

FL-507 RRH NAVIGATION PROJECTS



2020

RRH Navigation Workflow Timelines

The purpose of this document is to describe the workflow of the RRH Projects managed by Homeless Services Network of Central Florida. The goal of this timeline is to identify important milestones in the process of serving Homeless Individuals and Households in COC FL-507 and who are funded by HUD Bundle and/or jurisdictional grants.

RRH NAVIGATION WORKFLOW TIMELINES

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Navigation

A successful Coordinated Entry System can help communities mitigate bureaucratic pitfalls by providing navigation assistance to families/youths experiencing homelessness. This assistance comes in the form of dedicated navigators— well-trained individuals familiar with local housing processes and requirements— to provide step-by-step support to those experiencing homelessness who have been identified, assessed and added to the full registry (by-name list). Agencies participating in RRH Projects are required to await Navigation Assignment through CES) Coordinated Entry System). Prioritized participants will be assigned during pertinent Registry Meeting or other means of communication by CES Staff.

Navigation Agency Assignment

- A** Navigation Assignment is conducted by CES staff during Registry Meetings.
 - a. HSN CES staff will assign the *Navigation Start Date* and *Community Navigator Agency* fields to the [Navigation Tracking Sub-Assessment] located within HMIS>Assessments Tab>Navigation – Coordinated Entry Systems (CES) assessment.
 - b. CES will also assign navigation in the 3 fields below the Navigation Tracking sub-assessment (Community Navigator Agency, Participant Status, and Navigator).
 - c. Grants will verify CES assignment in HMIS for eligible reimbursement navigation tasks
 - d. CES will monitor to ensure a participant does not remain assigned for navigation services no more than 60 days from assignment.

Navigator Process – Initial Follow-Up: Verifying Participant Living situation

- A** Assigned Navigator will EDA into their designated Regional Big Three Provider
 - Note:** Regional Big Three providers are assigned to users based on the location the agency serves (some agencies may have all three). User should use the EDA that corresponds with where the participant is residing at the time of Assessment.
 - a. Regional Big Three Orange County- 923
 - b. Regional Big Three – Osceola County- 924
 - c. Regional Big Three – Seminole County-925
- B** Contact – Verification of Participant’s Current Living Situation
 - a. Navigator must make *Initial Contact with participant within 2 business days from date of assignment.*
 - b. At first contact via phone, text or email:
 - i If the Participant’s **current living situation is resolved** (no longer homeless), or if participant declines services, please update the following fields within the Navigation – Coordinated Entry Systems (CES) Assessment>Navigation Tracking sub- assessment:
 - ii Enter participant’s living situation status within Navigation Tracking Sub-Assessment in the Navigation – Coordinated Entry Systems (CES) assessment. This assessment is located within the Assessments Tab in HMIS.
 - iii Add Navigation End Date

- iv Add Navigation Outcome
- v In three fields below Navigation Tracking:
 - (a) Deselect all options from *Community Navigator Agency* field
 - (b) Select appropriate field for participant situation (verify HMIS checklist for appropriate client status)
 - (i) If participant is not homeless, select *Housed*
 - (ii) If participant is not interested in housing services, select *Not Interested in Housing*
 - (iii) If you are unable to reach participant after three attempts, select *Whereabouts Unknown*
 - (c) Deselect all options for *Navigator* field
- vi Add CES Case Note
 - (a) The following standards must be adhered to for case notes to ensure meaningful documentation is being captured for the next reader. Case Notes should be completed for any and all interactions or attempted interactions with participants. Document updates in Navigation tracking sub-assessment in HMIS and add case notes immediately but no more than two (2) business days from date of interaction. Case Notes should always include the following key components:
 - (i) Purpose: Reason for contact.
 - (ii) Assessment: What is the participant situation?
 - (iii) Plan: What will be done in light of the assessment?
 - (b) Copying and pasting emails or text messages is not recommended. Always put details in context.
 - (c) Initial all case notes in HMIS with navigators first and last name initials.
- vii Once all fields are updated, participant is considered *Closed Out* of Navigation. This means the Navigator has no responsibility to continue to reach out. If participant reaches out to Navigator in the future in need of services, the Navigator should make contact with CES. If there is pace for navigation to be re-open and re-start CES will reassign Navigation. CES will *Add* a new Navigator Tracking field to reflect navigator is working with participant again. If there is no capacity participant will have to wait for if and when services become available.
- c. If the Participant's **current living situation is homeless** at point of contact, and the participant wants to receive services, update the following fields:
 - i [Enter participant's living situation status within Navigation Tracking Sub-Assessment](#) in the Navigation – Coordinated Entry Systems (CES) assessment. This assessment is located within the Assessments Tab in HMIS.
 - ii Navigator will [add themselves as Case Manager](#) in the Case Manager Tab under the Regional Big Three EDA. **Note:** This does not mean you are the assigned Program Case Manager, just the current

participant's point of contact in HMIS.

