Number: HFRRH-01	**Program:** Housing First/Rapid Re-Housing
Issue Date:	**Subject:** Assessment for Housing-Based Case Management
Revised Date:	

This service standard outlines the requirements that must be met in the delivery of programs and services under the Kingston/Frontenac Housing and Homeless Services System. It serves as a reference when developing in-house policies and procedures to ensure that compliance is achieved. This Service Standard pertains to the following program area:

- ☐ Homeless Prevention/Diversion ☐ Adult ☐ Youth ☐ Rural

- ☐ Housing Assistance/Emergency Shelter ☐ Adult ☐ Youth

- ☑ Housing First/Rapid Re-Housing ☑ Adult ☑ Youth ☑ Rural

- ☐ Homelessness Prevention Fund ☐ Adult ☐ Youth ☐ Rural

Reference:

- **10-Year Municipal Housing and Homelessness Plan:**
  - **Recommendation #45**: Implement common intake and assessment protocols and practices.
  - **Recommendation #51**: Develop and adopt a tool to identify which individuals and families are eligible for targeted homelessness assistance.
  - **Recommendation #59**: Prioritize access to available housing for those with the deepest and most chronic needs first.

Rationale:

In a system with finite resources, those resources must be strategically allocated to ensure that they are having the greatest impact. Evidence demonstrates that, among homeless populations, those individuals and families with the highest needs use a disproportionately high amount of emergency resources, including shelter beds, policing, ambulance, and emergency rooms. However, in order to efficiently match the right supports to the right person, there needs to be a system-wide evidence-based and consistently applied assessment process to inform service provision.

Action to be Taken:

For ease of reading, important terms are presented in bold and are defined in HFRRH-01 Schedule A: Definitions.

All clients transferred from Initial Determination of Needs will receive an Assessment for Housing-Based Case Management in a timely fashion. Based on the results, clients may be transferred to Prioritization for Housing-Based Case Management, as described in HFRRH-01 Schedule E: Results of the Assessment.

The roles and responsibilities of all parties involved are outlined below.

The Service Manager will:

- In consultation with Service Providers, research, select or develop, and adopt evidence-informed Assessment Tools, as identified in HFRRH-01 Schedule B: The Assessment Tools;
- Undertake a periodic review of available Assessment Tools to ensure that the selected tools best meet local needs;
- Ensure that Service Providers have the resources required (including information, up-to-date Assessment Tools, initial and ongoing training) to effectively use the Assessment Tools in their services; and,
- Monitor aggregated, system-wide data points described in HFRRH-01 Schedule G: Accountability to ensure that this Service Standard is being upheld.

Service Providers will:

- If indicated in their Service Agreements, designate staff to be part of the Assessment Team, as described in HFRRH-01 Schedule C: The Assessment Team;
- Ensure that the Assessment Team has adequate, appropriate, and up-to-date training on the use of the Assessment Tools;
- Ensure that the Assessment Team uses the Assessment Tools in accordance with guidelines set out in HFRRH-01 Schedule D: The Assessment Process;
- Ensure that the Assessment Team records data in HIFIS in accordance with guidelines set out in HFRRH-01 Schedule F: Documentation in HIFIS; and,
- Monitor aggregated and non-aggregated data points described in HFRRH-01 Schedule G: Accountability at an agency, employee, and client level to ensure that this Service Standard is being upheld.

The Assessment Team will:

- Conduct the Assessment for Housing-Based Case Management, as described in HFRRH-01 Schedule D: The Assessment Process, for all clients transferred from Initial Determination of Needs; and,
- Record the results of the Assessment for Housing-Based Case Management in the Homeless Individuals and Families Information System (HIFIS), as described in HFRRH-01 Schedule F: Documentation in HIFIS.

Exceptions:

Any exception to this Service Standard is documented in the client's case file. Exceptions may be made in the following circumstances:

Client Unavailable for Assessment

There may be instances when a client is transferred to the Assessment Team but is unavailable or unreachable for the Assessment. This may occur when the client becomes institutionalized, leaves town, decides he/she does not want to be assessed, is experiencing a significant health issue, or misses an appointment. In these cases, the Assessment Team must make a reasonable effort to contact/engage the client and document attempts to contact the client. If thirty (30) calendar days have passed since the last time the client interacted with the Housing & Homelessness Services System, the client is assumed to be Unavailable for Assessment, and this status is documented in HIFIS. The Assessment Team must periodically check, through outreach and in-reach, to see if any clients who are unavailable for assessment have become available. Should an unavailable client become available for assessment, the assessment must be completed at the earliest opportunity, and no later than ten (10) business days after the client becomes available.

