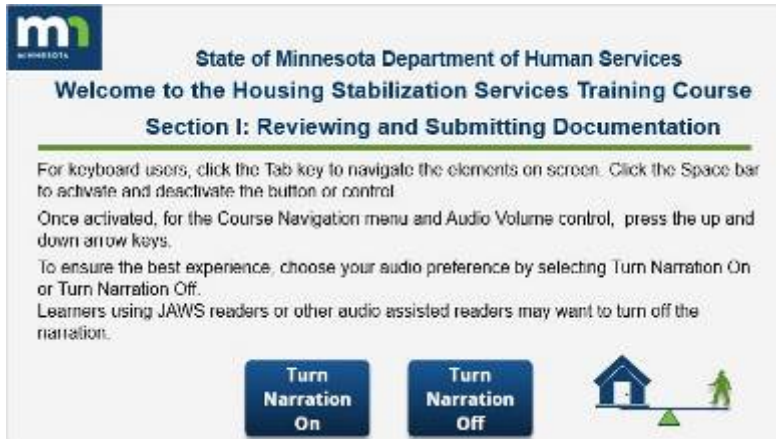


Introduction_to_Planning

1. Section 1 Overview

1.1 Welcome



Notes:

Welcome to the Housing Stabilization Services Training Course.
Section 1: Reviewing and Submitting Documentation.

For keyboard users, click the Tab key to navigate the elements on screen. Click the Space bar to activate and deactivate the button or control.

Once activated, for the Course Navigation menu and Audio Volume control, press the up and down arrow keys.

To ensure the best experience, choose your audio preference by selecting Turn Narration On or Turn Narration Off.

Learners using JAWS readers or other audio assisted readers may want to turn off the narration.

1.2 Narration Off

Narration Off Instructions

You have turned narration off. To turn the narration on use the Course Navigation menu to return to the Welcome screen and select Turn Narration On.

You can also use the Course Navigation menu to return to any slide you have already visited in the course.

At the bottom of the screen is a pause/ play and rewind buttons that do not function with narration off

Many of the screens contain buttons that popup windows. If you activate a button and the JAWS reader or focus does not move to a new item, click the Tab key to access the pop up window

Popup button

Notes:

You have turned narration off. To turn the narration on use the Course Navigation menu to return to the Welcome screen and select Turn Narration On.

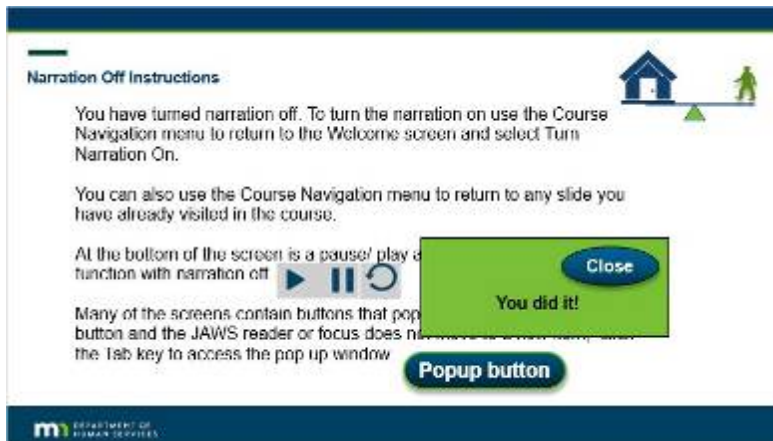
You can also use the Course Navigation menu to return to any slide you have already visited in the course.

At the bottom of the screen is a pause/play and rewind buttons that do not function with narration off.

Many of the screens contain buttons that popup windows.

If you activate a button and the JAWS reader or focus does not move to a new item, click the Tab key to access the pop up window.

Popup (Slide Layer)



Narration Off Instructions

You have turned narration off. To turn the narration on use the Course Navigation menu to return to the Welcome screen and select Turn Narration On.

You can also use the Course Navigation menu to return to any slide you have already visited in the course.

At the bottom of the screen is a pause/ play function with narration off.

Many of the screens contain buttons that pop up a window when the Tab key is pressed. The JAWS reader or focus does not see the Tab key to access the pop up window.

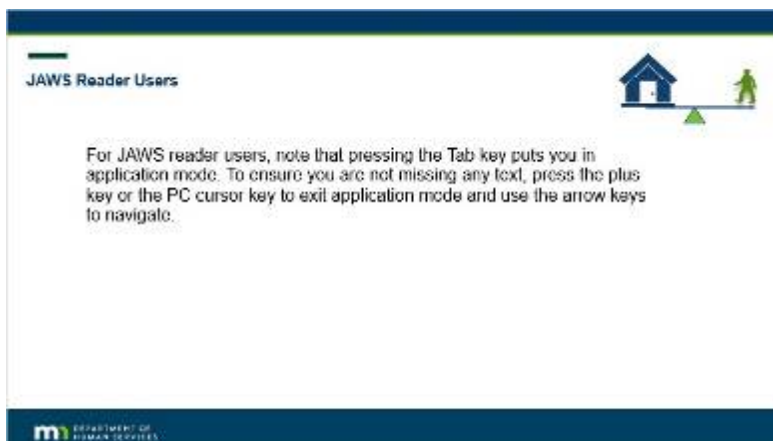
Close

You did it!

Popup button

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1.3 JAWS Reader Users



JAWS Reader Users

For JAWS reader users, note that pressing the Tab key puts you in application mode. To ensure you are not missing any text, press the plus key or the PC cursor key to exit application mode and use the arrow keys to navigate.

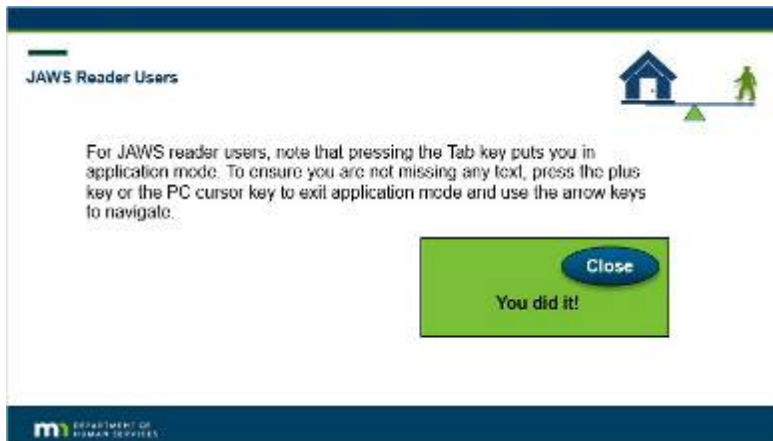
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Notes:

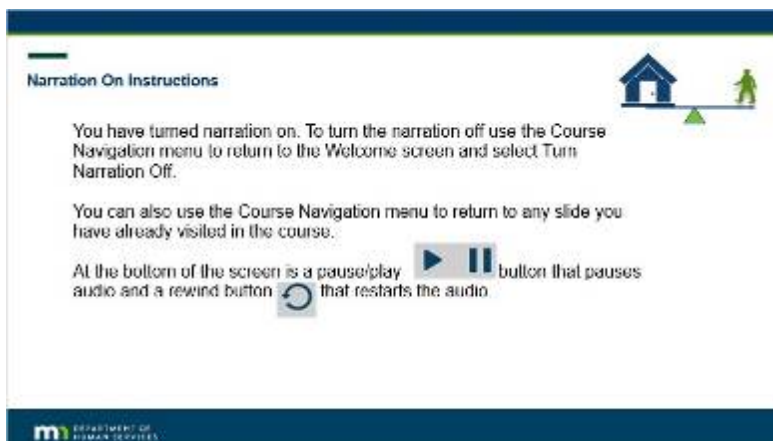
For JAWS reader users, note that pressing the Tab key puts you in application mode.

To ensure you are not missing any text, press the plus key or the PC cursor key to exit application mode and use the arrow keys to navigate.

Popup (Slide Layer)



1.4 Narration On



Notes:

You have turned narration on.

To turn the narration off use the Course Navigation menu to return to the Welcome screen and select Turn Narration Off.

You can also use the Course Navigation menu to return to any slide you have already visited in the course.

At the bottom of the screen is a pause/play button that pauses audio and a rewind button that restarts the audio.

2. Introduction to Planning

2.1 Introduction

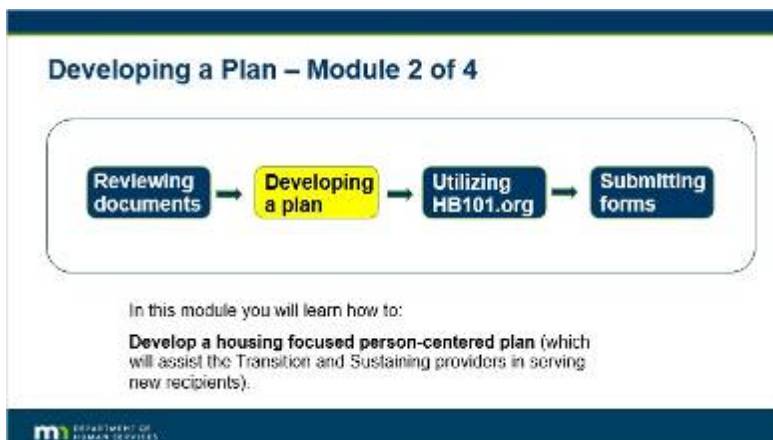


Notes:

Welcome to Housing Stabilization Services Section 1: Reviewing and Submitting Documentation: Module Two: Introduction to Planning.

