Best Practices in HCS Documentation: TSS Extensions

About YOU

In the chat, I'd love to hear who you are and where you work. Can you also share something you are grateful for or something that brought you joy so far this week?

About CSH

CSH collaborates to advance solutions that use housing as a platform for services to improve the lives of the most vulnerable people, maximize public resources and build healthy communities.

CSH

CSH

Learning Objectives for Today

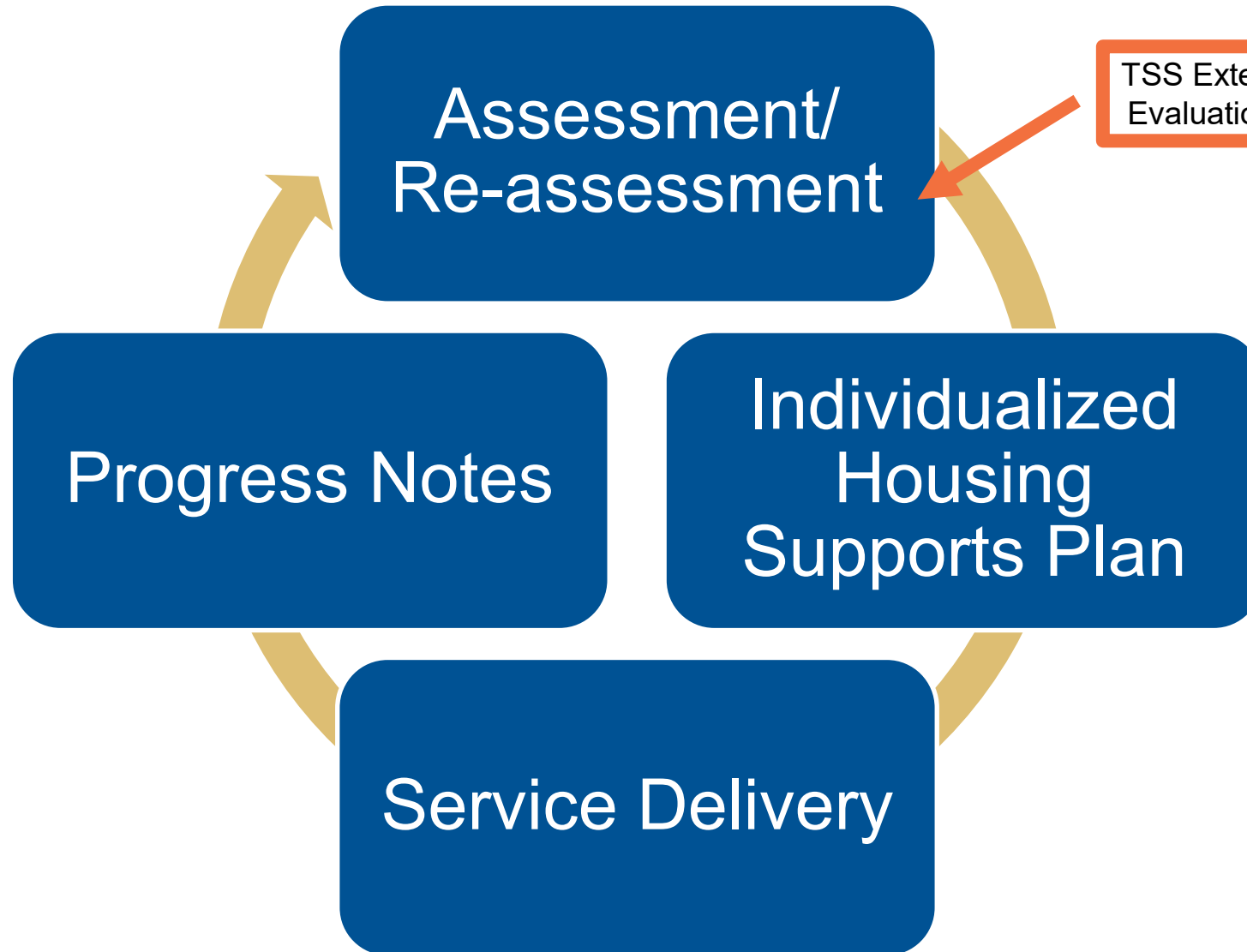|	
Understanding key elements for documentation thread	HTSS Extensions- documentation to ensure approval
Tips for writing goals, interventions and activities	Best practices in internal quality review