Assessment over Multiple Sessions

It is understood that the Assessment for Housing-Based Case Management may take an extended period of time to complete, and due to various factors, there will be many occasions when the Assessment cannot be completed in one session. In these cases, the Assessment Team schedules a follow-up appointment at the earliest opportunity, and no later than ten (10) business days. If more than ten (10) business days pass during which there is no contact with the client and the Assessment remains incomplete, the situation will be considered as Client Unavailable for Assessment and the steps under that exception will be followed.

Client Receiving External Comparable Services

Prior to conducting an Assessment for Housing-Based Case Management, or at any point during the Assessment, if the Assessment Worker determines that the client is receiving external comparable services (see HFRRH-01 Schedule A: Definitions), the Assessment Worker obtains consent and contacts the external service provider to determine if a duplication of services would occur if the client were to receive services under the Housing First/Rapid Re-Housing Program or whether services from multiple providers could complement each other and better serve the client. The Assessment Worker completes HFRRH-01 Form A: Determination of Need and Eligibility for Housing-Based Case Management for Clients Receiving External Comparable Services to summarize the data that would support this determination.

The information is then presented by the Assessment Worker to their Team Leader to determine if the client is eligible for the Housing First/Rapid Re-Housing Program. If the Team Leader confirms that the client would be eligible, Assessment for Housing-Based Case Management would proceed as normal. If it is determined that the client would be ineligible, an Assessment with the client is not conducted, and the client and the staff who initiated the transfer to Assessment for Housing-Based Case Management are notified by the Team Leader of this outcome.

Re-Assessments

From time to time, a client may be assessed and, at a later date, experience a change in circumstances prior to the client being assigned a housing-based case manager in the Housing First/Rapid Re-Housing Program. In these cases, any Housing & Homelessness Services System staff may submit a request to the Assessment Team to update a particular client's Assessment for Housing-Based Case Management. (This request may be initiated by an Assessment Worker.) The request must indicate the client's life area(s) that have changed. The Assessment Worker then makes an appointment with the client to verify the need for a re-assessment. This appointment must be set for a date and time no later than ten (10) business days after the request for a re-assessment is submitted. If the Assessment Worker believes that the client's circumstances have changed sufficiently that the total result of the Assessment for Housing-Based Case Management would be altered by at least two (2) points, the Assessment Worker then proceeds with the assessment process as outlined in HFRRH-01 Schedule D: The Assessment Process.

If a period of six (6) months has passed since a client's most recent Assessment for Housing-Based Case Management was completed, and the client is still homeless and has not been assigned a housing-based case manager in the Housing First/Rapid Re-Housing Program, a re-assessment is required.

There are no limits on the number of times that an Assessment for Housing-Based Case Management can be completed.

Internal Reviews:

There are two situations where a client may appeal the result of the Assessment for Housing-Based Case Management, as per Service Standard Gen-20: Request for Internal Review of a Decision:

Service Standard not Followed

In the event that the procedure outlined in this Service Standard is not followed, a client may request an updated Assessment for Housing-Based Case Management.

Changing Circumstances after Determination of Ineligibility

In the event that, as a result of the Assessment for Housing-Based Case Management, an individual is determined to be ineligible for the Housing First/Rapid Re-Housing Program (see HFRRH-01 Schedule E: Results of the Assessment), the client may request an updated Assessment their circumstances change or they feel that other life events may have resulted in increased acuity.