- iii Navigator to add initial CES Case Note within the Assessments Tab. Case Notes should always include a purpose, assessment and plan.
i.e: Participant has been assigned to navigator by CES. Navigator made contact via phone to advise of assignment and to verify living situation. Participant reports living in her car for the last few months with three minors. Navigator asked if family would be interested in shelter. Navigator completed Shelter Matching Tool and made appointment for 06/01/2020. Navigator will verify homeless situation and gather required docs at scheduled meeting. JB
- iv Navigator will schedule time to meet with participant to complete navigation process.
- v Navigator will document status of navigation on a weekly basis in HMIS under CES case notes

Navigator Process – Participant confirmed homeless: Documentation

- A Navigator will continue to meet and work with participant no more than 60 days from date of assignment to gather and upload documentation necessary per eligibility requirements. Documentation is to be uploaded in the File Attachments section under the Participant Profile tab.
- B Please see required documentation checklist for guidance on required documentation.
 - Feel free to attach as many documents under one file attachment that HMIS may allow.
- C Always add CES Case Notes to account for your work.

Navigator Process – Closing the loop: Navigation process conclusion

- A Once participant is Document ready, the Navigator will [send referral](#) to CES Match (RRH 811) via HMIS.
Note: Participant is ready for a Rapid Re-Housing referral when they are document ready and information has been documented in HMIS.
 - i. A referral should be sent for head of household only. There is no need to select the whole household.
 - ii. Referrals are reviewed by CES on a weekly basis.
 - iii. Referral statuses can be viewed via HMIS. The referral can have the following statuses:
 - (a) Accepted= all requirements are met, awaiting case management assignment. Participant will remain on navigator caseload until assignment.
 - (b) Declined= requirements were not met. An email will be sent to navigator explaining reason for decline and correction needed if any.
 - (c) Blank= referral review still in process.
 - (d) Canceled= referral sent in error and will not be reviewed

Client Information		Service Transactions				
Needs	Services	Referrals	Shelter Stays	Entire Service History		
Previous Referrals						
Select Dates		Start Date	End Date			
-Select-				More Search		
Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
02/28/2020	02/28/2020	Homeless Services Network-Rapid Rehousing Match:CES	Cancelled	Rapid Re-Housing Programs	Closed	
02/27/2020	02/27/2020	Homeless Services Network-Rapid Rehousing Match:CES	Cancelled	Rapid Re-Housing Programs	Closed	
Add Referral						
Showing 1-2 of 2						

- iv. **Referral Outcome 1: Referral is declined** due to ineligibility
 - (a) If reason for decline is due to ineligibility (i.e. over income, homeless status, etc.):
 - (i) Update the Navigation Tracking sub-assessment with the appropriate outcome
 - (ii) Update the three fields below Navigation Tracking:
 - Deselect all options from *Community Navigator Agency* field
 - Select appropriate client status for participant situation
Example: Of participant is over income, select *Over income*
 - (iii) Add CES case note indicating that Navigator informed participant of status
 - (iv) Provide any necessary resources deemed necessary
 - (v) Add end date (date Navigator informs participant of declined referral)
 - (vi) End self as Case Manager in Case Manager tab.
- v. **Referral Outcome 2: Referral is declined** due to lack of documentation:
 - (a) Leave Navigation Tracking as is
 - (i) Continue to add CES case notes on weekly basis indicating updates
 - (ii) Once the participant's documents are updated satisfactorily, re-send referral to CES Match (RRH 811) via HMIS.
- vi. **Referral Outcome 3: Referral is accepted**: Participant is approved for Case Management services
 - (a) Update Navigation tracking sub-assessment once participant is assigned to a Housing Case Manager
 - (i) Add Navigation End Date (date participant is assigned to Housing Case Manager)
 - (ii) Update Navigation Outcome to reflect Referred to CES and accepted
 - (iii) Add final CES case note
 - (iv) Update the three fields below the Navigation Tracking Sub assessment
 - Deselect all options from *Community Navigator Agency* field, leave blank
 - Deselect all options for *Participant Situation*, leave blank
 - Deselect all options for *Navigator* field, leave blank
 - (v) Go to Case Manager Tab and end self as Case Manager

Workflow/How to Links:

Note: The following workflows are genetic “How To’s” in Service Point (HMIS). It is meant to teach the user how to conduct the process in HMIS.

- ✚ Add Yourself as the Navigator under Case Manager Tab: <https://goo.gl/rNdW1h>
- ✚ Sending a Referral: <https://www.hsncl.org/rapid-rehousing/>
- ✚ Completing Shelter Matching Tool: <https://www.hsncl.org/wp-content/uploads/2020/04/Shelter-Prioritization-Workflow-2020.docx.pdf>
- ✚ Access to all Navigation Documents: <https://www.hsncl.org/rapid-rehousing/>
- ✚ Adding/Removing Someone from the Household; [Common Data Entry Mistakes_Pt 4.pptx](#)