

City of Roanoke Street Outreach Program Standard Operating Procedures



We help those who may not be able to help themselves.

Homeless Assistance Team
339 Salem Avenue
Roanoke, Virginia

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STANDARD OPERATING PROCEDURES

1. Basic Household Items

- a. *Upon request from the client*, client assistance funds can be used to purchase basic household items for clients transitioning into permanent housing **based on availability of funds**.
- b. Basic household items are defined as the following:
 - i. Mattress, box springs, bed frame
 - ii. Dishes and utensils
 - iii. Bedding
 - iv. Household cleaning items
- c. Basic household items must be purchased from local vendors with Human Services Coordinator approval.

2. Bus Passes

- a. Valley Metro:
 - i. If clients are receiving any income, they are not eligible for HAT bus passes. This includes SSI, SSDI, retirement, VA cash benefits, etc.
 - ii. Single ride tickets will be available in the HAT office for short-term use. This includes doctor's appointment, employment, job interview, housing appointment, etc. All of these appointments must first be confirmed by case manager and documented in the client file. Case managers must contact Valley Metro to purchase weekly passes.
 - iii. Daily bus pass distribution must be recorded in the log binder(s).
 - iv. Clients may receive no more than four (4) bus passes per day and a maximum of 8 per week **with documentation** for job search. Additional requests must be approved by the Human Services Coordinator. Case managers must first verify that



business is hiring and applications cannot be completed on-line.

- v. Weekly bus pass distribution must be recorded on the case management and services provided form as well as included in HMIS.
- vi. Weekly and/or individual passes shall only be provided until first pay check is received.
- vii. Bus passes may be provided for one time only to register at Virginia Western Community College.
- viii. Bus pass(s) may be provided for initial transport to probation and parole.
- ix. Donated bus passes may be provided with the approval of Human Services Coordinator or designee.

b. Greyhound:

- i. A Greyhound bus ticket can be purchased for clients who are unable to work or are entering a long term treatment program with approval from the Human Services Coordinator. Procedures for verifying bus passes are as follows:
 - (1) Case manager verifies homelessness and conducts intake.
 - (2) Case manager calls to get price of ticket and time of next bus departure.
 - (3) The client is taken to the bus station at the required time. All efforts should be made to schedule departure during HAT hours of operation.

3. Cell Phones



- a. There is a combined total of 400 free minutes allowed for HAT cell phones. Staff should review minutes periodically to avoid exceeding this allotment.
- b. HAT personnel are prohibited from giving cell phone numbers to clients.
- c. When driving a city vehicle, every effort should be made to come to a complete stop away from traffic before answering the cell phone or allow another employee to answer. A city operable cell phone must be in vehicle at all times during outreach/transport.

- d. Employee personal cell phones shall be on vibrate and may be used for emergency calls only **during HAT operating hours (including street outreach)**.
- e. HAT cell phones are to remain in the designated space during office hours for charging.

4. Chain of Command

- a. The chain of command for HAT personnel consists of the following:
 - Human Services Director
 - Human Services Coordinator
 - Employee (s)
- b. HAT personnel should follow procedures when problems and conflicts arise with fellow employees:
 - i. The first action is to talk directly with the person involved. Clearly state the behavior that they exhibit causing distress or conflict. Tell the person how you are feeling. Avoid judgment statements, name-calling. Together, decide on an appropriate course of action to resolve the conflict.
 - ii. If the problem persists, talk to your co-worker again. Decide if you both are following the plan that was agreed upon. Discuss and agree upon any necessary modifications to your plan.
 - iii. If the problem persists, consult with the Human Services Coordinator.
- c. HAT employees are eligible to participate in the City's Grievance Procedure, Personnel Operating Procedure #6. Please refer to the city's POPs which can be found on Lotus Notes.

5. Condemnation/Eviction Notices

- a. In the event a client becomes homeless as a result of a building condemnation/eviction, case managers should document the address, obtain a copy of the condemnation/eviction notice, and notify the Human Services Coordinator. Client may receive assistance if within 48 hour window.