Related Forms:

See related forms section to view these items:

- HFRRH-01 Form A: Determination of Need and Eligibility for Housing-Based Case Management for Clients Receiving External Comparable Services

Related Documents:

See related documents section to view these items:

- HFRRH-01 Schedule A: Definitions
- HFRRH-01 Schedule B: The Assessment Tools
- HFRRH-01 Schedule C: The Assessment Team
- HFRRH-01 Schedule D: The Assessment Process
- HFRRH-01 Schedule E: Results of the Assessment
- HFRRH-01 Schedule F: Documentation in HIFIS
- HFRRH-01 Schedule G: Accountability

Related Service Standards:
- Gen-08: Initial Determination of Needs
- Gen-09: Mutual Expectations Agreements
- Gen-20: Request for Internal Review of a Decision
- HFRRH-02: Prioritization for Housing-Based Case Management

Approval Authority:

_____

Sheldon Laidman, MCIP RPP

Director, Housing & Social Services Department

If you have any questions, please contact a Housing Programs Administrator,

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362 Montreal Street, Kingston, ON K7K 3H5
Phone: 613-546-2695 ext. 4907
Fax: 613-546-2623

HFRRH-01 Schedule A: Definitions

Acuity refers to a client's level of needs, usually described as either high Acuity, moderate Acuity, or low Acuity. The greater a client's needs, the higher their Acuity. A client's Acuity is determined through the use of an Assessment Tool.

Assessment for Housing-Based Case Management refers to the process outlined in this Service Standard.

The **Assessment Team** is a team comprised of **Assessment Workers**, responsible for conducting all Assessments for Housing-Based Case Management. For more detail, see Schedule C: The Assessment Team.

The **Assessment Tool** (or Assessment Tools) refers to the tool adopted for use across the Housing and Homelessness Services System to determine the Acuity of clients. Currently, the Assessment Tool being used in Kingston and Frontenac is the Service Prioritization Decision Assistance Tool (SPDAT). For more detail, see Schedule B: The Assessment Tools.

External comparable services refers to case management or Assertive Community Treatment services delivered by an agency, outside of the Housing & Homelessness Services System, that has a mandate that includes finding housing for their client and supporting them in housing. Examples of this include, but are not limited to: Assertive Community Treatment; Community High Intensity Treatment Team; and Extended Care & Maintenance.

Homeless Individuals and Families Information System (HIFIS) refers to an electronic database used to track clients of the Housing & Homelessness Services System as well as their service interactions within the system.

Initial Determination of Needs refers to Service Standard Gen-08: Initial Determination of Needs.

Mutual expectations refers to Service Standard Gen-09: Mutual Expectations Agreements.

Prioritization for Housing-Based Case Management refers to Service Standard HFRRH-02: Prioritization for Housing-Based Case Management.

The **Priority List** is a list of clients who have completed Assessment for Housing-Based Case Management and are awaiting assignment to a housing-based case manager. For more detail, see Service Standard HFRRH-02: Prioritization for Housing-Based Case Management.

The **Service Prioritization Decision Assistance Tool (SPDAT)** refers to an Assessment Tool created by OrgCode Consulting, Inc. which includes different versions for single adults, families, and youth. Currently, the SPDAT is the Assessment Tool being used in Kingston and Frontenac.

Team Leaders refers to those staff responsible for supervising Assessment Workers.

HFRRH-01 Schedule B: The Assessment Tools

The Assessment Tools selected by the Service Manager for use in the City of Kingston and the County of Frontenac are the Service Prioritization Decision Assistance Tool (SPDAT) series of products. Collectively, these products are referred to as "the Assessment Tools" or "the SPDAT."

This series includes different versions for different client groups, including tools for single adults, families, and youth. Service Providers will use the appropriate tool for the client or client group requiring an Assessment for Housing-Based Case Management as follows:

- For single adults and childless couples, 25 years of age and older, including parents without custody of their children, the Service Prioritization Decision Assistance Tool (SPDAT) Version 4 will be used.

- For families, defined as one or more parents accompanied by one or more dependent children, the Family Service Prioritization Decision Assistance Tool (F-SPDAT) Version 2 will be used.

- For youth, defined as being between the ages of 16 and 24 inclusive, the Youth Service Prioritization Decision Assistance Tool (Y-SPDAT) Version 1 will be used.

Should the SPDAT series of products be updated in the future, the Service Manager will update and re-issue this Schedule.

HFRRH-01 Schedule C: The Assessment Team

The Assessment Team is responsible for completing all Assessments for Housing-Based Case Management within the Housing & Homelessness Services System. All assessments are completed by a small, designated group of individuals, referred to as Assessment Workers, to promote consistency amongst assessors.