Key Concepts in Health Care Documentation of PSH Services

Housing Community Supports- Documentation Thread

Assessment/ Re-assessment

Individualized Housing Supports Plan

Service Delivery

Progress Notes

TSS Extensions (TSS Evaluation Checklist)

✚ *Golden Thread*

An external reviewer must be able to clearly track the thread of need for the services on the evaluation for services into the recommendations from the evaluation, then understand how these are translated into goals and proposed activities for the service staff with the tenant on the housing supports plan and then the proposed activities are finally into actions, tracked in progress notes.

✚ Notes health care practices that may be new to some homeless service providers new to health sector funding

CSH

Who is involved in the documentation process?
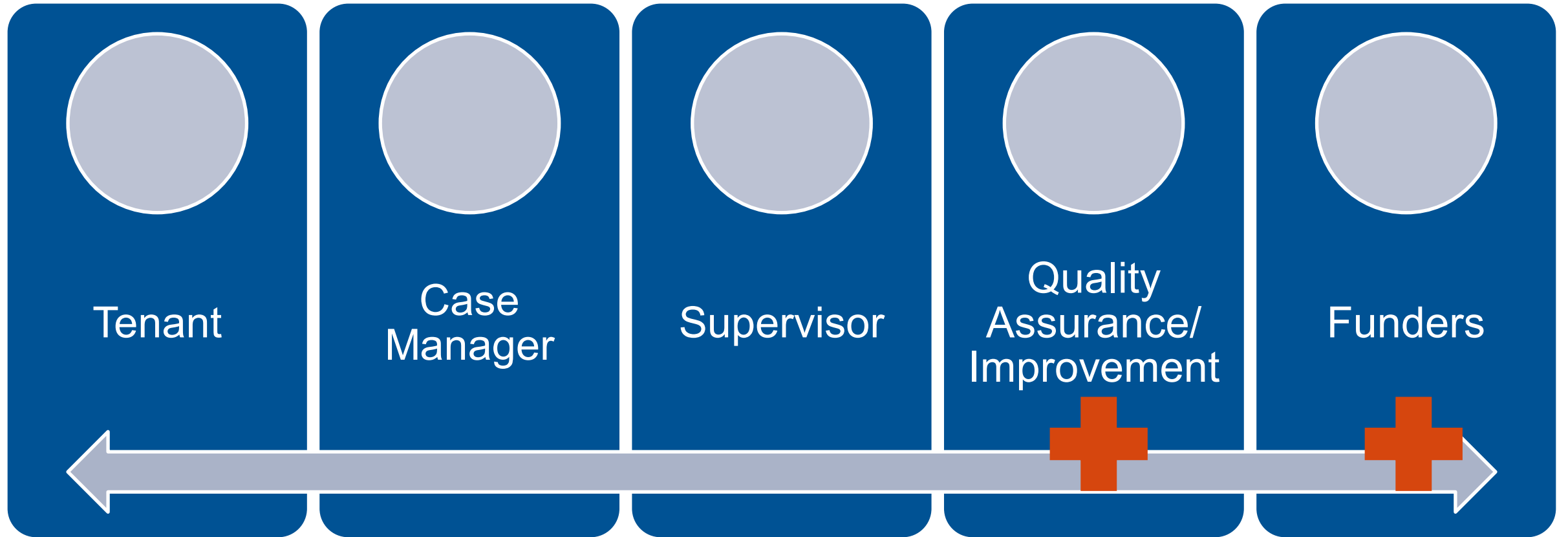
Why TSS Evaluations **Matter**