Estimated Completion Time: 35 minutes

2.2 Developing a Plan – Module 2 of 4



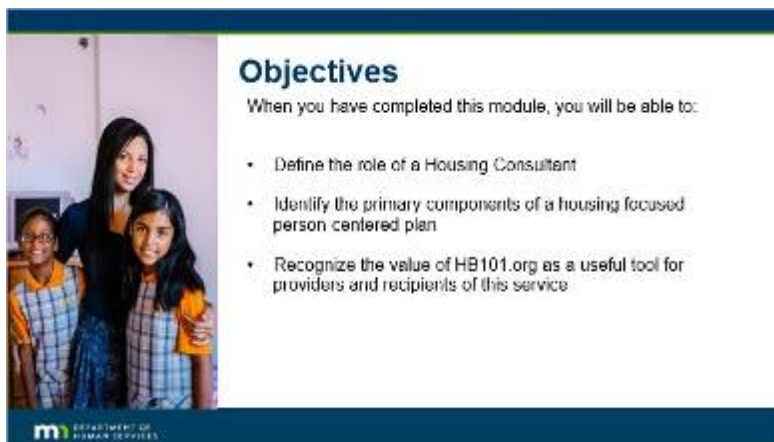
Notes:

Developing a Plan - Module 2 of 4

In this module you will learn how to:

Develop a housing focused person-centered plan (which will assist the Transition and Sustaining providers in serving new recipients).

2.3 Objectives



Objectives

When you have completed this module, you will be able to:

- Define the role of a Housing Consultant
- Identify the primary components of a housing focused person centered plan
- Recognize the value of HB101.org as a useful tool for providers and recipients of this service

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Notes:

Objectives

- When you have completed this module you will be able to:
Define the role of a Housing Consultant
- Identify the primary components of a housing focused person-centered plan

Recognize the value of HB101.org as a useful tool for providers and recipients of this service

2.4 Housing Consultant Responsibilities

Housing Consultant Responsibilities

In the previous module, Reviewing Eligibility, you learned how to determine if a person has all of the eligibility documents and assessments outcomes they will need for housing stabilization services.

Once these eligibility documents and assessments outcomes have been reviewed, a Housing Consultant can then assist in creating a housing focused person-centered plan for people.



Housing Focused
Person-Centered
Plan



Notes:

Housing Consultant Responsibilities

In the previous module, Reviewing Eligibility, you learned how to determine if a person has all of the eligibility documents and assessments outcomes they will need for housing stabilization services.


Once these eligibility documents and assessments outcomes have been reviewed, a Housing Consultant can then assist in creating a housing focused person-centered plan for people.


2.5 Housing Consultant vs. Case Manager

Housing Consultant vs. Case Manager

A Housing Consultant can assist someone in creating a housing focused person-centered plan if they do not currently have a waiver case manager or targeted case manager.

If a person has waiver or targeted case management, they need to be referred back to them to complete a person-centered plan.





Notes:

Housing Consultant vs. Case Manager

A Housing Consultant can assist someone in creating a housing focused person-centered plan if they do not currently have a waiver case manager or targeted case manager.
If a person has waiver or targeted case management, they need to be referred back to them to complete a person-centered plan.

2.6 Housing Consultation Services

Housing Consultation Services

Housing Consultation services help the person develop a person-centered plan and assist them to make an informed choice about who they want to provide their Housing Transition/Sustaining services.

A Housing Consultant will work with a person to review eligibility documentation, develop a housing focused person-centered plan, and provide them with options for selecting a Transition or Sustaining provider that meets their housing needs.





Notes:

Housing Consultation Services

Housing Consultation services help the person develop a person-centered plan and assist them to make an informed choice about who they want to provide their Housing Transition/Sustaining services.
A Housing Consultant will work with a person to review eligibility documentation, develop a housing focused person-centered plan, and provide them with options for selecting a Transition or Sustaining provider that meets their housing needs.

2.7 Home and Community Based Services: Conflict of Interest

Home and Community Based Services: Conflict of Interest

The conflict of interest specification is a Home and Community Based Settings (HCBS) requirement.

The same provider (agency) cannot perform both the assessment and plan of care and provide Housing Transition and Sustaining services **for the same person**.

If you work with Person A to provide housing consultation services, they must receive Transition or Sustaining services from a different services provider. See example.

Housing Consultation Services	Transition and Sustaining Services
	



Notes:

Home and Community Based Services: Conflict of Interest

The conflict of interest specification is a Home and Community Based Settings (HCBS) requirement.

The same provider (agency) cannot perform *both* the assessment and plan of care *and* provide Housing Transition and Sustaining services **for the same person**.

If you work with Person A to provide housing consultation services, they must receive Transition or Sustaining services from a different services provider. See example.

2.8 Home and Community Based Services: Conflict of Interest

Home and Community Based Services: Conflict of Interest

The conflict of interest specification exists to ensure the independence of persons performing evaluations, assessments, and plans of care.

If you work with Person D to provide Transition or Sustaining services the client must have received housing consultation services from a different services provider. See example.

Housing Consultation Services	Transition and Sustaining Services
<p>You as a Housing Consultant for Person B.</p>	<p>You as a Transition and Sustaining provider for Person B.</p>

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Notes:


Home and Community Based Services: Conflict of Interest

The conflict of interest specification exists to ensure the independence of persons performing evaluations, assessments, and plans of care.

If you work with Person B to provide Transition or Sustaining services the client must have received housing consultation services from a different services provider. See example.


2.9 Knowledge Check

Knowledge Check
True or False. Select the correct answer.



If a person has a HCBS waiver case manager or targeted case manager they should be referred to them to complete their person-centered plan.

☐ True ☐ False



Notes:


Knowledge Check

True or False. Select the correct answer.

If a person has a HCBS waiver case manager or targeted case manager they should be referred to them to complete their person-centered plan.

Correct (Slide Layer)

Know
True or False



✓ Correct!


If a person has a HCBS waiver case manager or targeted case manager they should be referred to them to complete their person-centered plan.

Close

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Incorrect (Slide Layer)

Know
True or False



✗ Incorrect.

If a person has a HCBS waiver case manager or targeted case manager they should be referred to them to complete their person-centered plan.

Close

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2.10 Knowledge Check

Knowledge Check

True or False. Select the correct answer.



A Housing Consultant can assist in reviewing eligibility documentation and developing a housing focused person-centered plan as well as provide Transition or Sustaining services to the same recipient.

True False

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Notes:

Knowledge Check

True or False. *Select the correct answer.*

A Housing Consultant can assist in reviewing eligibility documentation and developing a housing focused person-centered plan as well as provide Transition or Sustaining services to the same recipient.

Correct (Slide Layer)



Incorrect (Slide Layer)



3. Housing Focused Person Centered Service Plan

3.1 Housing Focused Person-Centered Plan

Housing Focused Person-Centered Plan

Person-centered planning assists a person in developing a plan that focuses on a person's wants and needs and helps people access services and supports they need.

Click the button to access the DHS person-centered training course

[DHS person-centered training course](#)

Everyone receiving housing stabilization services will be required to have a person-centered plan. The person-centered planning process must:

- Be driven by the individual,
- Include the person's strengths, interests, wants as well as what supports they need, and,
- Help the person make an informed choice about their housing stabilization service provider

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Notes:

Housing Focused Person-Centered Plan



Person-centered planning assists a person in developing a plan that focuses on a person's wants and needs and helps people access services and supports they need.

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Everyone receiving housing stabilization services will be required to have a person-centered plan. The person-centered planning process must:
Be driven by the individual,
Include the person's strengths, interests, wants as well as what supports they need, and,
Help the person make an informed choice about their housing stabilization service provider

3.2 Housing Focused Person-Centered Plan

Housing Focused Person-Centered Plan

Click the button below to view a pdf example of a housing focused person-centered plan



Housing Focused Person-Centered Plan

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Notes:

Housing Focused Person-Centered Plan

Click the button below to view a pdf example of a housing focused person-centered plan.

3.3 Developing a Housing Focused Person-Centered Plan

Developing a Housing Focused Person-Centered Plan

As a Housing Consultant, you will complete a housing focused person-centered plan with the person you are supporting.

The Housing Consultant monitors and updates this plan annually or more frequently if the person requests a plan change, experiences a change in circumstance or wants to change Housing Stabilization providers.

The housing focused person-centered plan helps you understand a person's strengths, needs and wants, and how those relate to housing options available.



Housing Focused Person-Centered Plan

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Notes:

Developing a Housing Focused Person-Centered Plan

As a Housing Consultant, you will complete a housing focused person-centered plan with the person you are supporting. The Housing Consultant monitors and updates this plan annually or more frequently if the person requests a plan change, experiences a change in circumstance or wants to change Housing Stabilization providers. The housing focused person-centered plan helps you understand a person's strengths, needs and wants, and how those

relate to housing options available.

3.4 Housing Focused Person-Centered Plan Requirements



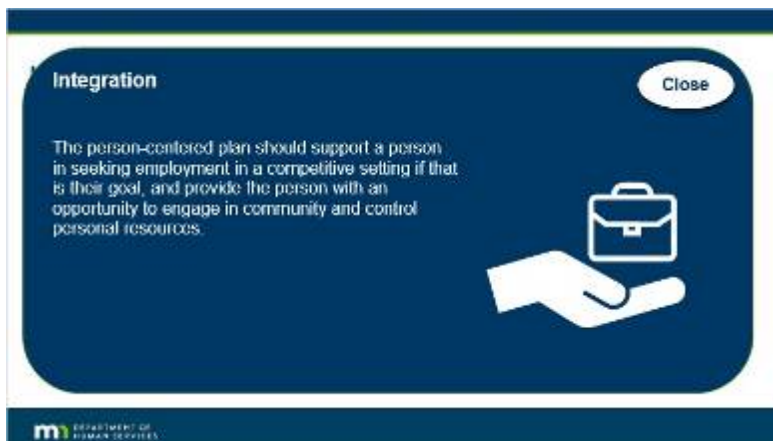
Notes:

Housing Focused Person-Centered Plan Requirements

There are four main requirements that make up a housing focused person-centered plan.