The Assessment Team comprises designated individuals from each Housing First/Rapid Re-Housing Team, as identified in Service Agreements between the Service Provider and the Service Manager. There is specialization for youth and those in rural areas.

HFRRH-01 Schedule D: The Assessment Process

Receiving a Transfer

1. The Assessment Team receives a transfer following the completion of the Initial Determination of Needs.
2. At any time before, during, or after the assessment, should an Assessment Worker learn that the client is receiving external comparable services, the staff will refer to HFRRH-01 Exception: Client Receiving External Comparable Services and proceed per this Service Standard.

Setting up an Appointment with Client

3. The Assessment Worker then makes an appointment with the client to conduct the Assessment for Housing-Based Case Management for a time and place most comfortable to the client. This appointment must be set for a date and time no later than ten (10) business days after the client's transfer to Assessment for Housing-Based Case Management.
   a. If the client cannot be reached, refer to HFRRH-01 Exception: Client Unavailable for Assessment.
   b. If there are multiple clients awaiting assessment and the Assessment Team is unable to serve all of them within the target time frame, clients will receive an Assessment for Housing-Based Case Management in chronological order.

Informed Consent to Proceed

4. At the appointment, the Assessment Worker communicates with the client the mutual expectations regarding Assessment for Housing-Based Case Management and Housing-Based Case Management (see Service Standard Gen-09: Mutual Expectations Agreements).
5. The Assessment Worker then obtains the client's agreement to the mutual expectations, in writing, prior to proceeding with the Assessment for Housing-Based Case Management.
   a. If the mutual expectations are not agreed to, Assessment for Housing-Based Case Management is not completed, and this outcome is documented.
   b. The Assessment Worker is responsible for assertively engaging with clients who do not agree, in order to understand the client's reason(s) for refusal and working to address the client's concerns in order to ensure that the client is permanently housed as quickly as possible.

Assessment with Client

6. The Assessment Worker uses the Assessment Tool in accordance with the requirements published by the author(s) of the Assessment Tool.
   a. Particular attention is paid to the client's history of homelessness. Each episode of homelessness is documented, including the start date and end date, and type of homelessness (i.e. camping, emergency sheltered), to the fullest extent possible.
   b. If the assessment cannot be completed in one session, refer to HFRRH-01 Exception: Assessment over Multiple Sessions.

Informing Client of Next Steps

7. The Assessment Worker obtains the client's permission to consult with other service providers that the client is currently engaged with in order to validate the client's responses.
8. The Assessment Worker provides the client with information about the next steps, including fact-checking and Prioritization for Housing-Based Case Management.

Validation of Assessment

9. The Assessment Worker contacts other service providers that the client is currently engaged with in order to validate the client's responses. The Assessment Team initiates this step no later than two (2) business days after the appointment with the client.

Scoring

10. The Assessment Worker compiles the information provided by the client as well as the information provided by other service providers and determines the client's score. This is documented along with all supporting documentation.

Informing Client of Result of Assessment

11. The Assessment Worker informs the client of the result of his or her Assessment for Housing-Based Case Management, and communicates the next steps in the process of Prioritization for Housing-Based Case Management.

Transfer Out of Assessment

12. As described in HFRRH-01 Schedule E: Results of the Assessment, the Assessment Worker either:
    a. determines the client to be eligible for Housing First or Rapid Re-Housing and transfers the client to Prioritization for Housing-Based Case Management by placing the client on the Priority List, or,
    b. determines the client to be ineligible for Housing First and Rapid Re-Housing and transfers the client back to the staff that initiated the transfer from Initial Determination of Needs.

HFRRH-01 Schedule E: Results of the Assessment

Based on the result of the Assessment for Housing-Based Case Management, the client's eligibility for other programs and services is determined. Based on their score, they are determined to be low Acuity, medium Acuity, or high Acuity as described in the chart below.

	SPDAT	F-SPDAT	Y-SPDAT
Low Acuity	0-19	0-26	0-19
Moderate Acuity	20-34	27-53	20-34
High Acuity	35-60	54-80	35-60

Low Acuity

Clients with Low Acuity are ineligible for the Housing First/Rapid Re-Housing Program and are transferred back to the staff that initiated the transfer from Initial Determination of Needs via a warm transfer.

