS Steps

Creating a Client Profile

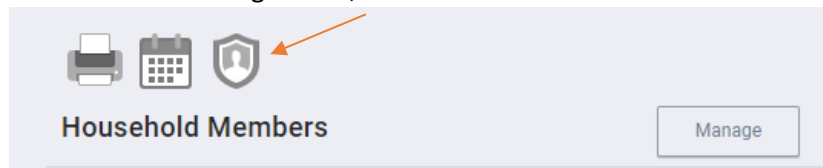
1. Log into [HMIS](#), under your agency's PSAP. Only log into the Sacramento CoC Coordinated Entry agency when enrolling a client into the PSAP program and submitting financial assistance requests.
2. Before creating a new profile, check if the person is already in HMIS:
 - Enter the first 3 letters of first and last name (or date of birth, last four numbers of their social security number) in the search bar
3. If you are unable to find the client, click 'Add Client' to create a new profile.



The screenshot shows a dark blue header bar with the text 'ADD CLIENT (+)' on the right. Below this is a white search input field followed by a dark blue 'SEARCH' button. Below the search bar is a light gray rectangular area, likely a placeholder for search results.

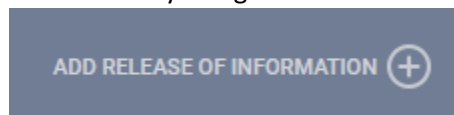
4. Before entering in data, obtain the client's consent for their information to be shared with partner agencies in HMIS:
 - a. For existing clients:

- If the client is missing an ROI, click the shield icon.



The screenshot shows a light blue section titled 'Household Members'. It contains three icons: a printer, a calendar, and a shield. An orange arrow points to the shield icon. To the right of the icons is a 'Manage' button.





- Add an ROI by using the 'Add release of information' function.



The screenshot shows a dark blue button with the text 'ADD RELEASE OF INFORMATION (+)'.

- b. For new clients:

- Virtual: In the Release of Information section, select the 'Electronic Signature' under the Documentation drop-down list. Review the HMIS consent form with the client. If they consent, selection Permission: yes and switch to the 'Verbal Consent' option under the Documentation drop-down list.

RELEASE OF INFORMATION	
Permission	Yes 
Start Date	04/21/2021 
End Date	04/21/2028 
Documentation	Verbal Consent 

- In person: Review the Release of Information form with the client. If the client agrees to have their information shared, add Permission: yes and choose the appropriate form of documentation. Upload any forms under the 'Files' tab.

Note: If the client does not consent – you can still create the profile but you will make it a private record by selecting 'Permission: No'. This means only 211 can view their information. For existing clients that would like to switch from public to private, contact hmis@sacstepsforward.org.

5. Click the 'Notes' tab to add that verbal consent was obtained, how information was verified, reason (i.e. 2-1-1 cannot meet the client in person). The receiving agency should later obtain a hard copy with signature.
6. Complete all data fields. If the client does not know or the client refuses to respond to the question, most data elements include a 'Client doesn't know' or 'Client refused' response category.
 - Contact information should be placed under the 'Contact' tab, as the phone number and email address profile fields will soon be discontinued.
7. Click 'Add Record' at the bottom of the page to save the record.


Creating an Anonymous Client Profile

1. To create an anonymous profile where the client does not want to share any information use the following: SSN -0000, DOB- 1/1/year of their birth; If referred, share their unique identifier. This is required for any victim-service providers inputting clients into HMIS.

Adding Availability (for PSAPs receiving 211 referrals)

1. Log in under the Sacramento CoC agency
2. Select the 'Referrals tab'
3. Under 'Availability' select the 'Supportive Services Queue'

Program Availability

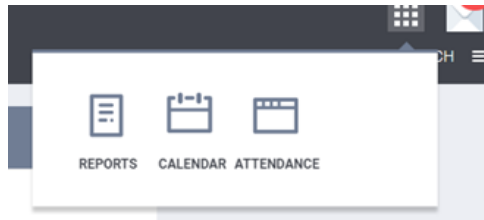
CalAIM	CES Housing Queue CA-503 aka Community Queue	CES Shelter Queue CA-503	Supportive Services Queue 
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4. Select 'Limited Availability' under your shelter program
5. Click 'Add single or multiple openings' (multiple openings will indicate identical bed information)
6. Complete the date field and notes section with staff contact information.