6. Confidentiality

- a. All matters related to clients are considered confidential and should not be discussed with persons outside the HAT staff unless expressed written permission is given by the client for the purpose of securing necessary services and for additional information.

7. Documentation and Case File Maintenance

- a. All contacts and engagements with clients and ineligible contacts (**including field intakes, front desk questions and telephone calls**) must be documented legibly in ink or typewritten within two working days. This includes all notes on HMIS. It is imperative that all critical information be documented immediately. If the client is reluctant to give his name, HAT personnel should document nicknames and physical description.
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- b. HAT case managers will maintain files on every client.
 - c. Each client file must include photo documentation. If no photo ID is available from the client or if the ID is not clear, staff should use the department's digital camera and take a photo of the client. **The "Consent to Photograph" form must be included in client's file.** If client rejects photo, documentation shall be made in the clients file. A thorough description should be included in the file if no photo is available using the client identification form.
 - d. Client folders contain the following:
 - i. Intake Form
 - ii. Consent Form
 - iii. Verification of Homelessness
 - iv. Client case notes including a record of all assistance provided and amount of time spent with client. At no time should client information be shredded once it becomes a part of the client file. An addendum should be made to the case notes and the pertinent information marked VOID.
 - v. Individual Service Plan (ISP) - The Human Services Coordinator will review action plans on a regular basis to ensure accuracy and compliance with HUD Guidelines.

- vi. Record of time spent with each client
 - vii. Other information including physician diagnosis, written correspondence, copies of social security card, drivers license, green cards, assignments given to client
 - viii. Discharge summary sheet
 - ix. All other information/documentation pertaining to client's case.
 - x. All services must be included on the HMIS system.
- e. New files should be given to the HAT secretary **within two working days** prior to the first filing for number identification and record maintenance.
- f. Clients' personal items may not be stored in their file. In the event that a client inadvertently leaves something in the office, it is the case manager's responsibility to contact the client immediately and ask them to return and pick up their belonging(s). **Exceptions:** Birth certificates, school records and Social Security Cards may be kept in sealed envelope with the client signature/date across the seal. These are items purchased with HUD funds and we don't want to have to re-purchase them.
- g. Closed cases – once a client's file is closed, case managers are required to deliver the file to the secretary. Case managers may not file closed cases. Client files may be closed when:
- i. Client has obtained suitable housing
 - ii. Client is living with family or friends
 - iii. No contact has been made within 1 year (staff **must** contact all area shelters prior to closing client file) e.g. other agencies, jails, last place of employment, etc.
 - iv. Client receives bus ticket out of town

- h. ***Record keeping ranks as one of the most important functions of a case manager.*** Case managers should review their files on a regular basis to ensure accuracy and completeness.
- i. All closed files must also be closed on HMIS within 72 hours.

8. Donations

- a. Clothing and other donated items may be given to clients **without verification of homelessness.**
- b. Any donated items must be logged in the contribution log upon receipt. This must include name, address and phone number of person/affiliation donating items and the dollar amount of donation.

9. Dress Code

- a. HAT personnel are expected to dress in a professional manner for scheduled meetings and while conducting office based job duties. HAT personnel are expected to dress in a non-threatening, professional, and appropriate manner when conducting field work. HAT personnel must present a clean, neat appearance and wear city identification card at all times.
- b. Uniforms consisting of sweatshirts, denim/cotton shirts and t-shirts are provided. Case managers and aides are required to wear their uniform while on outreach and as directed by the Human Services Coordinator.
- c. In accordance with City policy, employee ID badges must be worn at all times or presented upon request.

10. Electronic Media Usage Policy

- a. All HAT employees must adhere to the City of Roanoke Administrative Procedure #5.10 – Electronic Media Usage Policy. The purpose of the policy is to inform city employees about acceptable and unacceptable uses of electronic media. “Electronic media” may include e-mail, the Internet, the city’s intranet,

telephones, and any other electronic device provided by the city and used by city employees in the furtherance of city business.