Moderate Acuity

Clients with Moderate Acuity are eligible for Rapid Re-Housing and are placed on the Priority List and transferred to Prioritization for Housing-Based Case Management.

High Acuity

Clients with High Acuity are eligible for Housing First and are placed on the Priority List and transferred to Prioritization for Housing-Based Case Management.

HFRRH-01 Schedule F: Documentation in HIFIS

The Assessment Team receives a transfer subsequent to the Initial Determination of Needs. This is recorded in HIFIS in the following way:

- For youth, by a client being added to the Waiting List "Assessment Team – Youth" with the status "Awaiting Action." This is reached from the Front Desk Menu → Waiting Lists → Assessment Team – Youth.
- For adults, by a client being added to the Waiting List "Assessment Team – Adult" with the status "Awaiting Action." This is reached from the Front Desk Menu → Waiting Lists → Assessment Team – Adult.

The Assessment Team reviews this Waiting List at least once per 24 hours to identify new clients that have been transferred from Initial Determination of Needs to Assessment for Housing-Based Case Management.

The Assessment Team is responsible for ensuring that the following information is recorded into HIFIS in the manner specified, within 24 hours of the event occurring:

- If the HFRRH-1 Exception: Client Receiving External Comparable Services is triggered, the following update is made:
  - A survey is completed entitled "HFRRH-01 Form A: Request to Provide Assessment for Housing-Based Case Management to Client Receiving External Comparable Services." This is reached from Client File → Client Management → Surveys → Complete New Survey.
- If the client is determined to be ineligible for Housing First/Rapid Re-Housing as a result of the procedures described in HFRRH-1 Exception: Client Receiving External Comparable Services the following update is made:
  - The client's status on the Waiting List is updated to "SPDAT – Ineligible for HF/RRH" and an End Date is added reflecting the date of ineligibility determination. This is reached from the Client File → Client Management → Waiting Lists.
- Once an appointment is booked with the client, the following updates are made:
  - The client's status on the Waiting List is updated to "SPDAT – Appointment Booked." This is reached from the Client File → Client Management → Waiting Lists.
- If the HFRRH-01 Exception: Client Unavailable for Assessment is triggered, the following update is made:
  - The client's status on the Waiting List is updated to "Client – Unavailable for Assessment." This is reached from the Client File → Client Management → Waiting Lists. The End Date remains blank to reflect that the Assessment for Housing-Based Case Management has not yet been completed.
- If the client refuses consent, the following update is made:
  - The client's status on the Waiting List is updated to "Client – Declined Services." This is reached from the Client File → Client Management → Waiting Lists. The End Date remains blank to reflect that the Assessment for Housing-Based Case Management has not yet been completed.
- Once an appointment is completed, the following updates are made:
  - The client's status on the Waiting List is updated to "SPDAT – Validating." This is reached from the Client File → Client Management → Waiting Lists.

- Once the Assessment Worker is satisfied that all supporting document has been collected and compiled, the following update is made:
  - The client's Assessment for Housing-Based Case Management is recorded. This is reached from the Client File → SPDAT. The Program is "Assessment for Housing-Based Case Management." The Assessment Worker should enter a summary of both the client's responses and the data collected from service providers for each component.
  - The client's Housing History is updated to ensure that the client's complete history of homelessness is recorded in HIFIS. This is reached from the Client File → Client Information → Housing History.
  - The client's Contributing Factors are updated to reflect the client's barriers and needs through the Assessment for Housing-Based Case Management. This is reached from the Client File → Client Information → Various Factors → Contributing Factors. In general, any component in which the client is scoring a 2 or higher should be recorded as a Contributing Factor.
- If the client is ineligible for Housing-Based Case Management, the following update is made:
  - The client's status on the Waiting List is updated to "SPDAT – Ineligible for HF/RRH" and an End Date is added reflecting the date of ineligibility determination. This is reached from the Client File → Client Management → Waiting Lists.
- If the client is eligible for Housing-Based Case Management, the following updates are made:
  - The client's status on the Assessment Team Waiting List is updated to "SPDAT – Assessment complete, transferred to Priority List" and an End Date is added reflecting the date of ineligibility determination. This is reached from the Client File → Client Management → Waiting Lists.
  - The client is added to the Priority List Waiting List (youth or adult) with the status of "Awaiting Action." This is reached from the Client File → Client Management → Waiting Lists.

