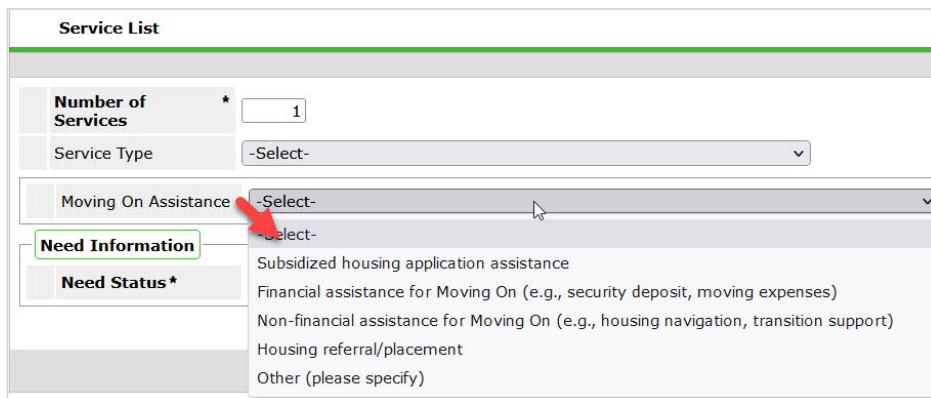


PSH Moving On Service Transaction Resource Guide

Element C2 – Moving On Assistance

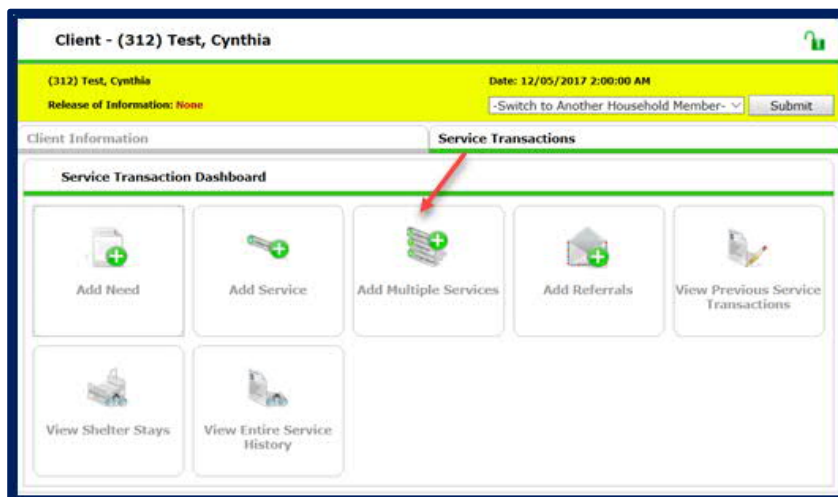
With the implementation of the 2022 Data standards, all HUD CoC – Permanent Supportive Housing Projects are now required to record Moving On Assistance, when provided. This assistance is recorded as a Service Transaction and must be collected on the Head of Household at the point of Occurrence.



The screenshot shows a 'Service List' form. The 'Number of Services' field is set to 1. The 'Service Type' dropdown is set to '-Select-'. The 'Moving On Assistance' dropdown is open, showing a list of options: '-Select-', 'Subsidized housing application assistance', 'Financial assistance for Moving On (e.g., security deposit, moving expenses)', 'Non-financial assistance for Moving On (e.g., housing navigation, transition support)', 'Housing referral/placement', and 'Other (please specify)'. A red arrow points to the 'Moving On Assistance' dropdown.

Adding the Moving On Assistance Service Need Transaction

1. EDA (Enter Data As) into your appropriate PSH program bin, if not already defaulted to that provider bin.
2. Select backdate mode, if not entering data in real time.
3. Locate the Head of Household record
4. Select the Add Multiple Services icon from the options displayed on the Service Transactions dashboard.



The screenshot shows the 'Service Transaction Dashboard' for Client - (312) Test, Cynthia. The dashboard includes a header with client information and a date of 12/05/2017 2:00:00 AM. Below the header, there are two tabs: 'Client Information' and 'Service Transactions'. The 'Service Transactions' tab is active, showing a dashboard with several icons: 'Add Need', 'Add Service', 'Add Multiple Services', 'Add Referrals', 'View Previous Service Transactions', 'View Shelter Stays', and 'View Entire Service History'. A red arrow points to the 'Add Multiple Services' icon.

- a. Ensure the Service Provider is correctly displayed.
- b. Establish the start and end date for the service.
 - i. Start Date = the date the service is provided (if not already set in backdate mode).
 - ii. End Date = the start date.
- c. Leave the Number of Services set to 1.

The screenshot shows a web form titled "Multiple Services". At the top, there is a warning icon and text: "Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered." Below this, the "Service Provider*" field is set to "CCSS - Detroit CoC - PSH". The "Start Date*" and "End Date" fields are both set to "03 / 08 / 2022". The "Number of Services" field is set to "1". The "Service Type*" field is set to "Moving On Assistance". A dropdown menu for "Apply Funds for Se" is open, showing options: "Subsidized housing application assistance", "Financial assistance for Moving On (e.g., security deposit, moving expenses)", "Non-financial assistance for Moving On (e.g., housing navigation, transition support)", "Housing referral/placement", and "Other (please specify)".

- d. Select the appropriate Moving on Assistance type provided from the dropdown list of options.
 - i. Prior to waitlist
 - Subsidized housing application assistance
 - ii. Once Pulled –
 - Financial assistance for Moving On (e.g., security deposit, moving expenses)
 - Non-financial assistance for Moving On (e.g., housing navigation, transition support)
 - Housing referral/placement

5. Navigate to the Need Information section.

The screenshot shows the "Need Information" section of the form. It contains three dropdown menus: "Need Status*" is set to "Service Completed", "Outcome of Need" is set to "Fully Met", and "If Need is Not Met, Reason" is set to "-Select-".

- a. Select Service Completed from the Need Status dropdown list of options.
- b. Select Fully Met from the Outcome of Need dropdown list of options.

- Click Save & Exit once the service has been added.

Note: If the service type is not listed as basic needs or if you receive a “Service Type” error message when trying to save the service, please contact the helpdesk.

- Click Back to Dashboard to view the main Service Transaction screen.

Addressing Case Plans & Case Notes

- Navigate to the Client Information Tab.
- Select the Case Plans tab to add client Goals and Case Plan documents.
- Click the Add Goal button.
 - Ensure at a minimum the following required fields are completed.
 - Date Goal was Set.
 - Classification = Housing
 - Type = Apply for Subsidized Housing/section 8
 - Overall Status – In Progress

- Click Add Goal.
- Click Add Case Note to add the initial case notes pertaining to this goal.

Adding Additional Case Notes

To add additional case notes to the existing goal:

- Navigate to the Case Plans tab and click the Notes icon for the Goal.

Goals					
Classification	Type	Date Added	Date Set	Notes	Latest Note Date
Housing	Apply for Subsidized Housing/section 8	03/08/2022	03/08/2022		03/08/2022

Add Goal

Showing 1-1 of 1

- Click the Add Case Note button to open another window for adding the case note.
- Add the Case Note and Save.