Click on the buttons to learn more about each type of requirement. Once you click each of the four buttons, read their content, and close the windows you can click Next to continue.

Integration (Slide Layer)



Wellbeing (Slide Layer)

Wellbeing

The person-centered plan should aim to improve the wellbeing of the person.

The plan supports a person's health and welfare and is designed to mitigate risk factors.



Close

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DrivenbyPerson (Slide Layer)

Driven by Person

A person-centered plan is *driven* by their personally-defined interests and goals.

The language in each plan should be plain and reflect cultural considerations, as well as these interests and goals.



Close

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Choice (Slide Layer)

Choice

A person is provided first and foremost with choice.

They get to *choose* their service delivery and provider, as well as their setting/living arrangements.



Close

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3.5 Knowledge Check

Knowledge Check

True or False. Select the correct answer.



Everyone receiving housing stabilization services is required to have a person-centered plan.

True

False



Notes:

Knowledge Check


True or False. Select the correct answer.

Everyone receiving housing stabilization services is required to have a person-centered plan.

Incorrect (Slide Layer)

Know

True or




✖ Incorrect.

Everyone receiving housing stabilization services is required to have a person-centered plan.

The type of person-centered plan may be different if they have a HCBS waiver case manager, targeted case manager or a Housing Consultant.

For example, Housing Consultants and targeted case managers will generate housing focused person centered plans, while HCBS waiver case managers will complete a Coordinated Services and Supports Plan.


Close



Correct (Slide Layer)

Know

True or False. Select the correct answer.



Correct!

Everyone receiving housing stabilization services is required to have a person-centered plan.

The type of person-centered plan may be different if they have a HCBS waiver case manager, targeted case manager or a Housing Consultant.

For example, Housing Consultants and targeted case managers will generate housing focused person centered plans, while HCBS waiver case managers will complete a Coordinated Services and Supports Plan.

Close

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3.6 Knowledge Check

Knowledge Check

True or False. Select the correct answer.



A person-centered plan is driven by the Housing Consultant's interests.

True False

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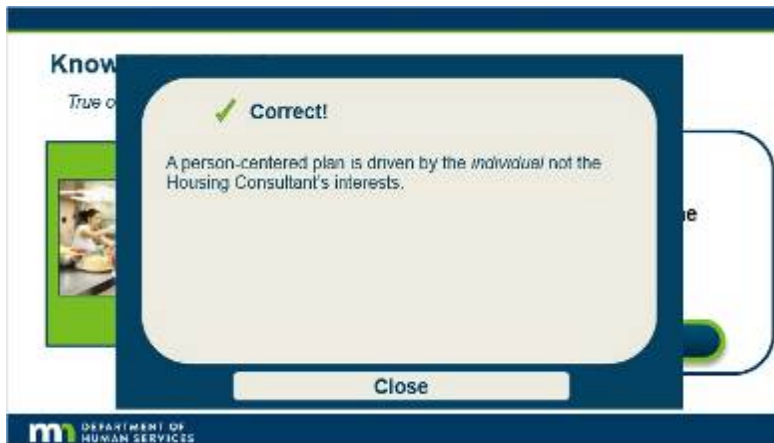
Notes:

Knowledge Check

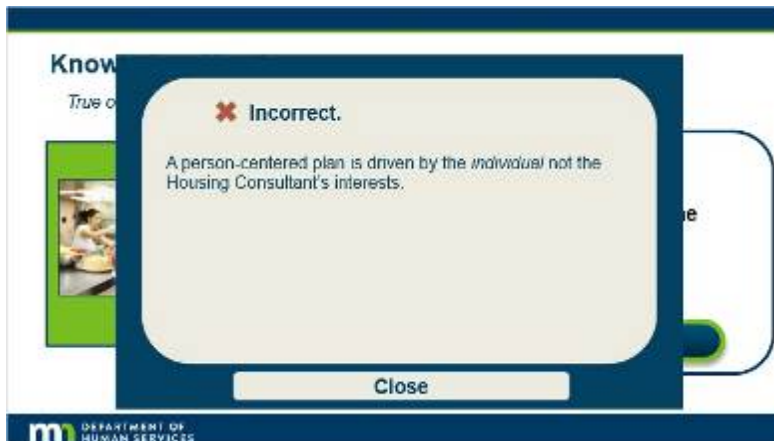
True or False. Select the correct answer.

A person centered plan is driven by the Housing Consultant's interests.

Correct (Slide Layer)

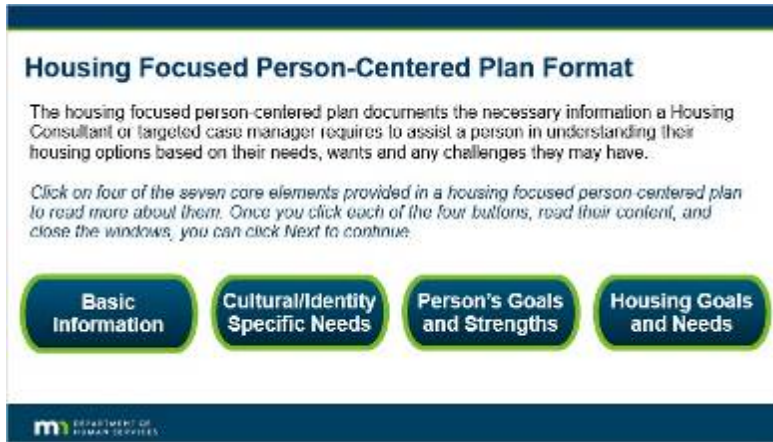


Incorrect (Slide Layer)



4. Housing Focused Person Centered Plan Format

4.1 Housing Focused Person-Centered Plan Format



Notes:

Housing Focused Person-Centered Plan Format

The housing focused person centered plan documents the necessary information a Housing Consultant or targeted case manager requires to assist a person in understanding their housing options based on their needs, wants and any challenges they may have.

Click on four of the seven core elements provided in a housing focused person centered plan to read more about them. Once you click each of the four buttons, read their content, and close the windows, you can click Next to continue.

Housing Services and support required (Slide Layer)

Housing Goals and Needs

This area comprises someone's housing goals and their needs in relation to these services. In the needs section, you will write:

- Their choice of provider
- Areas in need of housing, and,
- Support instructions

Important, you must write a person's assessed needs in the support instructions box. The areas of assessed need are communication, mobility, decision making and/or managing challenging behaviors.



Close

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Person's goals and strengths (Slide Layer)

Person's Goals and Strengths

- Desired housing situation (e.g., with a roommate vs. live alone, or 2nd floor, etc.).
- Preferred location, (e.g., near a park, school, or public transportation).
- Social capabilities, etc.



Close


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Cultural/Identity specific needs (Slide Layer)

Cultural/Identity Specific Needs

Understanding a person's:

- Culture
- Religion
- Ethnic background
- Sexual orientation or gender identity, and,
- How this background relates to their housing needs



Close

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Basic information (Slide Layer)

Basic Information Close

- Plan developer information
- Personal contact information
- Healthcare provider information
- Emergency contact information
- Alternative decision maker information
- Identifying what a person likes and doesn't like related to housing



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Housing Focused Person-Centered Plan

Person Information

Full Name	DOB	Gender	Referral Source
Address	City	State	Zip
Phone	Mobile	Home	Work
Emergency Contact	Relationship	Phone	Address

Emergency Contacts (If Known)

Name	Relationship	Phone	Address

4.2 Housing Focused Person-Centered Plan Format

Housing Focused Person-Centered Plan Format

Click on the final three of the seven core elements provided in a housing focused person-centered plan to read more about them.

Once you click each of the three buttons, read their content and close the windows, you can click Next to continue.

Non-housing related support referral **Risk Mitigation** **Signature**

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Notes:

Housing Focused Person-Centered Plan Format


Click on the final three of the seven core elements provided in a housing focused person centered plan to read more about them.

Once you click each of the three buttons, read their content and close the windows, you can click Next to continue.


Signature (Slide Layer)

Signature

A signature provides proof that the above elements are accurate, satisfactory, and approved by the person.



Close



Risk Mitigation (Slide Layer)


Risk Mitigation

Methods and strategies for the person to keep them in their home.

Some examples of risk mitigation include setting up auto-payments, walking through a lease with them so they clearly understand what is expected of them, expunging felonies, or assisting them with communication with the future or present landlord and neighbors.




Close




Non-Housing (Slide Layer)

Non-housing Related Support Referral

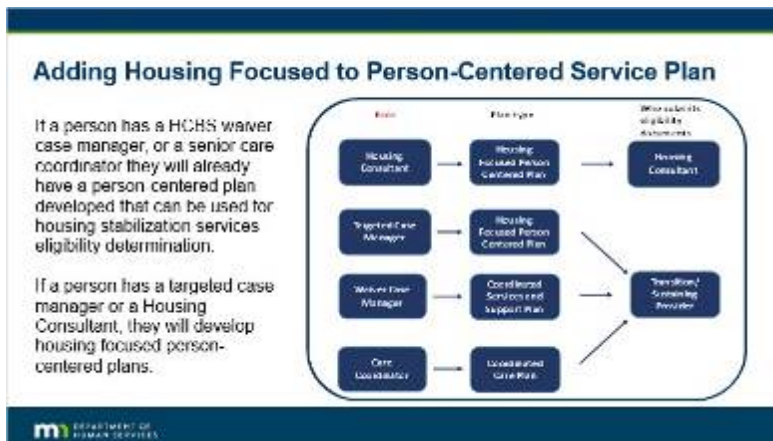
Locating an advocate/referral for the person (e.g., boss, co-worker, mentor, parole officer, religious leader, etc.).