11. Eligibility

- a. Persons who are residing in emergency shelters and in locations not designed for sleeping are eligible for HAT services. Persons living in Transitional Living programs may be eligible for HAT services. Please contact your supervisor prior to providing services. **Eligible persons may not be declined or refused services without written justification, proper notification, and due process.**

12. Expenditures

- a. All available resources should be utilized before HAT client assistance funds are expended. For example, local food pantries can provide groceries and household items may be purchased at one of the local thrift stores. 
- b. Client assistance funds may be used for the following:
 - i. Security deposit
 - ii. Used furniture
 - iii. Essential items necessary to re-establish permanent housing
 - iv. Items necessary as condition of employment and/or training (request verification from employer)
 - v. Bus passes
 - vi. Prescribed medications
 - vii. Blankets, socks, hats, gloves, underwear, winter coats and rain gear as available
 - viii. Non-alcoholic beverages (coffee, sodas, bottled water)
 - ix. Identification cards and birth certificates **(for employment, housing, disability and for children to enroll in school)**
- c. Due to the abundance of ID requests, this office will utilize the guidelines as provided by the DMV. **HAT funds may not be used**

to replace drivers' license, obtain copies of driving records or to purchase CDL licenses.

- d. Client assistance funds will be requisitioned from the city. The city's Human Services Coordinator or designated individual must approve all payment vouchers. Case workers must initiate the process and provide the secretary with necessary information in a timely manner to avoid delays.

13. Food

- a. Client assistance funds can be used to purchase food for clients. Case managers should follow these procedures:
 - i. Clients should be encouraged to eat at RAM House, Salvation Army, Samaritan Inn, or the Rescue Mission.
 - ii. Food items may be distributed to homeless persons residing in accommodations not designed for sleeping on an emergency basis only.
 - iii. Food products are not to be distributed in an arbitrary manner. Clients may receive hot coffee and bottled water when available.
 - iv. The amount and type of food distributed must be documented in the client's file and the weekly reporting status log.

14. Gasoline

- a. Client assistance funds can be used to purchase gasoline for client's vehicles for transportation to work, (until first pay-check is received), confirmed job interviews, and medical appointments when the city vehicle is not available. Gasoline will only be provided if appointments are not on Valley Metro bus routes. Case managers should adhere to the following procedures:
 - i. Copy the client's car registration, driver's license, and expiration date.
 - ii. Record the vehicle plate number, make, model, color and year of car.
 - iii. Verify how much gas is in the vehicle. If the client has less than 1/4 tank, 5 gallons of not higher than mid grade

gasoline may be provided. Verify that the registration matches their car.

- iv. HAT staff must accompany the client to an appropriate gas station. Bring the receipt directly back to the HAT secretary, copy should be placed in client file and documented in case notes.

15. Interagency Cooperation

- a. Maintaining positive working relationships with area homeless service providers is of paramount importance. HAT personnel should remember that we all share the same goal – to help the homeless survive and hopefully reach self-sufficiency. Coordination with service providers will be necessary in many cases. Professional courtesy must be maintained at all times when working with other agencies.

16. Media Relations

- a. All inquiries by the media, which include representatives from newspapers, radio, and television, should be directed immediately to the City’s Human Services Coordinator, the Director of Human Services or the office of the City Manager.



17. Motel Accommodations

- a. Staff are prohibited from placing clients in motels using HAT funds. If clients are placed in hotels by other shelters or service providers and are deemed verifiably homeless, staff will continue to provide services. Documentation from service providers must be provided and placed in client file.

18. Office Intake Procedures

- a. Staff calendars are distributed monthly to insure staff coverage. Each week, case managers will be responsible for primary intake as documented on the calendar.

- b. The primary intake worker shall remain in the HAT office during office hours. Backup and outreach staff will be in the field from 9am – 11:30am and notified as needed to assist with client intake.