Continuing authorizations and reimbursement of services, for **all who need them.**

To reauthorize a tenant for services, they must have a **demonstrated need for services- an evaluation is required**
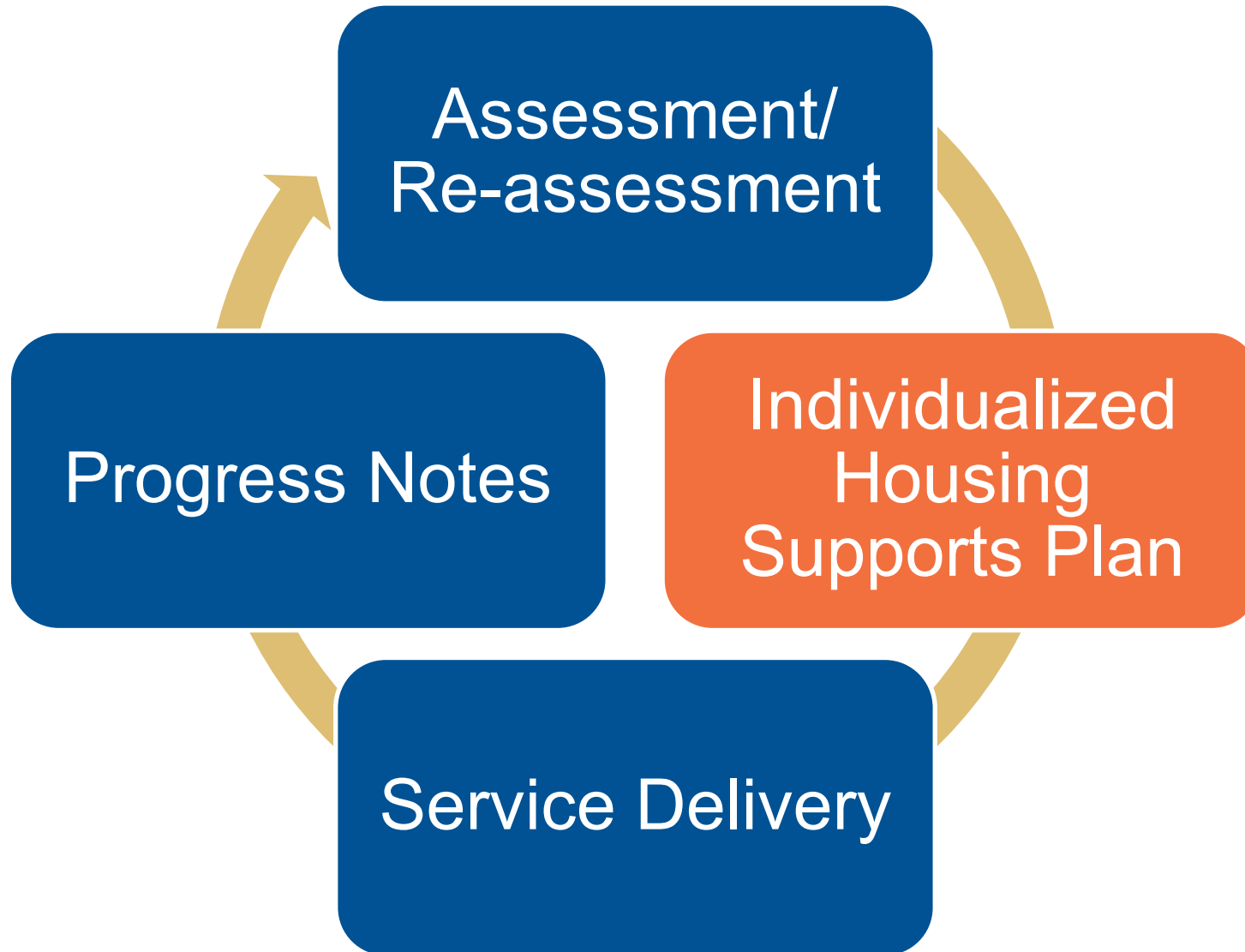