Close



4.3 Adding Housing Focused to Person-Centered Service Plan



4.4 Knowledge Check

Knowledge Check

True or False. Select the correct answer.



Risk mitigation is a form of planning that increases the chances of keeping a person in their home.

True **False**

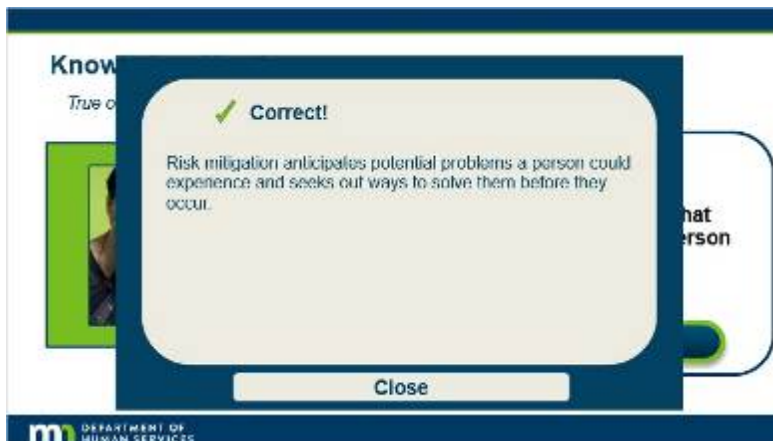
Notes:

Knowledge Check

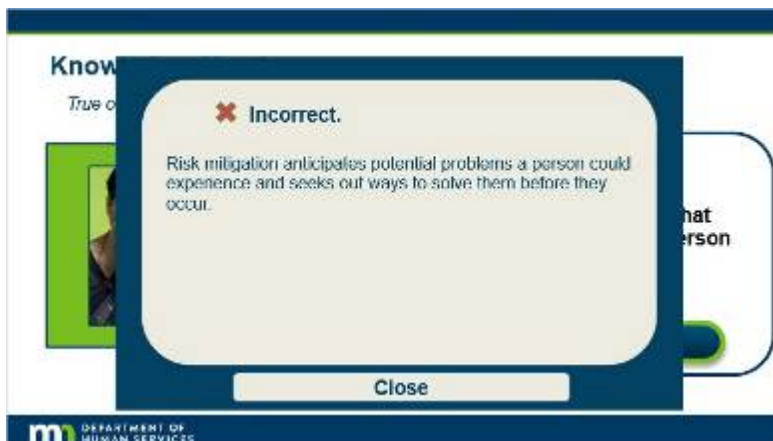
True or False. Select the correct answer.

Risk mitigation is a form of planning that increases the chances of keeping a person in their home.

Correct (Slide Layer)




Incorrect (Slide Layer)



4.5 Knowledge Check


Knowledge Check

True or False. Select the correct answer.



A housing focused person-centered plan guarantees that a person gets what they want in terms of their housing needs.

TrueFalse



Notes:

Knowledge Check


True or False. Select the correct answer.


A housing focused person-centered plan guarantees that a person gets what they want in terms of their housing needs.

Correct (Slide Layer)

Know

True o




 **Correct!**

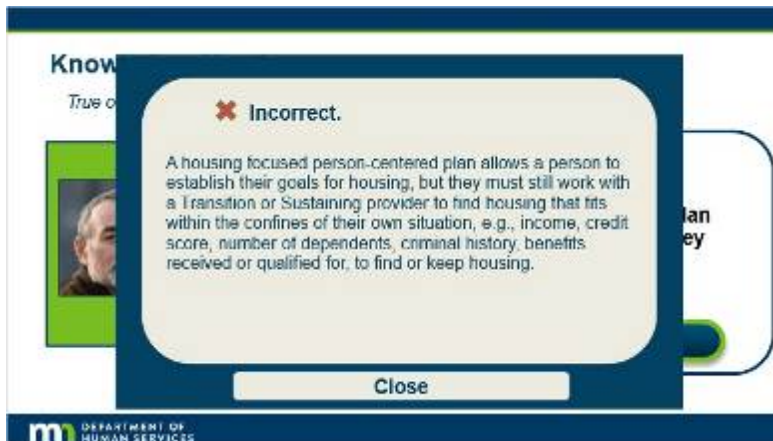
A housing focused person-centered plan allows a person to establish their goals for housing, but they must still work with a Transition or Sustaining provider to find housing that fits within the confines of their own situation, e.g., income, credit score, number of dependents, criminal history, benefits received or qualified for, to find or keep housing.

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Close

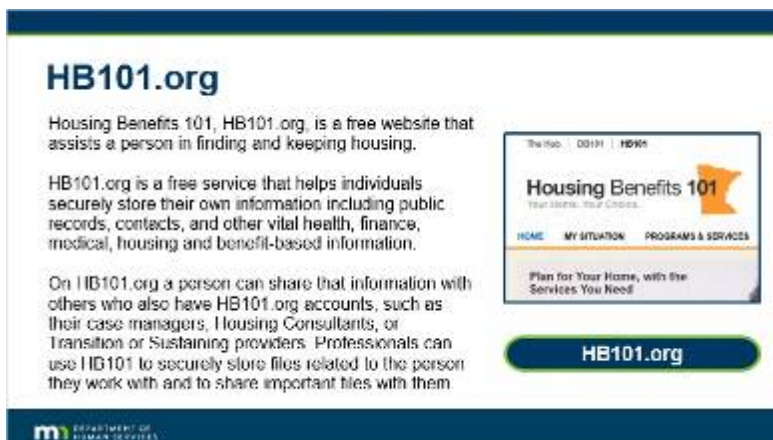


Incorrect (Slide Layer)



5. HB101.org

5.1 HB101.org



Notes:

HB101.org

Housing Benefits 101, HB101.org, is a free website that assists a person in finding and keeping housing.

HB101.org is a free service that helps individuals securely store their own information including public records, contacts, and other vital health, finance, medical, housing and benefit-based information.

On HB101.org a person can share that information with others who also have HB101.org accounts, such as their case managers, Housing Consultants, or Transition or Sustaining providers. Professionals can use HB101 to securely store files related to the person they work with and to share important files with them.

5.2 HB101.org – A Recommended Best Practice

HB101.org – A Recommended Best Practice

HB101 is a recommended best practice for storing housing information digitally for the person.

- As a Housing Consultant or Transition/Sustaining provider, you can create an account for yourself
- The person may already have an account or you may choose to create an account for them
- The person's account requires an email address so as the Housing Consultant, you may need to set up an email account for the person with an email provider (e.g., Gmail, Yahoo, etc.)
- Once you have both established accounts on HB101, you can partner with the person in walking through and adding information.

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Notes:

HB101.org - A Recommended Best Practice

- HB101 is a recommended best practice for storing housing information digitally for the person.
As a Housing Consultant or Transition/Sustaining provider, you can create an account for yourself.
- The person may already have an account or you may choose to create an account for them.
- The person's account requires an email address so as the Housing Consultant, you may need to set up an email account for the person with an email provider (e.g., Gmail, Yahoo, etc.).
Once you have both established accounts on HB101, you can partner with the person in walking through and adding information.

5.3 HB101.org Basics

HB101.org Basics

Click on each topic to learn the basics about HB101.org.

Once you click each of the three buttons, read their content and close the windows, you can click Next to continue.

The Hub | DB101 | HB101

Housing Benefits 101
Your Home. Your Choice.

HOME | MY SITUATION | PROGRAMS & SERVICES

Plan for Your Home, with the Services You Need

HB101 Vault

Planning Team

Risk Mitigation

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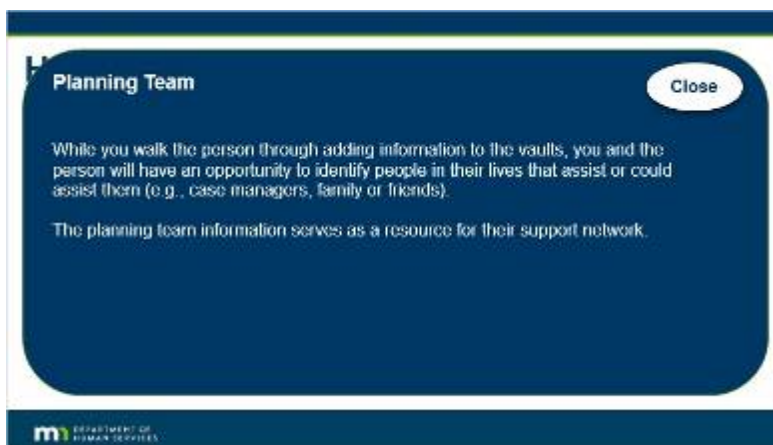
Notes:

HB101.org Basics

Click on each topic to learn the basics about HB101.org.

Once you click each of the three buttons, read their content and close the windows, you can click Next to continue.

Planning Team (Slide Layer)

A dark blue slide layer with a white title bar at the top. The title bar contains the text "Planning Team" on the left and a "Close" button on the right. The main content area is dark blue with white text. The text reads: "While you walk the person through adding information to the vaults, you and the person will have an opportunity to identify people in their lives that assist or could assist them (e.g., case managers, family or friends). The planning team information serves as a resource for their support network." At the bottom left, there is a logo for the "m" Department of Human Services.