19. Office Practices

- a. HAT personnel are **required** to sign out when leaving the office indicating destination and expected time of return. Information must be specific. “Field” is not an accepted designated destination.
- b. In the event an employee will be later than the designated time, they must notify the HAT office.
- c. File cabinets must be locked at lunch and upon leaving for the day.
- d. HAT employees are responsible for turning off the lights and other appliances or equipment.
- e. Cash, checks, and car titles may not be kept in client’s files.
- f. Clients’ personal items may not be stored in the HAT office.
- g. All appointments for transports must be logged in the master calendar. Clients should give at least a 24 hour notice to ensure transport availability.
- h. Clients entering the office should be greeted with a friendly smile and welcomed immediately upon entering the office.
- i. Case managers should take reasonable and timely actions to discourage clients from unnecessarily lounging in the waiting area.
- j. All papers containing client names or potentially confidential information must be alphabetically filed in client files and locked at night.

20. Outreach/Street Sweep

- a. HAT personnel will visit locations not designed for sleeping where homeless people tend to inhabit on a daily basis (1p.m. - 4p.m.).

Sweeps shall be conducted on a weekly basis (4p.m. - 7:00p.m.). Early morning sweeps (5a.m. - 8a.m.) shall be conducted on a quarterly basis or as directed by the Human Services Coordinator.

- b. HAT personnel must have their City identification card visible at all times during street outreach.
- c. HAT personnel will not disturb sleeping persons unless the person is in eminent danger (i.e. weather conditions, fire, etc.)
- d. Morning and evening sweeps shall be conducted with not less than three staff members present. In the event of staff shortage, outreach is to be conducted in areas deemed to be safe/secure (i.e. parks, greenways, etc). Daytime outreach must be conducted in pairs where applicable.
- e. Outreach should be conducted in all areas of the city to assure geographic balance. Outreach will be conducted in other jurisdictions when requested.
- f. On Sweep day (long day) the intake worker will work a 12-hour shift with a one hour lunch break. Intake worker and other staff will receive (2) 15-minute breaks. On Friday of the same week, the intake worker should leave work by 3pm for the 11-7 shift.

21. Payroll Procedures

- a. Payroll must be completed by HAT personnel on-line prior to payroll cut-off.
- b. Per HUD regulations, all HAT staff must complete paper time sheets to be kept on file in my office.

22. Prescription Medications

- a. Client assistance funds can be used to purchase prescription medications with a valid VOH. New clients are required to have a 3-day VOH prior to services being rendered. Case managers should follow procedures for assisting clients to obtain necessary prescriptions.



- b. Prescriptions will not be processed for intoxicated clients. Intoxicated clients should be informed to return later. Document the reason for waiting to provide assistance. HAT workers are prohibited from “holding” the prescription pending sobriety.
- c. Call the Valley View or Wonder Drug (least expensive) pharmacy identifying yourself (name, HAT).
- d. Give the pharmacist the information on the prescription.
- e. Obtain the estimated cost from the pharmacist and find out if the drug is in stock. Tell them that you are sending someone to their office.
- f. Complete a “Prescription Form” and have signed by another staff member if less than \$100. Amounts greater than \$100 must be approved by the Human Services Coordinator.
- g. Make two copies of the prescription and form. The original prescription and HAT prescription form are given to the client. One copy of this documentation goes to the HAT secretary and one copy in the client’s file.
- h. It is not the position of HAT case managers to question the necessity of the drug and thus refuse service.
- i. **At no time shall over the counter medications be dispensed to clients.**
- j. A client may receive non-narcotic Rx assistance with valid Rx only once every 30 days. Maintenance medications are not permitted.
- k. Staff shall contact the department manager if there are questions surrounding prescription medications.

23. Professional Conduct

- a. HAT case managers are not permitted to diagnose client illnesses.