7. Click 'Save Changes'

Logging the intake appointment outcome (only for PSAPs receiving 211 referrals)

1. Click on the 'Attendance' screen

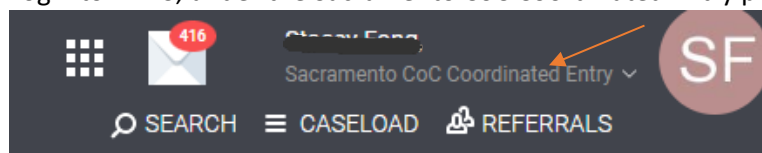


2. Click reservation to the right of the *Intake Appointment: PSAP - 'your' agency
3. Click the blue 'Reserve' button next to the client's DoB
4. On the right side of the screen, select 'Present' or 'No show' (clicking on either field will instantly update the record)
5. For no-shows, update the referral status (see the step "Denying the Referral")
6. For clients who were able to be reached, and are seeking services, enroll the client.

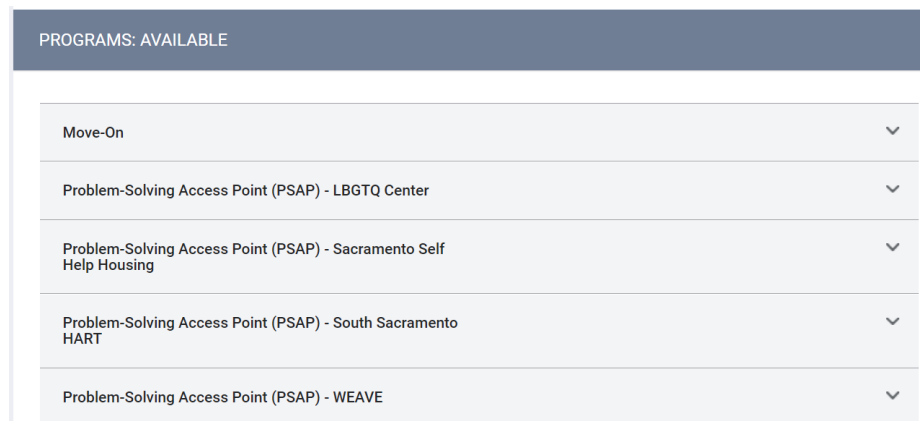
Enrolling a Client into a PSAPs Program

(for PSAPs receiving 211 referrals, this closes the referral)

1. Log into HMIS, under the Sacramento CoC Coordinated Entry program



2. Under the Programs tab, select your PSAP program and click 'enroll'



Denying the Referral (only for PSAPs receiving 211 referrals):

Closes out the referral and reopens the bed slot

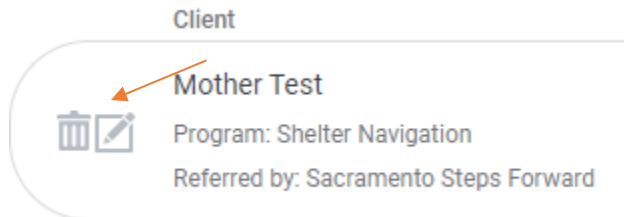
1. Under the 'Referrals' tab, select the 'Pending' to see all clients currently pending referrals for your agency



Dashboard Pending Completed Denied Sent

Program Availability

2. Hover over the client until the edit icon (box with a pencil) appears



3. Click on the edit icon and scroll down to the status line – change the status to “denied” (default)
 - a. Denied by Type: select ‘client’ if it was a no-show, ineligible, or client no longer wanted PSAP services. Select ‘provider’ for all other reasons as applicable.
 - b. Denied Reason: Select the appropriate response for the denial and provide any additional information in the text box.

Status	Denied	▼
Denied By Type	-- Select --	▼
Denied Reason	Select	▼
Denial Information	<input type="text"/>	
Private	<input type="checkbox"/>	

SAVE CHANGES

CANCEL

4. Once the referral has been updated, click ‘Save Changes’

Logging Housing Problem-Solving Services (Required)

1. Select the 'Services' tab, and select the dropdown list of available services:

Services

Case Management: General	Case Management ▼
Clothes	Health Care ▼
Emergency Assistance	Financial ▼
Food	Food ▼
Housing Problem Solving	Case Management ▼
SSF ONLY - Financial Assistance Provided	Financial ▼
Transportation	Transportation ▼

Logging General Services (Recommended, as needed)

1. Select the 'Services' tab, and add the service provided with any applicable information.

PROFILE PROGRAMS HISTORY FILES CONTACT LOCATION NOTES **SERVICES** ASSESSMENTS

*Intake Appointment	Other ▼
Alcohol & Drug Abuse Services - RAPS	Alcohol and Drug Abuse ▼
Coordinated Entry Event	Coordinated Entry Event ▼

Note: recording a service at least once per month for the client will retain their active status on the by-name list and community queue. Clients without a logged service within 90 days are auto-exited from the program.