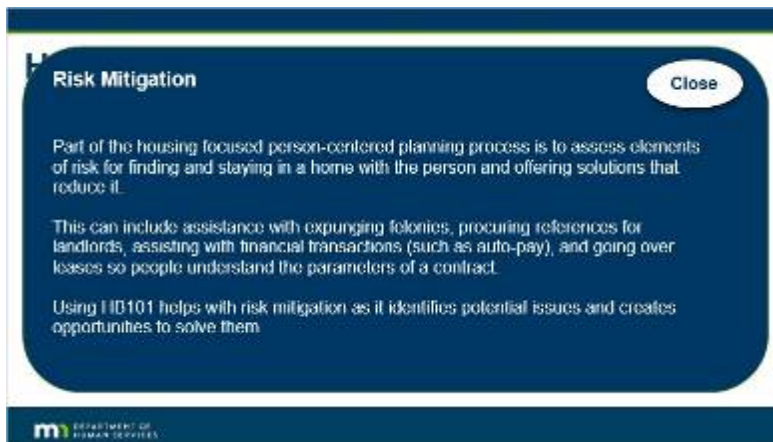
Planning Team Close

While you walk the person through adding information to the vaults, you and the person will have an opportunity to identify people in their lives that assist or could assist them (e.g., case managers, family or friends).

The planning team information serves as a resource for their support network.

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Risk Mitigation (Slide Layer)

A dark blue slide layer with a white title bar at the top. The title bar contains the text "Risk Mitigation" on the left and a "Close" button on the right. The main content area is dark blue with white text. The text reads: "Part of the housing focused person-centered planning process is to assess elements of risk for finding and staying in a home with the person and offering solutions that reduce it. This can include assistance with expunging felonies, procuring references for landlords, assisting with financial transactions (such as auto-pay), and going over leases so people understand the parameters of a contract. Using HB101 helps with risk mitigation as it identifies potential issues and creates opportunities to solve them." At the bottom left, there is a logo for the "m" Department of Human Services.

Risk Mitigation Close

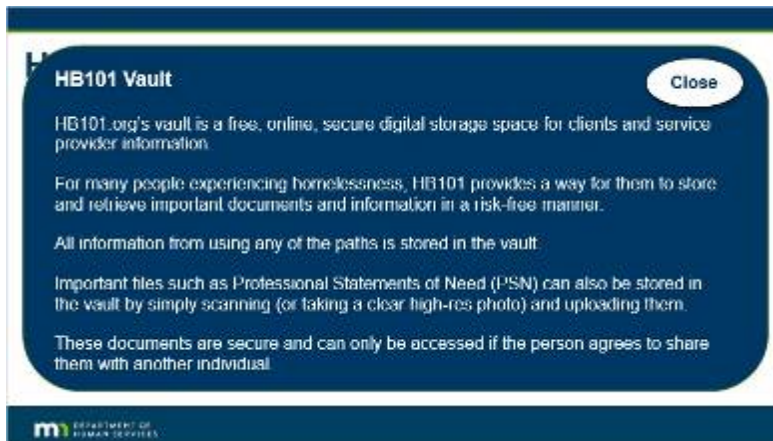
Part of the housing focused person-centered planning process is to assess elements of risk for finding and staying in a home with the person and offering solutions that reduce it.

This can include assistance with expunging felonies, procuring references for landlords, assisting with financial transactions (such as auto-pay), and going over leases so people understand the parameters of a contract.

Using HB101 helps with risk mitigation as it identifies potential issues and creates opportunities to solve them.

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HB101 Vault (Slide Layer)



HB101 Vault Close

HB101.org's vault is a free, online, secure digital storage space for clients and service provider information.

For many people experiencing homelessness, HB101 provides a way for them to store and retrieve important documents and information in a risk-free manner.

All information from using any of the paths is stored in the vault.

Important files such as Professional Statements of Need (PSN) can also be stored in the vault by simply scanning (or taking a clear high-res photo) and uploading them.

These documents are secure and can only be accessed if the person agrees to share them with another individual.

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5.4 HB101 Paths



HB101 Paths

HB101 has paths which help you and the person gather and store important information. The paths prompt you for information - for example "In what type of place do you want to live?" You will learn more about how to use these paths in a later module.

Click on each button to learn more about the information gathered and stored in that HB101 path. Once you click each of the six buttons, read their content and close the windows, you can click Next to continue.

I Get To Decide	Housing Budget	Housing Needs & Wants
My Day, My Life	Present Myself	Live with Someone

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Notes:

HB101 Paths

HB101 has paths which help you and the person gather and store important information. The paths prompt you for information - for example "In what type of place do you want to live?" You will learn more about how to use these paths in a later module.

Click on each button to learn more about the information gathered and stored in that HB101 path. Once you click each of the six buttons, read their content and close the windows, you can click Next to continue.

My Day My Life (Slide Layer)

My Day, My Life (What help do I need?)

Break down the person's schedule and consider what the person wants it to look like.

[My Day My Life Path](#)



Close

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Housing Budget (Slide Layer)

Housing Budget (Does the money add up?)

Research the housing finances available to your client.

[Housing Budget Path](#)



Close


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Housing Needs & Wants (Slide Layer)

Housing Needs & Wants (What do I want in a new place?)

Make a list of what the person must have, and what the person would like to have.

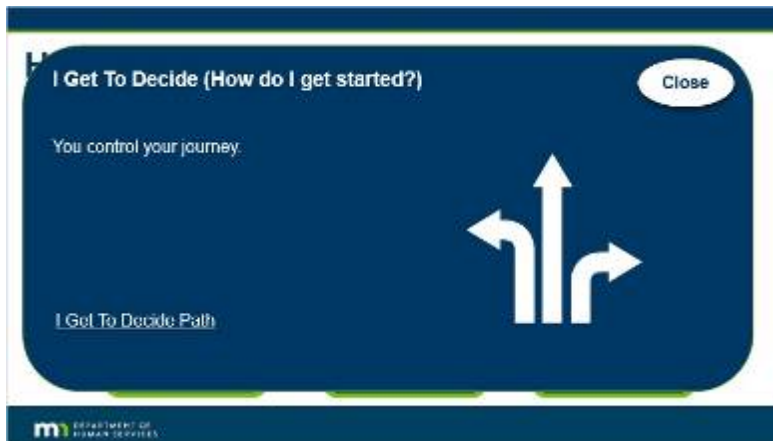
[Housing Needs & Wants Path](#)



Close

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I Get To Decide (Slide Layer)



Present Myself (Slide Layer)



Live with Someone (Slide Layer)





5.5 HB101.org – Example

HB101.org – Example

Carl is a person with a developmental disability who is living in corporate foster care in Redwood Falls, and wants to live independently. Before living in corporate foster care, Carl had issues managing his budget and often failed to pay rent on time. As a Transition Provider who is authorized by Carl via HB101 to view his records, you realize from the "Housing Budget" path that he receives monthly payments in the form of SSI. You and Carl work together to find a good place for him to live, and succeed, except the property manager is concerned that Carl won't be able to pay on time.

With Carl's permission, you set up automatic payments from his SSI deposits that transfer the amount of his monthly rent directly to the property manager. You call the property manager and tell him this is what you have done. This assures the property manager that he will not have to deal with late or absent payments. Carl is able to move into his new living situation.





Notes:


HB101.org - Example

Carl is a person with a developmental disability who is living in corporate foster care in Redwood Falls, and wants to live independently. Before living in corporate foster care, Carl had issues managing his budget and often failed to pay rent on time. As a Transition Provider who is authorized by Carl via HB101 to view his records, you realize from the "Housing Budget" path that he receives monthly payments in the form of SSI. You and Carl work together to find a good place for him to live, and succeed, except the property manager is concerned that Carl won't be able to pay on time.

With Carl's permission, you set up automatic payments from his SSI deposits that transfer the amount of his monthly rent directly to the property manager. You call the property manager and tell him this is what you have done. This assures the property manager that he will not have to deal with late or absent payments. Carl is able to move into his new living situation.


5.6 Knowledge Check

Knowledge Check
True or False. Select the correct answer.



HB101.org is a mandatory tool for all Housing Consultants and Transition/Sustaining Service providers.

True **False**



Notes:

Knowledge Check

True or False. Select the correct answer.

HB101.org is a mandatory tool for all Housing Consultants and Transition/Sustaining Service providers.

Correct (Slide Layer)

Know
True or



Correct!

HB101.org is a recommended tool available to all Housing Consultants and Transition/Sustaining providers at no cost.

Close



Incorrect (Slide Layer)



6. Best Practices Scenario 1

6.1 Scenario Best Practices



Notes:

Scenario Best Practices

In order to provide the most professional experience for someone always model respectful, empathic, and calm behavior which prepares and coaches them to speak with landlords, neighbors, and roommates.

Remember these three key elements when interacting with a potential recipient.

- 1) Be respectful
- 2) Demonstrate empathy

3) Remain calm

6.2 Best Practices Scenario 1


Best Practices Scenario 1


So far you have learned what Housing Consultation services are, the requirements for a housing focused person-centered plan (choice, driven by person, wellbeing, and integration), and a brief overview of the benefits of HB101.org.

Let's walk through the following scenario on introduction to planning.

Thomas walks into your office. He currently lives in Rochester doubled up on his brother's couch. You have covered the triage questions with Thomas.

He is over 18, on MA, and has proof of disability (SSDI award letter), proof of housing instability and an assessed need for services (Coordinated Entry assessment).





Notes:

Best Practices Scenario 1

So far you have learned what Housing Consultation services are, the requirements for a housing focused person-centered plan (choice, driven by person, wellbeing, and integration), and a brief overview of the benefits of HB101.org.

Let's walk through the following scenario on introduction to planning.