24. Public Appearances (Presentations)

- a. Occasionally, HAT employees are invited to speak to organizations, congregational meetings, and other events. Keeping the community well informed about the plight of the homeless is important. All requests for presentations shall be directed to the Human Services Coordinator and honored in a timely fashion.
- b. Formal presentations which have been scheduled by HAT staff will be consistent to all groups.
- c. HAT staff shall wear HAT approved uniforms when conducting community presentations.

25. Religious Activities

- a. All religious activities shall be prohibited during HAT operating hours.

26. Rent Deposits

- a. Client assistance funds may be used to pay rental deposits (up to \$200 depending upon availability of program funds).
- b. Use of HAT funds for deposit payment requires that a rental inspection of the property be conducted by City inspectors or Housing Authority when appropriate. Contact Building Inspections to request and schedule an inspection if HAT funds are to be used. Information on most recent inspections can also be found on the City's website. The inspection must have occurred in the last three years.

27. Reporting of Suspicious Activity (during sweep or during office hours)

- a. Suspected or observed incidents of child abuse or neglect must be reported to the Department of Social Services.
- b. Identification of weapons in clients' possession shall be reported to the Human Services Coordinator as well as your team members.

- c. Criminal acts in progress must be reported to local law enforcement. Past criminal acts are protected under the laws of confidentiality.
- d. “Duty to warn” – if a client reports they are going to harm someone, this must be reported to the police department as well as the intended victim. The incident shall be reported to the Department Manager for proper notification of appropriate parties.
- e. Clients under the age of 18 must be reported to child protective services unless verification of emancipation can be obtained.
- f. When HAT staff places a 9-1-1 call, the Human Services Coordinator shall be immediately notified. If the Human Services Coordinator is out of the office (vacation/training), the Director of Social Services shall be notified.

28. Reporting to Work

- a. The hours of operation for HAT employees are from 8:00 a.m. until 5:00 p.m. Monday through Friday.
- b. Arriving late for work will not be tolerated. Failure to report to work at scheduled time will result in disciplinary action.
- c. In the event you cannot report to work as scheduled, the Human Services Coordinator must be notified. Please call directly and do not leave a voice mail the office. Voice mail notification is acceptable for the desk of the HAT Secretary.
- d. In case of inclement weather, the City of Roanoke is open for business unless otherwise directed by the City Manager. If an employee has problems getting to work because of weather or needs to leave work prior to the end of a shift, the employee must contact the supervisor. Approved time off due to weather is charged against earned leave. (Refer to Roanoke City Administrative Procedure #2.17)

29. Safety Issues

- a. HAT personnel must inform another HAT staff member of their field location and expected time of return when they are outside of the office as indicated in sign-out policy.
- b. The field location must be designated in writing on the daily outreach notification form. Cell phones must be **charged** and **on** when in the field.
- c. HAT personnel shall conduct field work in teams of two or more persons. Exceptions will be granted in the event that personnel are visiting shelters, offices, and local hospitals, the library and visible city market areas. HAT personnel must never go alone in other locations for safety reasons.
- d. Personnel are responsible for their personal safety and should not take unnecessary risks on the job.
- e. If any staff member feels an intake is becoming out of hand, that person shall call another staff and ask for **MORE PENCILS**. This will signal that assistance is needed with the intake.
- f. At no time will HAT staff close their office doors with clients unless another staff member or staff from another agency is present. **Under this circumstance only**, if the need arises, the case manager shall immediately notify the HAT Secretary or another staff member of the need to close their office door.



30. Schedules

- a. Case managers must adhere to posted monthly and daily schedules.
 - i. Primary intake workers are identified on the schedule. The primary intake worker must remain in the office at all times.
 - ii. The staff member on outreach is responsible for checking and responding to voice mail messages. In the absence of

the secretary, voice mail shall be checked every hour including afternoon outreach and sweeps.

