How to Review Rent Assistance Referrals

1) **Upon receipt of referral email, open the participant's Rent Assistance record in ITrac.**

2) **Look for these three required items: Prosperity Budget, Signed Rent Assistance Application, Career Plan. All must be current or completed within the last three months.**
   - ✓ Open the blue Prosperity Budget Tab.
   - ✓ Click on the Customer Documents Menu in the upper right corner of the Rent Assistance Record to check for a signed application.
   - ✓ If the application there is unsigned, open the green Customer Documentation Tab. Coaches can upload a printed and signed application here, as well as the career plan.
   - ✓ Remember, career plans are called 'individual plans' in iTrac.

3) **Return to the Rent Assistance record, and review the Registration Tab.**
   - ✓ Consider the details entered by the referring coach. Is this participant a good candidate for rent assistance? If not enrolled in AHFE, complete Population A/B Determination Form and AHFE Eligibility Screening Checklist.
   - ✓ Is the service selected by the referring coach correct? Rapid Rehousing is for participants currently experiencing homelessness or fleeing domestic violence. Homelessness Prevention helps participants stay housed.

4) **Decide to accept or return the referral.**
   - ✓ The participant must have a recent Prosperity Budget and Career Plan, as well as a signed rent assistance application to be accepted.
   - ✓ If accepting, complete the *Review Date* and *Reviewed By* fields on the Registration Tab. Then, go to the Services Tab and enter the first hub service of either Rapid Rehousing or Homelessness Prevention. Complete your agency's paperwork.
   - ✓ If not accepting the referral, add a note stating the reason why to the Registration Tab. Then, go to the Outcomes Tab and enter a *Pre-Program Exit* in the Program Status Control.

5) **Email coach your decision to accept or return the referral.**
   - ✓ If accepting, remind coach to copy their first service. You cannot pay rent until the coach copies a service to the rent assistance record.
   - ✓ If returning, tell the coach the reason why.

6) **Complete hub intake, and start helping participant. Keep coach informed.**
   - ✓ Enter your *Rent Assistance Payment and Services Plan* on the Payment Tab.
   - ✓ Enter a service on the Services Tab each time you meet with the participant.

7) **Before paying rent each month, check Services Tab for coach's monthly service.**
   - ✓ Hubs cannot pay rent without a monthly service!
   - ✓ Enter a payment on the Payments Tab each time you pay the rent or a housing-related cost.

How to Exit Rent Assistance Participants

1) **When you are finished paying rent for a participant, you must exit the participant from the Rent Assistance record.**

2) **Open the participant's Rent Assistance record in ITrac.**

3) **Click on the Services Tab.**
   - ✓ Enter a *Hub Final Rent Exit* service in the Services Control.
   - ✓ The date is the last day of the last month you paid rent. Use the same date for the start date and the end date.

4) **Go to the Payments Tab.**
   - ✓ Update the following fields in the Rent Assistance Payment and Services Plan Control:
     - End Date
     - Payment Type – Confirm all payment types you made are checked.
     - Housing Status at Funding End

5) **Click on the Outcomes Tab.**
   - ✓ Add an *Exit* Program Status in the Program Status Control. The date is the last day of the last month you paid rent.
   - ✓ Add an *At Exit* Rent Assistance Outcome in the Rent Assistance Outcomes Control. The date is the last day of the last month you paid rent. Select the appropriate Housing Status.

6) **Congrats! Your Participant is now exited.**

IN 6 MONTHS, AND AGAIN IN 12 MONTHS, DETERMINE IF PARTICIPANT IS STILL HOUSED.

- ✓ Add an *At 6 Months* or *At 12 Months* Program Status in the Program Status Control on the Outcomes Tab. The date is the date 6 months or 12 months after the last day of the last month you paid rent.
- ✓ Do not enter retention data if participant was not housed at exit.

QUESTIONS? CONTACT

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