Thomas walks into your office. He currently lives in Rochester doubled up on his brother's couch. You have covered the triage questions with Thomas. He is over 18, on MA, and has proof of disability (SSDI award letter), proof of housing instability, and an assessed need for services (Coordinated Entry assessment).

6.3 Best Practices Scenario 1 – Part 1 of 8

Best Practices Scenario 1 – Part 1 of 8

Read the following dialogue.

"Well Thomas, your eligibility documents are in order. Let's take this opportunity to start working on your housing focused person centered plan. A housing focused person-centered plan is designed to be driven by you. These are your choices to make. How's that sound?"

"Sounds good. Thanks for letting me know."

"First off, I just need your basic information, such as personal contact, emergency contact, and healthcare information. You can either tell it to me or write it here."

"I'll write it in."

Thomas writes in his personal contact, emergency contact, healthcare provider, etc.

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Notes:

Read the following dialogue.

"Well Thomas, your eligibility documents are in order. Let's take this opportunity to start working on your housing focused person-centered plan. A housing focused person-centered plan is designed to be driven by you. These are your choices to make. How's that sound?"

"Sounds good. Thanks for letting me know."

"First off, I just need your basic information, such as personal contact, emergency contact, and healthcare information. You can either tell it to me or write it here."

"I'll write it in."

Thomas writes in his personal contact, emergency contact, healthcare provider, etc.

6.4 Best Practices Scenario 1 – Part 2 of 8

Best Practices Scenario 1 – Part 2 of 8

Read the following dialogue. Select the best responses.

"Okay, what are you looking for in the way of housing?"

"I want my own place to live. I'm currently living with my brother, but he won't have me for much longer and I don't really wanna go back to sleeping at shelters. I had a brain injury from working in the past but didn't do anything about it. I'm on SSDI because I had enough work credits. I'd also like a sober living home as I struggle with substance abuse. And I don't want any roommates either."

"Thanks for sharing that with me. We'll include this in your housing focused person-centered plan that you want your own place to live."

"Unfortunately, there's no guarantee you can get your own."

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Notes:

Read the following dialogue. Select the best response.

"Okay, what are you looking for in the way of housing?"

"I want my own place to live. I'm currently living with my brother, but he won't have me for much longer and I don't really wanna go back to sleeping at shelters. I had a brain injury from working in the past but didn't do anything about it. I'm on SSDI because I had enough work credits. I'd also like a sober living home as I struggle with substance abuse. And I don't want any roommates either."

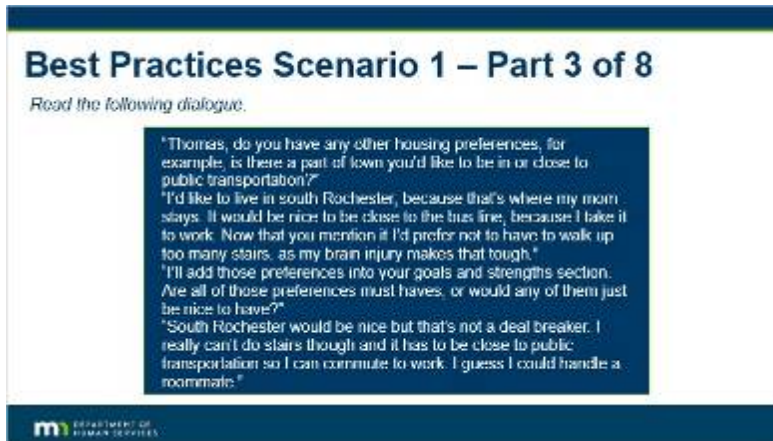
Incorrect (Slide Layer)



Correct (Slide Layer)



6.5 Best Practices Scenario 1 – Part 3 of 8



The screenshot shows a presentation slide with a dark blue header and footer. The header contains the title "Best Practices Scenario 1 – Part 3 of 8". Below the title, the instruction "Read the following dialogue." is written. A central white box with a dark blue border contains a dialogue between two characters. The footer features a logo with the letter "m" and the text "DEPARTMENT OF HUMAN SERVICES".

Best Practices Scenario 1 – Part 3 of 8

Read the following dialogue.

"Thomas, do you have any other housing preferences, for example, is there a part of town you'd like to be in or close to public transportation?"

"I'd like to live in south Rochester, because that's where my mom stays. It would be nice to be close to the bus line, because I take it to work. Now that you mention it I'd prefer not to have to walk up too many stairs, as my brain injury makes that tough."

"I'll add those preferences into your goals and strengths section. Are all of those preferences must haves, or would any of them just be nice to have?"

"South Rochester would be nice but that's not a deal breaker. I really can't do stairs though and it has to be close to public transportation so I can commute to work. I guess I could handle a roommate."

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Notes:

Read the following dialogue.

"Thomas, do you have any other housing preferences, for example, is there a part of town you'd like to be in or close to public transportation?"

"I'd like to live in south Rochester, because that's where my mom stays. Also, it would be nice to be close to the bus line, because I take it to work. Now that you mention it I'd prefer not to have to walk up too many stairs, as my brain injury makes that tough."

"I'll add those preferences into your goals and strengths section. Are all of those preferences must haves, or would any of them just be nice to have?"

"South Rochester would be nice but that's not a deal breaker. I really can't do stairs though and it has to be close to public transportation so I can commute to work. I guess I could handle a roommate."

6.6 Best Practices Scenario 1 – Part 4 of 8

Best Practices Scenario 1 – Part 4 of 8

Read the following dialogue. Select the best response.

"Okay, great. I'll make a note which of your preferences are must haves and would be nice. Before we take a look at the options for providers, do you have someone we can put down as a reference?"

"What do you mean?"

"A reference is someone who can speak on your behalf. It really can be anyone."

"A reference can be anyone you know and trust, like a family member, boss, co-worker, religious figure, mentor, or parole officer."

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Notes:

Read the following dialogue. Select the best response.

"Okay, great. I'll make a note which of your preferences are must haves and would be nice. Before we take a look at the options for providers, do you have someone we can put down as a reference?"

"What do you mean?"

Incorrect (Slide Layer)

Best Practices Scenario 1 – Part 4 of 8

Read the following dialogue. Select the best response.

✖ Incorrect.

Give examples of the type of people who are typically non-housing related support references such as a boss, co-worker, family member, mentor, parole officer or religious figure.

Close

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Correct (Slide Layer)

Best Practices
Read the following dialogue. Select the best response.

Correct!

Give examples of the type of people who are typically non-housing related support references such as a boss, co-worker, family member, mentor, parole officer or religious figure.

Close

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6.7 Best Practices Scenario 1 – Part 5 of 8

Best Practices Scenario 1 – Part 5 of 8
Read the following dialogue. Select the best response.

"Okay, let me text my brother and see if he would be a reference."

Thomas texts his brother and gets a response.

"Okay, he said he would."

"Okay, great. I'll write your brother's name and contact here. Another topic in your housing focused person-centered plan is about ways to reduce possible risks."

"What's that mean?"

Option 1: "It's a way to increase the chances of finding a home that suits most of your requirements."

Option 2: "It's a way to prepare for issues a person may have in keeping and staying in a home and developing a plan to address these issues."

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Notes:

Read the following dialogue. Select the best response.

"Okay, let me text my brother and see if he would be a reference."

Thomas texts his brother and gets a response.

"Okay, he said he would."

"Okay, great. I'll write your brother's name and contact here. Another topic in your housing focused person-centered plan is about ways to reduce possible risks."

"What's that mean?"

Incorrect (Slide Layer)

The slide is titled "Best Practices Scenario 1 – Part 6 of 8" and includes the instruction "Read the following dialogue. Select the best response:". It features a feedback box with a red "X" icon and the text "Incorrect." Below this, it explains that risk mitigation can include assistance with getting references for landlords, expunging felonies, assisting with financial transactions (such as auto-pay), and going over leases so people understand the parameters of a contract. It also includes a quote: "It's a way to prepare for issues a person may have in keeping and staying in a home and developing a plan to address these issues." At the bottom of the feedback box is a "Close" button. The slide footer shows the logo for the "m" DEPARTMENT OF HUMAN SERVICES.

Correct (Slide Layer)

The slide is titled "Best Practices Scenario 1 – Part 6 of 8" and includes the instruction "Read the following dialogue. Select the best response:". It features a feedback box with a green checkmark icon and the text "Correct!" Below this, it explains that risk mitigation can include assistance with getting references for landlords, expunging felonies, assisting with financial transactions (such as auto-pay), and going over leases so people understand the parameters of a contract. It also includes a quote: "It's a way to prepare for issues a person may have in keeping and staying in a home and developing a plan to address these issues." At the bottom of the feedback box is a "Close" button. The slide footer shows the logo for the "m" DEPARTMENT OF HUMAN SERVICES.

6.8 Best Practices Scenario 1 – Part 6 of 8

The slide is titled "Best Practices Scenario 1 – Part 6 of 8" and includes the instruction "Read the following dialogue. Select the best response:". The dialogue is as follows:
"Thomas, you may want someone to walk through a lease for you, so that you understand what is required of you and what rights you have or maybe provide communication assistance with your landlord or neighbors."
"Okay that makes sense. I'd like to have someone walk through the lease with me, and assist me with communicating with my landlord and neighbors as well as set up automatic transfers from my SSDI payments."
"Great. I'll include all of those notes in your risk mitigation section."
"Thanks. What else do we have to do?"
Below the dialogue are two response options in green boxes:
"Now we have to pick a provider. Here is the list. I'll highlight the ones for you that serve Olmsted county, and specifically Rochester."
"You're going to want to pick the Armstrong Housing Authority as a provider. I have worked with them before and they are the best."

Notes:

Read the following dialogue. Select the best response.

