

HFH Required Documents

Universal Consent (Valid 5+ years)

- Limited or Full Consent: All ICMS service and documentation requirements can be completed.
- Missing/Expired/Revoked Consent: All ICMS documentation requirements can be completed, but no health care coordination support or referrals to other services are allowed.
- Please never add in CHAMP any details on diagnosis or treatment for MH or SUD, regardless of the consent type.

Notice of Privacy Practices (Doesn't expire)

CalAIM Community Supports Verbal Opt-Ins

- Only needed upon request from DHS

Client Demographics

Name, SSN, DOB, HMIS ID, Gender Identity, Ethnicity, Race, Primary Language, Primary Phone #

Please don't use special characters in any text field:

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Assessments

Assess at check-in and reassess every 90 days:

- If not yet housed, complete the 5X5
- If permanently housed, complete both the 5X5 and the Housing Acuity Index (HAI)

- Higher 5x5 scores = higher needs.
 - Higher HAI scores = more stability.
- For each Assessment completed, record the "Assessment" Service in the Case Note.

Unsuccessful Outreach Attempts

Record the Unsuccessful Outreach Attempt Service in a Case Note for the following scenarios:

- Driving around to look for a missing participant with no success.
- Participant doesn't respond to a phone call or text.
- Visiting an IH facility, but the participant is MIA.
- Participant doesn't answer the door during a home visit.
- Checking emergency contacts, local hospitals, and LASD Inmate Locator with no success.

Permanent Housing (PH) Updates

CURRENT STATUS SELECT ONE OF THE FOLLOWING: 1. Active/Attempting to Engage 2. Active/Engaged in Housing Placement 3. Active/Housed	MOVE-IN DATE Homelessness End Date (Doesn't change when a housed person relocates to a new apartment)
ICMS CASE MANAGER Update Assignments Here (Never click Care Team)	ADDRESS Always include SPA/City/State/Zip (If unhoused write Homeless in Address Line 1)
SUBSIDY APPLICATION DATE Key Housing Navigation Milestone	WHEN SAVING PH UPDATES ☒ Always click Save ☒ Never click No Changes



Complete 1 PH Update Per Calendar Month

For each PH Update completed, record the "Homeless System of Care Linkage/Coordination" Service in the Case Note.



Interim Housing = Still experiencing homelessness (not permanently housed)

ICMS Exit Requests

- Please **never** enter an "Inactive" status or "Inactive Date" or "Check-Out" Date. These functions are connected to ICMS Exits and are to be completed by **DHS staff only**.
- Do not submit Exit Requests for permanently housed participants (even if they are in jail) without prior DHS approval.
- If a participant is unfortunately deceased, or they are not yet housed and you have been unable to reach them for 30+ days after exhausting all search options, then submit an [ICMS Exit Request](#).

Use the Care Plan to develop at least one SMART Goal in collaboration with the participant within 30 days of project check-in, then record New/Pending and Complete Action Steps to guide and track progress towards achieving the Goal(s). The Goal(s) should support HFH's Mission to help participants obtain and maintain permanent housing. Long-term Goals are okay.



For each Action Step completed and recorded in the Care Plan, record the appropriate Service (according to the table below) when writing the Case Note explaining what you did.



Record 2 or more Services per Calendar month. Participants with a high billing rate require a minimum of 2 in-person encounters per month; the requirement is 1 per month for a low billing rate.

Action Steps				Services
- CES Packet Completion - HMIS or RMS Update	- Incident Report - Match To Housing and/or Services	- Intake - Opt-In	- PH Update - Universal Consent	Homeless System of Care Linkage/Coordination
5x5 - Housing Acuity Index	- Psychosocial - In-Home Caregiving Assessment			Assessment
- SMART Goal - Complete Action Step	- New/Pending Action Step - Cancelled Action Step	Goal Outcome		Care Plan Development/Update
- CalFresh - General Relief	- In-Home Supportive Services (IHSS) - Medi-Cal	- Medicare - SSDI	- SSI Unemployment - Veterans Affairs	Mainstream Benefits Assistance
- Accompaniment to Appointment - Basic Needs Assistance - Build Rapport - Care Linkage	- Case Conference - Debt Resolution - Document Collection & Submission - Family Reunification	- Housing Search - Landlord/Property Manager Engagement - Legal Issue Resolution	- Life Skills Coaching - Transportation Coordination	Housing Navigation Support
- Furniture & Household Item Acquisition - Lease Signing - Map Nearby Points of Interest	- Move-In Coordination - Orient Tenant To Unit/Building/Community - Review Lease Rules & Responsibilities	- Security & Utility Deposit Coordination - Unit Modification Coordination - Utilities Setup		Move-In Coordination/Support
- Accompaniment to Appointment - Advocacy - Basic Needs Assistance - Budgeting & Money Management	- Build Rapport - Care Linkage - Case Conference - Crisis Intervention - Debt/Arrears Resolution - Dispute Resolution	- Document Collection & Submission - Eviction Prevention Counseling - Family Reunification - Health & Safety Visit	- Lease Renewal - Life Skills Coaching - Mediation with Property Manager/Neighbor - Reasonable Accommodation - Safety Plan	- Subsidy Recertification - Tenancy Education - Transition of Care Visit - Transportation Coordination - Unit Habitability Inspection - Wellness Check

SMART Goal*

Action Steps

Please record the steps that need to be completed to attain the goal detailed above.

Set 1 New/Pending Action Step every 90 Days at minimum
What you're working on to complete next

	Action Step Title*	Set Date*	Target Date*	Assigned To*	Status	Completion Date
☒	Obtain Social Security Card	07/10/2023	08/31/2023	Case Manager	New/Pending	
☒	Basic Needs Assistance	07/05/2023	07/05/2023	Case Manager	Complete	07/05/2023

Record Case Note?* ☒ Yes ☐ No

☒ Check if you wish to record services associated with this note

Complete 1 Action Step every 90 Days at minimum
Progress you've made so far

Services

Use the fields below to record the services provided in association with the note above.

	Service Date*	Service*	Enrollment	Place of Service	Units of Measure	Unit Value	Units
☒	07/05/2023	Housing Navigation Support	05/02/2023 - Perm..	Interim Housing	Count	\$0.00	1.00
☒	07/10/2023	Care Plan Development/Upd..	05/02/2023 - Perm..	Office	Count	\$0.00	1.00

When did you provide the Service?

Which Service did you provide?

Always select the permanent housing enrollment.

Where did you provide this Service?

Never edit these data fields. Leave as is.

You can record more than one Service in a Case Note, but please only record one Service per line.