Many PSH tenants need **ongoing, long-term supports, and needs change over time.**

We know that housing stability, trusting community networks and **recovery take time.**

Housing Community Supports- Documentation Thread

Assessment/ Re-assessment → Individualized Housing Supports Plan → Service Delivery → Progress Notes → (cycle)

✚ *Golden Thread*

Individualized, detailed HSP, revised at least every 180 days

✚ Notes health care practices that may be new to some homeless service providers

CSH

Housing Supports Plan

Start and End dates are required- during these dates staff work with tenants to on activities (actions) toward goals.

Housing Community Supports
Service Provider Organization Name

HMIS ID#

Housing Supports Plan

Highlighted – required data elements needed in agency custom Housing Supports Plan

1. HMIS ID #	2. Member Name (First, Middle, Last)

3. MediCal Member ID # (if applicable)	4. HSP START DATE ___/___/___ ☐ Housing Transition & Navigation ☐ Tenancy & Sustaining Services ☐ Housing Deposit **HSP END DATE** ___/___/___ ☐ Housing Transition & Navigation ☐ Tenancy & Sustaining Services ☐ Housing Deposit

NOTE: Any revision dates must occur within the overall HSP authorized START DATE & END DATE from Section 4.
If changes are after this HSP end date, create a new HSP for authorization.

5. **HSP Revision Date** ___/___ includes ☐ Housing Transition & Navigation ☐ Tenancy & Sustaining Services ☐ Housing Deposit

Added Service Activities _____

HSP Revision Date ___/___/___ includes ☐ Housing Transition & Navigation ☐ Tenancy & Sustaining Services ☐ Housing Deposit

Added Service Activities _____

HSP Revision Date ___/___ includes ☐ Housing Transition & Navigation ☐ Tenancy & Sustaining Services ☐ Housing Deposit

Added Service Activities

Goals, Actions & Responsibility

10. Activity Number	11. Identified Barriers	12. Goal (short & long term)	13. Action Steps	14. Person(s) Responsible (Member/Staff)
Example: 6.3 (Assisting in obtaining ID and documentation for SSI)	*No transportation to SSI office; no phone number to get in touch with client to arrange ride to SSI*	*Short term: get SSI set up for member* *Long term: use ID and SSI for rental applications*		✚
Example: 7.10 (Continuing assistance with lease compliance, including ongoing support with activities related to household	*I need help remembering to pay my rent on the day that it is due, sometimes I forget what day it is.*	*Short term: set up a calendar to track when ren is due and hang on fridge* *Long term: Pay rent on time each month for 12*		

NOTE: Responsibilities and action steps are how you show that your services and interventions are needed and how they can be successful. A funder approving services will wonder why the tenant cannot accomplish these goals independently. **What is your role? What proposed actions will you take.**

Supervisor Review

HMIS Data Entry: Enter the contact information below within the client "contact" fields in HMIS.	
16. My Emergency Contact Person is	Name Phone Number Agency (if applicable) Email address
17. My Primary Care Provider is	Name Phone Number Agency (if applicable) Email address
18. My Enhanced Care Management (ECM) Provider is	Name Phone Number Agency (if applicable) Email address