31. Section 8 Rental Assistance Vouchers

- a. HAT personnel can assist the client until they have Section 8 housing as long as the person was homeless and eligible prior to receiving the voucher. Eligibility is based on homelessness and the lack of housing.
- b. If you have questions regarding eligibility, please consult with the HAT Secretary or the Human Services Coordinator.

32. Severe Weather and/or Crisis Situation

- a. In the event of impending or occurring severe weather which may threaten the health or safety of homeless persons, HAT employees should respond to requests from the Office of the Human Services Director. ***Such job duties may not be explicitly described in the job description but are expected at times of crisis and national, state, or local state of emergency.***

33. Shelter Plus Care Referrals

- a. HAT personnel will be the point of contact for many potential Shelter Plus Care clients. *HAT personnel are required to read the Shelter Plus Care manual and become knowledgeable about program guidelines.* A copy is available from the Human Services Coordinator. While your responsibility ends with the referral, agencies may have questions regarding the program. Prior to referral to one of the partner agencies, initial assessment of the client should include the following:
 - i. Verification of Homelessness
 - ii. Disability Verification
 - iii. Income Verification
- b. HAT personnel should contact the partner agency and tell them that they have a potential client for consideration by that agency. Remember that it is the agency's prerogative to accept or reject the

potential client. ***Staff should be careful not to appear too directive in their approach to the agency.***

- c. HAT staff should **never** tell a client that they are eligible for SPC as it is the determination of the partner agency.
- d. Please verify participating agencies with the Human Services Coordinator.
- e. Supportive Service Logs must be completed for every SPC client starting on the day that they are accepted by the screening committee and deemed eligible. Logs are required to be submitted monthly to the city's Human Services Coordinator.

34. Solicitations

- a. Absolutely no solicitations may be conducted on behalf of the Roanoke City Homeless Assistance Team.

35. Staff Case Management Meetings

- a. All HAT personnel are required to attend staff meetings to discuss operations, cases, share information and resources.



36. Transports

- a. Transportation can be provided to clients with current files upon confirmation of appointment and presentation of a valid VOH. At no time shall HAT clients be transported in employee personal vehicles. Eligible transports may include:
 - i. Doctor's appointment, employment, housing, shelter, (upon consultation with Human Services). See Section 2 of this manual for other approved transports/bus passes.
- b. With proper medical documentation, persons with disabilities may be transported to social services and other appointments as approved by the Human Services Coordinator. (This may include a mental, physical or reading disability.) In extreme cases where

there are visible signs of discomfort, Case Managers may make the decision to have individuals transported.

- c. The City of Roanoke is committed to providing access to services regardless of physical ability. Staff will make reasonable efforts to accommodate individuals with disabilities. If an accommodation is needed, the request should be made at least two days in advance so that staff has time to make appropriate arrangements. Staff should contact Valley Metro Star program to arrange transports.
- d. In the absence of the HAT Transporter, the staff person assigned to **outreach** will conduct transports, the back up person will do outreach in the event the team member on intake does not need assistance.



37. Transitioning Clients

- a. “Transitioned clients” refers to those clients who have secured permanent housing. According to federal regulations, HAT staff are only allowed to work with currently homeless persons and to provide assistance to them to secure permanent housing. HAT may assist clients in securing basic household items necessary to establish housing before the client moves in and for up to two weeks after placement in permanent housing. See Client Assistance Expenditures (Section 12) for procedures.
- b. Upon obtaining housing, clients are no longer eligible for case management services rendered by HAT staff. Ongoing case management must be pre-arranged with another human service agency. All contacts must be documented in the client’s file. No client assistance funds may be utilized for clients once they become housed.
- c. “Welcome Home Baskets” containing household items can be provided to active clients transitioning into permanent housing. HAT personnel should exercise caution when discussing this service with clients so that realistic expectations will be maintained.
- d. The Case Manager coordinates basket distribution. Once a security deposit is requested or a client states that they have located

housing and provides a permanent address, a welcome home basket may be provided.