"Thomas, you may want someone to walk through a lease for you, so that you understand what is required of you and what rights you have or maybe provide communication assistance with your landlord or neighbors. "

"Okay that makes sense. I'd like to have someone walk through the lease with me, and assist me with communicating with my landlord and neighbors as well as set up automatic transfers from my SSDI payments."

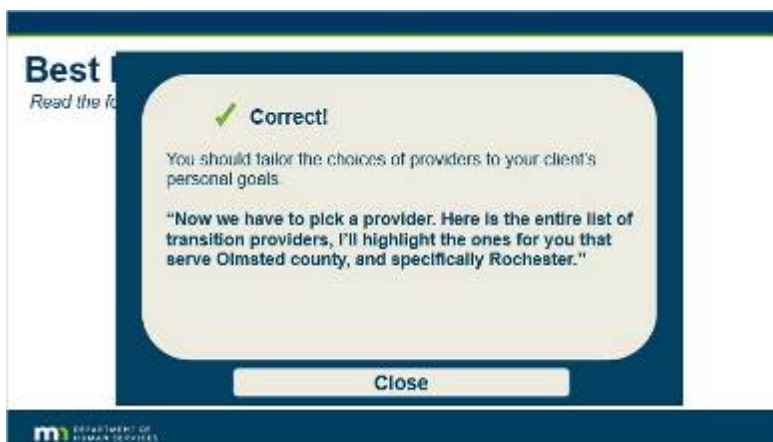
"Great, I'll include all of those notes in your risk mitigation section."

"Thanks. What else do we have to do?"

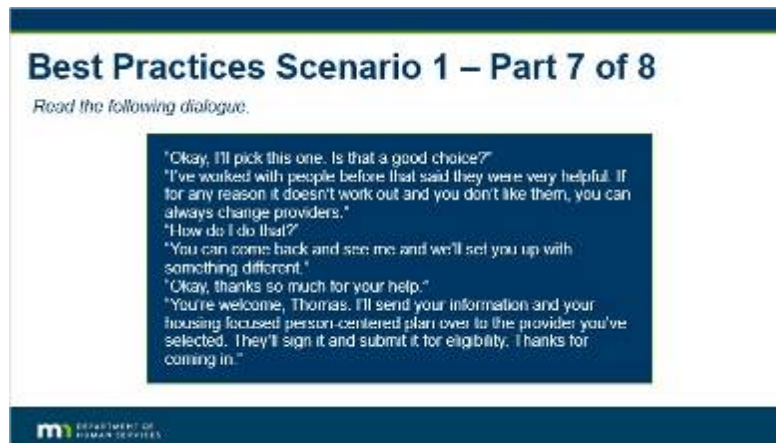
Incorrect (Slide Layer)



Correct (Slide Layer)



6.9 Best Practices Scenario 1 – Part 7 of 8



Best Practices Scenario 1 – Part 7 of 8

Read the following dialogue.

- "Okay, I'll pick this one. Is that a good choice?"
- "I've worked with people before that said they were very helpful. If for any reason it doesn't work out and you don't like them, you can always change providers."
- "How do I do that?"
- "You can come back and see me and we'll set you up with something different."
- "Okay, thanks so much for your help."
- "You're welcome, Thomas. I'll send your information and your housing focused person-centered plan over to the provider you've selected. They'll sign it and submit it for eligibility. Thanks for coming in."

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Notes:

Read the following dialogue.

"Okay, I'll pick this one. Is that a good choice?"

"I've worked with people before that said they were very helpful. If for any reason it doesn't work out and you don't like them, you can always change providers."

"How do I do that?"

"You can come back and see me and we'll set you up with something different."

"Okay, thanks so much for your help."

"You're welcome, Thomas. I'll send your information and your housing focused person-centered plan over to the provider you've selected. They'll sign it and submit it for eligibility. Thanks for coming in."

6.10 Best Practices Scenario 1 – Part 8 of 8

Best Practices Scenario 1 – Part 8 of 8

Read the following dialogue.

"How am I going to know what happens?"

"Once I submit the documentation for eligibility, I'll get an email within a few days that lets me know if you're eligible and then I'll contact you. You will also receive notification in the mail in the next few weeks, but sometimes sooner. This is what the notification will look like."

Show the client an example of the letter.

"Ok. You can contact me by sending an email."


"Okay, is this the best email for you?"

"Yes, that'll work."


"Great, and is this contact number the best way to reach you via phone?"

"Yes it is. Thank you."

"Thanks Thomas, I'll contact you soon."



Thomas's Housing Focused Person-Centered Plan



Notes:

Read the following dialogue.

"How am I going to know what happens?"

"Once I submit the documentation for eligibility, I'll get an email within a few days that lets me know if you're eligible and then I'll contact you. You will also receive notification in the mail in the next few weeks, but sometimes sooner. This is what the notification will look like."

Show the client an example of the letter.

"Ok. You can contact me by sending an email."

"Okay, is this the best email for you?"

"Yes, that'll work."

"Great, and is this contact number the best way to reach you via phone?"

"Yes it is. Thank you."

"Thanks Thomas, I'll contact you soon."

7. Best Practices Scenario 2


7.1 Best Practices Scenario 2


Best Practices Scenario 2

Let's walk through the following scenario on introduction to planning utilizing tools from HB101.org.

Jane walks into your office. She lives in Bemidji in either her car or a doubled up living situation with her cousin. You have covered the triage questions with Jane. She is over 18, on MA, and has proof of disability (Medical Opinion Form), proof of housing instability, and an assessed need for services (MnCHOICES assessment).

You want to start developing a housing focused person-centered plan based on her needs and wants. It is time to discuss how to use HB101 to document and store information related to her plan.





Notes:

Best Practices Scenario 2

Let's walk through the following scenario on introduction to planning utilizing tools from HB101.org

Jane walks into your office. She lives in Bemidji in either her car or a doubled up living situation with her cousin. You have covered the triage questions with Jane. She is over 18, on MA, and has proof of disability (Medical Opinion Form), proof of housing instability, and an assessed need for services (MnCHOICES assessment).

You want to start developing a housing focused person centered plan based on her needs and wants. It is time to discuss how to use HB101 to document and store information related to her plan.

7.2 Best Practices Scenario 2 – Part 1 of 6

Best Practices Scenario 2 – Part 1 of 6

Read the following dialogue. Select the best response.

"Well, Jane, your eligibility documents are in order. Let's take this opportunity to set you up with a housing focused person-centered plan. A housing focused person-centered plan is designed to be driven by you. These are your choices to make. Do you understand that?"

"Yes, I do."

"Great. There is a helpful tool called HB101.org. It makes it easy to store information securely, and to pass it on to the provider you select. Would you like to use that tool today?"

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Notes:

Read the following dialogue. Select the best response.

"Well Jane, your eligibility documents are in order. Let's take this opportunity to set you up with a housing focused person-centered plan. A housing focused person-centered plan is designed to be driven by you. These are your choices to make. Do you understand that?"

"Yes, I do."

Incorrect (Slide Layer)

Best Practices Scenario 2 – Part 1 of 6

Read the following dialogue. Select the best response.

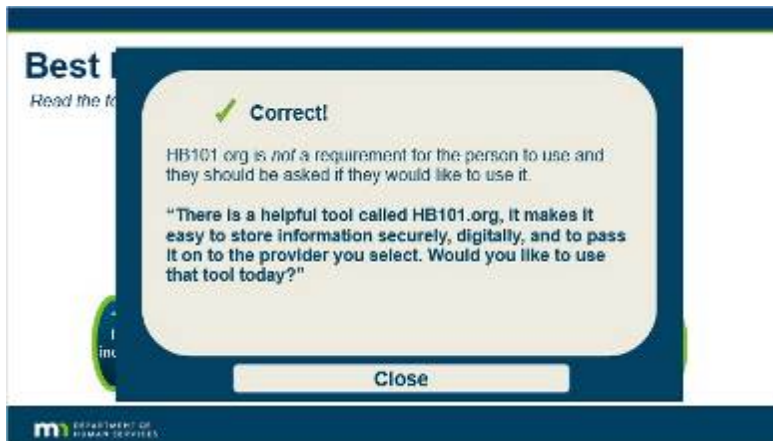
"Well, Jane, your eligibility documents are in order. Let's take this opportunity to set you up with a housing focused person-centered plan. A housing focused person-centered plan is designed to be driven by you. These are your choices to make. Do you understand that?"

"Yes, I do."

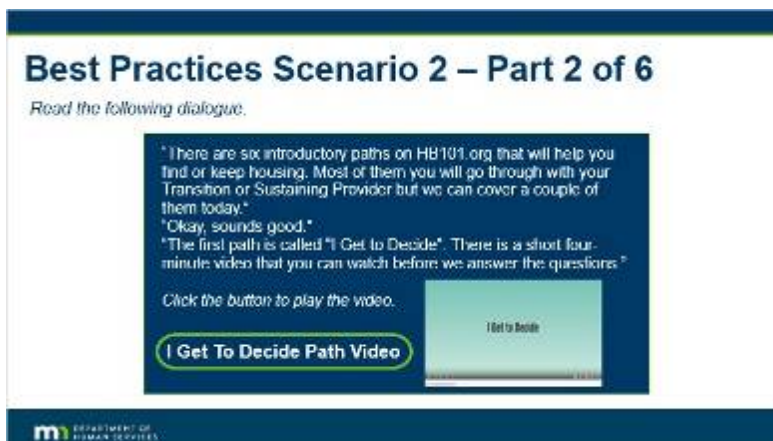
"Great. There is a helpful tool called HB101.org. It makes it easy to store information securely, and to pass it on to the provider you select. Would you like to use that tool today?"

