**All referrals will need to go to Carla – using the email address** **info@imsofmn.com**

1. **Carla’s duties include:**
	1. Accept referrals
	2. Receive all referrals
	3. Fill out the referral form
	4. Determine program eligibility – notify if they do not meet program criteria
	5. Track referrals on spreadsheet on the Z drive– include the date of referral, eligibility status, notes etc.
	6. Enter into Procentive
	7. Verify insurance
	8. Assign them to the HSS program and to Dany
	9. Upload all documents into Procentive
	10. Notify Dany of Referral
	11. If the Senior care coordinator, waiver CM, or TCM are making the referral have them provide a signed ROI and contact information
	12. If clients do not have MA, she will refer them to Mower DHS to apply, or to visit them online to complete the application. Encourage them to follow up when they get it (if this is the only reason why they are denied)
2. **Veronica’s duties will include:**
	1. Veronica will be back-up for Carla if out of the office (out on PTO)
		1. If Carla will be back in the office the following business day, referral forms can be sent to Carla instead of doing steps b and c)
	2. Complete the referral form
	3. Send to Dany (Dany will determine eligibility then notify Veronica, cc Carla)
		1. If determined eligible: verify MA and enter client into Procentive. Assign to HSS and to Dany
3. **Dany’s duties will be as follows:**
	1. Add client to our own HSS Tracker
	2. Document attempts to contact client in Procentive
	3. Determine eligibility for consultation
		1. If not eligible for consultation:
* Make arrangements to sign IMS info and ROIs
* Contact necessary providers for documentation needed
* Submit documentation to the state once it is obtained.
	1. Complete the consultation – ensure IMS info and ROIs are completed
		1. Refer for CES if applicable and other referrals as necessary
	2. Submit to the state for approval and upload documents to Procentive
	3. Track the following in HSS Tracker: eligible clients, when if/when consultation is scheduled, when documents are submitted to the state, status updates, etc.
	4. If there is a waitlist, Dany will mail a letter to those clients once they are approved to notify them of the wait list
	5. Complete consultation if renewal is needed and still eligible for consultation.
1. **Transition/Sustaining duties include:**
	1. Once assigned to case upload HSS approval or denials
	2. Upload yearly notices
	3. Document attempts to reach client
	4. Setup a time to meet with client face to face
		1. “HSS Plan” should be completed during first appointment and uploaded to Procentive
		2. Connect with client’s identified supports (i.e. TCM, Waivered Case Manager, Probation, natural supports the client wishes to have involved)
	5. Transition - Meet weekly until housed
		1. If client does not have the ability to be housed (i.e. no income, waiting for voucher, etc.) housing worker should help client complete paperwork necessary/work on activities that would assist with this such as applying for GA, employment related activities, referral to social security advocacy, following up with section 8, etc.
		2. If no activities can be worked on, housing worker should connect with clients on a bi-weekly or monthly basis to follow up on progress.
	6. Notify TCM, Waivered Case Manager, Senior Care Coordinator of expiration date if needing to be renewed (give minimum of 1 month’s notice)
	7. Submit yearly renewals for client’s and upload into Procentive
	8. Ensure ROI’s, IMS info, and IMS Consent forms are up to date
	9. Provide progress updates to client’s team (case manager, etc.) and notify of any concerns.
	10. Make referrals as needed to assist with housing stability: TCM, ARMHS, Therapy, MNChoice, Family Connections, PRC etc. (only if client does not have case manager)
	11. Refer them to CES if they become homeless again
	12. Funds for Deposit/First month’s rent: Worker should use the following resources if at all possible before requesting crest funds: Emergency Assistance, SEMCAC, Salvation Army, Mower Council
	13. Requesting Crest Funds: Worker should contact case manager to see if this is an option. Worker should have w-9 completed by landlord if applicable and provide a copy of the lease including amount for deposit/first month’s rent to case manager
	14. If client has 3 consecutive “no show” appointments, mail “no show” letter and upload to Procentive. Provide update in weekly meeting.
	15. If client is ending HSS services, complete Notice of Choice to End Services and upload to Procentive
	16. Once Housed, client will move to Sustaining Services
		1. Worker will assist client in completing financial updates such as Change Report Form to the client’s financial worker
		2. Create a Sustaining Plan – assist client in identifying specific needs the client has for sustaining and prioritizing needs
		3. Worker may assist client with any housing related activities or activities considered to support client’s housing stability. Some specific activities include but are not limited to: Assisting with: doing a change of address, getting utilities put in their name, getting internet services, obtaining donated furnishings, budgeting skills, cleaning and organization skills, repair requests, communicating with landlords/neighbors, etc.
		4. Make face to face contact with client on a minimum monthly basis