38. Vacation Requests

- a. It is the responsibility of the Human Services Coordinator to approve all scheduled leave.
- b. Whenever possible, at least a one-week notice shall be given for requested time off.

39. Van Usage

- a. Extreme caution shall be exercised when utilizing city vehicles. Reckless usage of these vehicles will result in immediate disciplinary action. Refer to City POP #27 regarding use of city equipment for private purposes.

40. Verification of Homelessness (VOH)

- a. All clients must be verifiably homeless. Homelessness is defined as an individual or family residing in an emergency shelter or in accommodations not designed for sleeping such as in vacant houses, vehicles, and under bridges.
- b. Documentation of homelessness is **required** for every case file. This written confirmation must be on professional letterhead with a copy being placed in client file. If written verification is not readily available **ask the client to use the phone** at the front office to call the shelter and have the agency fax a copy to our office. Due to time limitations, HAT staff are not to place this call for the client.
- c. Verification for people residing in accommodations not designed for sleeping can be visually verified during outreach. Case managers must document location, date, and time the individual was seen sleeping in such accommodations.
- d. Do not accept verification of homelessness from personal sources such as friends and family.

41. Violation of HAT Standard Operating Procedures

- a. Violation of stated policy and procedures by HAT employees may result in disciplinary action up to and including termination of employment.

Initial Client Contact / Intake Process

- 1. Welcome client to HAT.**
 - 2. Verify homelessness and explain process of providing services.**
 - 3. Explain HMIS Forms.**
 - 4. Provide client with overview of HAT program.**
 - 5. Complete HMIS, Intake and Individual Service Plan (update upon revisits).**
 - 6. Review all data collected and ensure that all forms are signed and/or initialed by client in appropriate locations.**
 - 7. Assemble client file and document case notes.**
 - 8. Provide HAT Secretary with client file.**
- NOTE: The complete intake process should take no more than 30 minutes.**

Key Roles and Responsibilities of HAT Staff

Duties as performed by HAT Secretary

1. Screens phone calls and provide information about services, greets and signs in clients provide consent forms to new clients.
2. Prepare Annual Progress Report (APR) to HUD.
3. Monitors all expenditures and enters data on a daily basis.
4. Prints and reconciles all financial reports from the Finance Department.
5. Monitors bus pass log and distributes bus passes.
6. Monitors MasterCard expenditures, validates on-line and reconciles statements on a monthly basis.
7. Receives, reconciles, and submits invoices for payment.
8. Prepares requests for birth certificates and photo ID cards, security deposits, etc.
9. Maintains spreadsheet of clients who have died; checks obituaries daily.
10. Creates and schedules monthly intake calendar and distributes to staff.
11. Monitors contributions and composes letters to contributors.
12. Purchases supplies and equipment, arranging for equipment maintenance as needed.
13. Maintains all files for HAT including correspondence, minutes from staff meetings, payment vouchers and other financial records, grant proposals, and annual progress reports.
14. Reviews and checks new intake files and closed case management files for accuracy and adherence to HUD guidelines.
15. Maintains supply of forms and develops new forms as needed.
16. Takes and transcribes staff meeting minutes.
17. Receives and distributes mail.

Duties as performed by HAT Case Aide

1. Case Aide provides client with returning bus pass (verify VOH).
2. Ensures doors are locked, wipers off, and windows closed on van.
3. Signs odometer reading on mileage form in van.
4. Always carry driver's license, ID Badge and cell phone.
5. Sign out on outreach sign out sheet destination and time leaving.
6. Check tires, around/behind van before driving.
7. Put seat belt on; adjust mirrors.
8. Always blow horn twice before pulling/backing out.
9. Drive van to front side of HAT building and pick up client.
10. Inform client that they must never sit in the front seat (City Policy).
11. Have client buckle seat belt and verify destination.
12. Sign time back in on outreach sign out sheet, and initial.
13. **Always** place key back into box.