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Correct (Slide Layer)



7.3 Best Practices Scenario 2 – Part 2 of 6



Notes:

Read the following dialogue.

“There are six introductory paths on HB101.org that will help you find or keep housing. Most of them you will go through with your Transition or Sustaining Provider but we can cover a couple of them today.”

“Okay, sounds good.”

“The first path is called “I Get to Decide”. There is a short four-minute video that you can watch before we answer the questions.”

Click the button to play the video.

7.4 Best Practices Scenario 1 – Part 3 of 6

Best Practices Scenario 2 – Part 3 of 6

Read the following dialogue. Select the best response.

"Now that you've watched the video. Do you have any questions before we proceed?"
"No, I don't. Thanks."
"Great, let's work through this path together."
"Okay, sounds good."
"Who chooses your housing? There are three choices. One. My case manager tells me. Two. It's my choice. Three. My family decides."
"My family decides."

"Okay, we'll write down your family decides. We'll have your transition provider contact your family when it's time to select a place to live."

"I understand why you might think your family decides because maybe they help you with a lot of decisions. In the end, you decide."

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Notes:

Read the following dialogue. Select the best response.

"Now that you've watched the video. Do you have any questions before we proceed?"

"No, I don't. Thanks."

"Great, let's work through this path together."

"Okay, sounds good."

"Who chooses your housing? There are three choices. One. My case manager tells me. Two. It's my choice. Three. My family decides."

"My family decides."

Incorrect (Slide Layer)

Best Practices Scenario 2 – Part 3 of 6

Read the following dialogue. Select the best response.

✗ Incorrect.

This is a housing focused person-centered plan. Your person, not her family, chooses their housing.

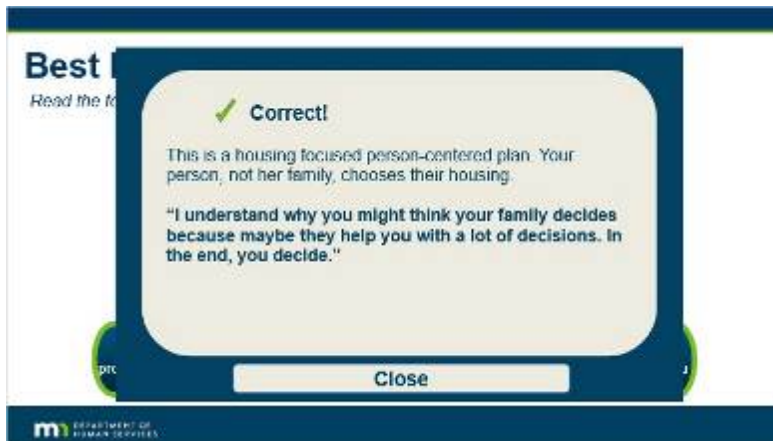
"Who chooses your housing? There are three choices. One. My case manager tells me. Two. It's my choice. Three. My family decides."

"My family decides."

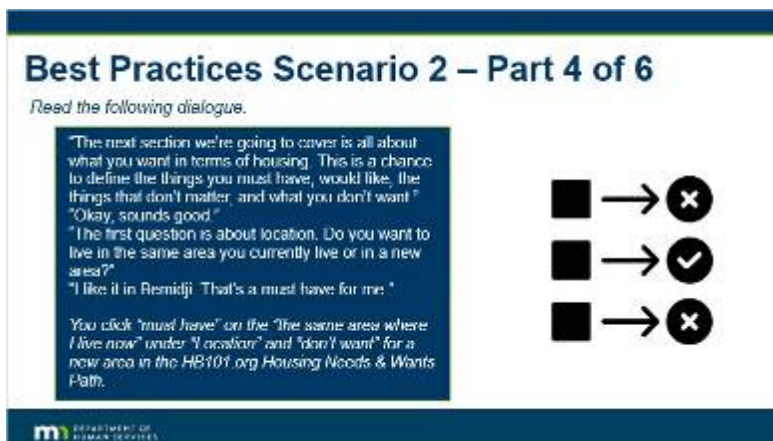
Close

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Correct (Slide Layer)



7.5 Best Practices Scenario 2 – Part 4 of 6



Notes:

Read the following dialogue.

“The next section we’re going to cover is all about what you want in terms of housing. This is a chance to define the things you must have, would like, the things that don’t matter, and what you don’t want.”

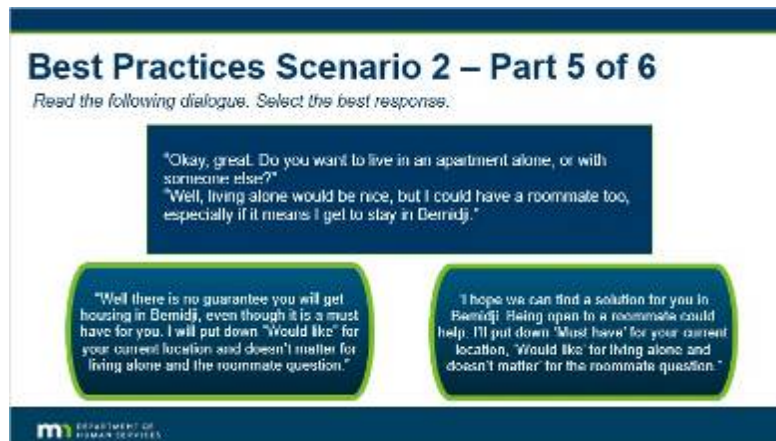
“Okay, sounds good.”

“The first question is about location. Do you want to live in the same area you currently live or in a new area?”

“I like it in Bemidji. That’s a must have for me.”

You click “must have” on the “the same area where I live now” under “Location” and “don’t want” for a new area in the HB101.org Housing Needs & Wants path.

7.6 Best Practices Scenario 1 – Part 5 of 6



Best Practices Scenario 2 – Part 5 of 6

Read the following dialogue. Select the best response.

"Okay, great. Do you want to live in an apartment alone, or with someone else?"

"Well, living alone would be nice, but I could have a roommate too, especially if it means I get to stay in Bemidji."

"Well there is no guarantee you will get housing in Bemidji, even though it is a must have for you. I will put down 'Would like' for your current location and doesn't matter for living alone and the roommate question."

"I hope we can find a solution for you in Bemidji. Being open to a roommate could help. I'll put down 'Must have' for your current location, 'Would like' for living alone and doesn't matter for the roommate question."

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Notes:

Read the following dialogue. Select the best response.

"Okay, great. Do you want to live in an apartment alone, or with someone else?"

"Well, living alone would be nice, but I could have a roommate too, especially if it means I get to stay in Bemidji."

Incorrect (Slide Layer)



Best Practices Scenario 2 – Part 5 of 6

Read the following dialogue. Select the best response.

✖ Incorrect.

It is not your place to assess how successful a person might be in finding what they want. The Housing Consultation service is strictly for documenting eligibility and determining their goals and wants for housing in their housing focused person-centered plan.

"Okay, great. Do you want to live in an apartment alone, or with someone else?"

"Well, living alone would be nice, but I could have a roommate too, especially if it means I get to stay in Bemidji."

"Well there is no guarantee you will get housing in Bemidji, even though it is a must have for you. I will put down 'Would like' for your current location and doesn't matter for living alone and the roommate question."

"I hope we can find a solution for you in Bemidji. Being open to a roommate could help. I'll put down 'Must have' for your current location, 'Would like' for living alone and doesn't matter for the roommate question."

Close

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Correct (Slide Layer)

Best Practices Scenario 2 – Part 6 of 6

Read the following dialogue.

Correct!

It is not your place to assess how successful a person might be in finding what they want. The Housing Consultation service is strictly for documenting eligibility and determining their goals and wants for housing in their housing focused person-centered plan.

"Okay, I hope we can find a solution for you in Bemidji. Being open to a roommate could help. I'll put down 'Must have' for your current location, 'Would be nice' for living alone and 'doesn't matter' for the roommate question."


Close

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7.7 Best Practices Scenario 2 – Part 6 of 6

Best Practices Scenario 2 – Part 6 of 6

Read the following dialogue.



"Will all of my preferences be saved so I don't have to do this twice?"

"That's right. We'll store all your preferences on your HB101.org account and when you select a service provider they can log in with you and continue the process. I am also writing your preferences down in your housing focused person-centered plan."

"Thank you for all your help with this."

"You're welcome Jane. Let's just walk through the rest of these preferences and you tell me what you must have, what you would like, what doesn't matter and what you don't want. Does that sound good?"

"Sounds good."

Continue with the person to complete the remainder of the "Housing Needs & Wants" path according to their preferences.

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Notes:

Read the following dialogue.

"Will all of my preferences be saved so I don't have to do this twice?"

"That's right. We'll store all your preferences on your HB101.org account and when you select a service provider they can log in with you and continue the process. I am also writing your preferences down in your housing focused person-centered plan."

"Thank you for all your help with this."

"You're welcome Jane. Let's just walk through the rest of these preferences and you tell me what you must have, what you would like, what doesn't matter and what you don't want. Does that sound good?"


"Sounds good."

Continue with the person to complete the remainder of the "Housing Needs & Wants" path according to their

preferences.

8. Takeaways

8.1 Takeaways



Takeaways

Section I - Module Two – Introduction to Planning

In this module you learned how to:

- Define the role of a Housing Consultant,
- Identify the primary components of a Housing focused person-centered plan, and
- Recognize the value of HB101.org as a useful tool for providers and recipients of this service.

Up next is Section I: Module Three - HB101.org

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Notes:

Takeaways

Section I - Module Two - Introduction to Planning

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8.2 End Screen



Notes:

Congratulations!

You have completed:

Section 1 - Module Two: Introduction to Planning

Click the Exit course button to exit the course.