HFRRH-01 Schedule G: Accountability

The following data points will be monitored:

Data point	Purpose	2016 Target	Long-Term Goal
The number (#) of clients transferred to Assessment for Housing-Based Case Management	To understand the needed level of service for Assessment for Housing-Based Case Management	n/a	n/a
The number (#) and percentage (%) of eligible clients transferred for which Assessment for Housing-Based Case Management is completed	To ensure that all eligible clients are engaged by Assessment Team so that no clients are "slipping through the cracks"	85%	100%
The number (#) and percentage (%) of clients who score Low Acuity, Moderate Acuity, and High Acuity	To understand the needed level of service for the Housing First/Rapid Re-Housing Program	n/a	n/a
The average, median, and maximum length of time between transfer to Assessment for Housing-Based Case Management and completion of the Assessment for Housing-Based Case Management	To ensure that Assessment for Housing-Based Case Management is occurring in a timely fashion	Less than 10 business days	Less than 10 business days
The number (#) and percentage (%) of clients triggering Exception: Client Unavailable for Assessment, and the outcomes for these exceptions	To monitor fidelity to this Service Standard, optimize communication to clients by front line workers on the benefits of the program and next steps and seek ways to better serve clients	n/a	n/a
The number (#) and percentage (%) of clients triggering Exception: Assessment over Multiple Sessions, and the outcomes for these exceptions	To monitor fidelity to this Service Standard and seek ways to better serve clients such as assertive engagement and communications on the benefits of the program	n/a	n/a
The number (#) and percentage (%) of clients triggering Exception: Client Receiving Comparable External Services, and the outcomes for these exceptions	To monitor fidelity to this Service Standard and seek ways to better serve clients, and to gather data that can be used to build partnerships with external agencies	n/a	n/a

HFRRH-01 Form A: Determination of Need and Eligibility for Housing-Based Case Management for Clients Receiving External Comparable Services

This form is to be completed by the Assessment Team when a client is transferred to Assessment for Housing-Based Case Management and the Assessment Worker determines that the client is receiving external comparable services.

Client Name	Staff Name	Date
_____	_____	_____

Part 1: Determination of Need

External Service Provider	Contact Person	Phone
		_____
_____	_____	Email _____

What is the nature of services and supports related to housing acquisition and stability currently provided by the external service provider?

_____
_____
_____
_____
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What is the external service provider's current support plan? How do they envision Housing-Based Case Management services complementing their support services?

_____
_____
_____
_____
_____
_____
_____

Describe the external service provider's successes and challenges in assisting the client household find or maintain housing in the past three (3) years.

Successes	Challenges
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

How would the external service provider ensure that there is effective communication between the teams and that both teams understand their roles?

_____
_____
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What is the plan for the external service provider in remaining engaged with the client household, maintaining current and appropriate levels of services and supports, if the client was also served through the Housing First/Rapid Re-Housing Program?

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How would the client household achieve better outcomes if served through the Housing First/Rapid Re-Housing Program while receiving supports from the external service provider?

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Part 2: Determination of Eligibility for Housing-Based Case Management

A client is eligible if all of the following are true:

- ☐ Housing First/Rapid Re-Housing would not duplicate services provided by the external service provider
- ☐ Client is not seeking partial Housing First/Rapid Re-Housing services (i.e., housing only, rent supplements only, case management only)
- ☐ Client needs specialized, time limited help with immediate housing-related needs
- ☐ Improved housing outcomes are very likely with Housing First/Rapid Re-Housing housing-based case management services added to support agency ongoing services
- ☐ A service agreement is developed between external service provider and Housing First/Rapid Re-Housing service provider, stipulating:
    - ☐ External service provider will not discontinue or significantly reduce services currently provided to clients
    - ☐ Regular case conferences will be held by external service provider with input provided by HF/RRH staff and service plan updates provided to Housing First/Rapid Re-Housing staff
    - ☐ Housing First/Rapid Re-Housing services limited to 3-6 months
    - ☐ Housing First/Rapid Re-Housing services exclusively focused on immediate housing stabilization needs

Part 3: Administration
Decision made by **Prioritization Team**:

Name	Signature	Date	Result
_____	_____	_____	☐ Assessment ☐ No Assessment

Notes