Duties as performed by HAT Case Manager

INTAKE

1. Sign client in and out at front desk.
2. Responsible for conducting intakes from 8a.m. to 12p.m., which entails:
 - a. Screening each new intake to determine if they are eligible to receive our services by verifying homelessness
 - b. assessing the extent and type of need for each client
 - c. ensuring that all documents that require a signature are signed
 - d. gathering and copying forms of ID's
 - e. request permission to take photo if identification is not available
 - f. assembling a service plan
 - g. completing the supplemental page of client intake
 - h. writing the initial notes (intake notes) and assembling the file.
3. See existing clients and offer services at their request.
4. At end of day, Case Manager on intake is required to make sure that file cabinets are locked prior to leaving for the day.
5. Making referrals to service providers to meet the client's needs.
6. Verifying client's appointments and scheduling transports. Make sure you leave at least 15 minutes between transports. List complete address, name of company and directions if necessary.
7. Updating client files w/new information and/or services.
8. On-site verification of homelessness for those staying outside.
9. As time allows, close files which are no longer active those who are housed.
10. Entering client information on the following logs:
 - a. Weekly report (track services, new/re-open and closed, weekly cost log)
 - b. Annual Progress Report log
 - c. Street Outreach Report – completed by noon on Thursday.
11. Maintain log of all long distance calls and faxes.
12. At the end of the intake, case manager shall escort client to waiting area.

NOTE: During interview process, only spouse and/or children will participate in interview with the exception of case managers or sponsors from other agencies.

BACKUP

1. Assist the Case Manager on intake from 8a.m. until 9:00a.m.
2. Case manager may use this time to complete paperwork if needed.
3. Close files which are no longer active or closing files of those who are housed.
4. If the front area is not busy (2 or more new intakes or 4 or more clients waiting) backup person shall conduct street outreach beginning at 9:00 a.m.
5. In the absence of the HAT Case Aide, it is the responsibility of the case manager on **outreach** up to conduct transports.
6. It is the responsibility of the backup to assist with DMV transports.

OUTREACH

1. Morning outreach should begin promptly at 9:00 a.m. and end at 11:30 a.m.
2. The HAT voicemail shall be monitored hourly during afternoon outreach. Return phone messages as indicated by voice mail.
3. Conduct morning/afternoon outreach and gathering numbers of individuals observed, contacted and referrals made.
4. Perform intakes in the field for those who are unable to come to the HAT office.
5. Respond to citizen and/or business request for assistance.
6. HAT staff will not use outreach time to conduct personal business or eat breakfast/lunch.
7. During outreach, HAT staff will not provide money or cigarettes to a homeless person.

8. HAT staff should not awaken sleeping individuals in park/streets.
9. During afternoon outreach, it is the responsibility of the case manager on outreach to drive the HAT vehicle and determine daily outreach schedule.
10. Case managers will visit shelters, parks, libraries, bus stations, public buildings and parking garages as well as alleys, under bridges and other known locations.
11. In the event of a medical emergency, staff shall call 9-1-1 directly. At no time should staff transport medical emergencies. The Director shall be contacted immediately.
12. Perform on site verification of homelessness for those staying outside, in vehicles or tents, etc.
13. It is the responsibility of the outreach case manager to sign the vehicle in and out at the start of afternoon outreach and also fuel the vehicle when the gas gauge reads 1/4 of a tank. Outreach case manager shall also ensure that inside of vehicle is clean and free of trash/debris.
14. Upon return to HAT office, outreach staff should enter all statistical data on weekly reports.

While certainly not inclusive, the above is intended to be used as a guide for staff in performing day-to-day duties. If you should have any questions regarding policy, please contact your Director immediately.



The City of Roanoke
Homeless Assistance Team Policies and Procedures

I _____ have read and understand the City of Roanoke Homeless Assistance Team Policy and Procedures which governs acceptable day-to-day program operations. I hereby agree to fully abide by its provisions. I further understand that if I violate any of these provisions, I will be subject to disciplinary action, which may include termination from my employment with the City.

Signature of Employee

Date