Requesting Financial Assistance

1. Log into HMIS, under the Sacramento CoC Coordinated Entry program.
2. Enter the client's name in the 'Search for your Client' box and click 'Search'
3. Under the 'Assessments' tab, start the 'Problem Solving- Request for Financial Assistance' assessment

PROFILE PROGRAMS HISTORY FILES CONTACT LOCATION NOTES SERVICES **ASSESSMENTS**

ASSESSMENTS

Move On Survey	START
Problem Solving - Request for Financial Assistance	START
Sacramento - VI-F-SPDAT Prescreen for Families [V2]	START

4. Enter the assessment date and staff contact information
5. Click the toggle button for any financial assistance items being requested, and enter in the applicable amount. Note: more than one item can be requested even if they will be paid at different times.

REQUESTING FINANCIAL ASSISTANCE FOR THE FOLLOWING: (CHECK ALL THAT APPLY.)

Application Fees ☐

Security Deposit ☒ Security Deposit Amount

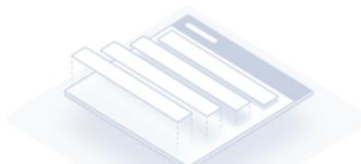
Rental Assistance (1st Month) ☒ Rental Assistance Amount

6. Required documents will show up under 'Documentation Needed for Eligibility Documentation.' Toggle the button once they are attached.
7. To upload documentation:
 - a. Under the 'Programs' tab, hover to the left of the program name and click on the edit icon
 - b. Select the 'Files' tab and add documentation.

Note: PDF is the preferred format for documents to be uploaded.

Enrollment History Provide Services Notes **Files** Forms

Client Program Files



8. At the end of the assessment, there are two required responses for how the financial assistance will resolve the household's housing crisis and how they are able to sustain housing once the financial assistance ends.
9. Send a notification email with the client's unique identifier to psaps@sacstepsforward.org.

Exiting a Client

1. From the Programs tab in the client file, find the program you wish to exit your client from
2. and select the Edit option.
3. Next, select 'Exit' on the right-hand side of the program menu

Enrollment **History** Notes Files Forms

✕ Exit



4. Complete all data on the 'End Program' screen.
5. Select save and close.

Definitions

Homelessness

1. Currently living in an emergency shelter, a place not meant for human habitation (e.g., cars, parks, abandoned buildings, streets), transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs or is exiting an institution where (s)he has resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution.
2. Will imminently lose their primary nighttime residence, provided that:
 - a. Residence will be lost within 14 days of the date of application for homeless assistance
 - b. No subsequent residence has been identified
 - c. The household lacks the resources or support networks needed to obtain other permanent housing
3. Unaccompanied youth under 25 years of age, or families with children and youth, who do not otherwise qualify as homeless under this definition, but who: (i) Are defined as homeless under the other listed federal statutes; (ii) Have not had a lease, ownership interest, or occupancy agreement in permanent housing during the 60 days prior to the homeless assistance application; (iii) Have experienced persistent instability as measured by two moves or more during in the preceding 60 days; and (iv) Can be expected to continue in such status for an extended period of time due to special needs or barriers.
4. Individuals or families who are fleeing, or attempting to flee, domestic violence, dating violence, sexual assault, stalking or human trafficking, has no other residence; and lacks the resources or support networks to obtain other permanent housing.

At-Risk of Homelessness

1. Has an annual income below 30% area median income;
2. Does not have sufficient resources or support networks immediately available to prevent them from moving to an emergency shelter or into homelessness; and
3. Meets one of the following conditions:
 - a. Has moved because of economic reasons two or more times during the 60 days immediately preceding applying for homelessness assistance;
 - b. Is living in the home of another because of economic hardship;
 - c. Has been notified in writing that their right to occupy their current housing or living situation will be terminated within 21 days of the date of application for assistance;
 - d. Lives in a hotel or motel that is not paid for by charitable organizations or by federal, State, or local government programs for low-income individuals;
 - e. Lives in a single-room occupancy or efficiency apartment unit with more than two people, or lives in a larger housing unit in which there reside more than 1.5 people per room.

- f. Is exiting a publicly funded institution, or system of care (such as a health-care facility, a mental health facility, foster care or other youth facility, or correction program or institution);

Income Limit -30% Annual Median Income (AMI)

Household Size	1	2	3	4	5	6	7	8
Income Limit (30% AMI)	\$22,550	\$25,750	\$28,950	\$32,150	\$34,750	\$37,300	\$39,900	\$42,450
Monthly Income	\$1,879	\$2,146	\$2,413	\$2,679	\$2,896	\$3,108	\$3,325	\$3,538

updated 9/14/23

Problem-Solving Financial Assistance Chart: Eligible Categories
(see [PSAP Financial Assistance Documentation Checklist](#))