19. SIGNATURES

Member Name   Member Signature   Date

Staff Name   Staff Signature   Date
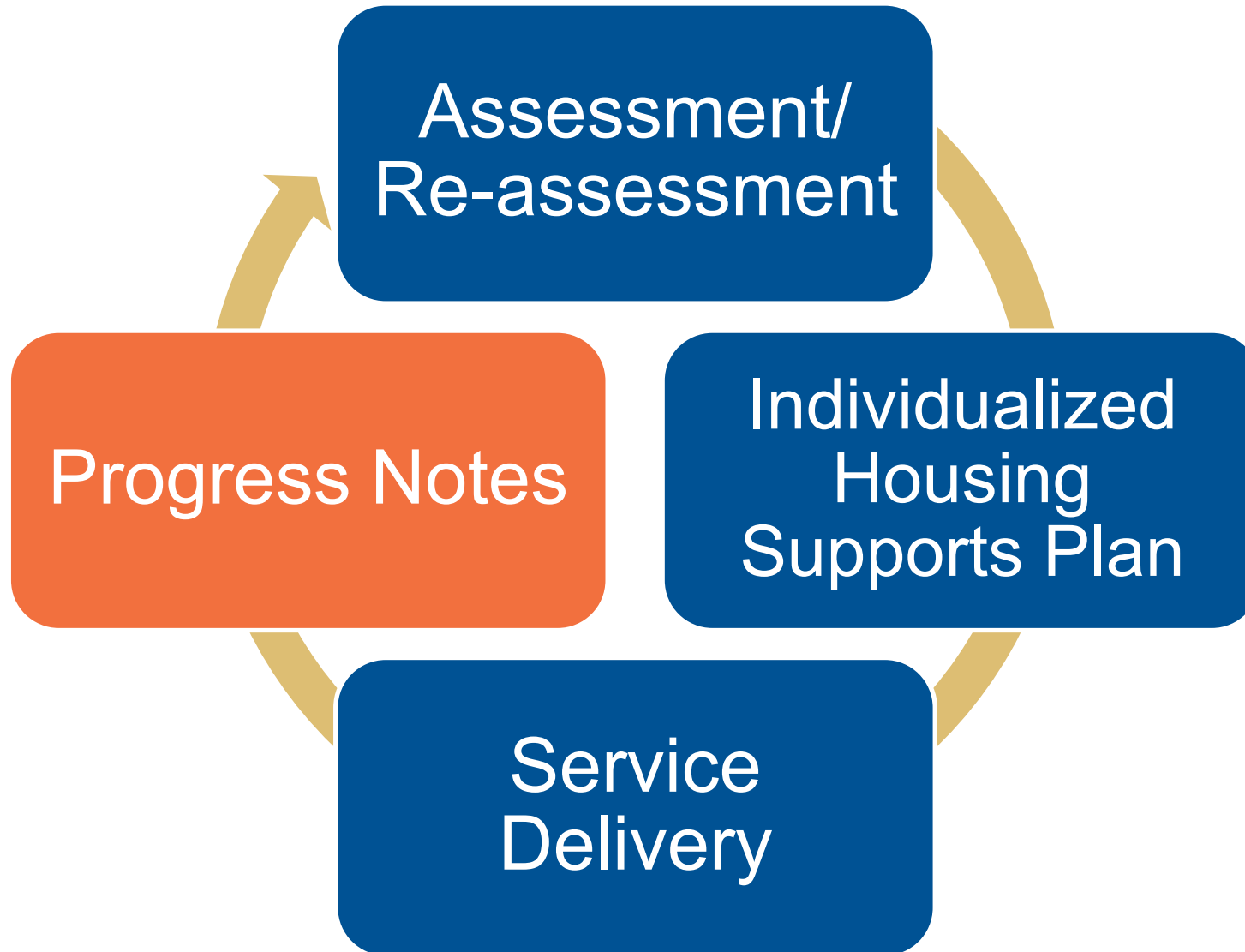
Staff Phone   Staff email

Supervisor Name   Supervisor Signature   Date

Housing Community Supports- Documentation Thread

Golden Thread

Written as soon as possible during or after intervention.

Include date of service, client name, case manager name & location of service

Keep details objective- write assuming a lawyer and/or tenant could access

Include tenant's voice & quotes

Link to the goal your activities help further

Note progress toward goal

List next step(s)

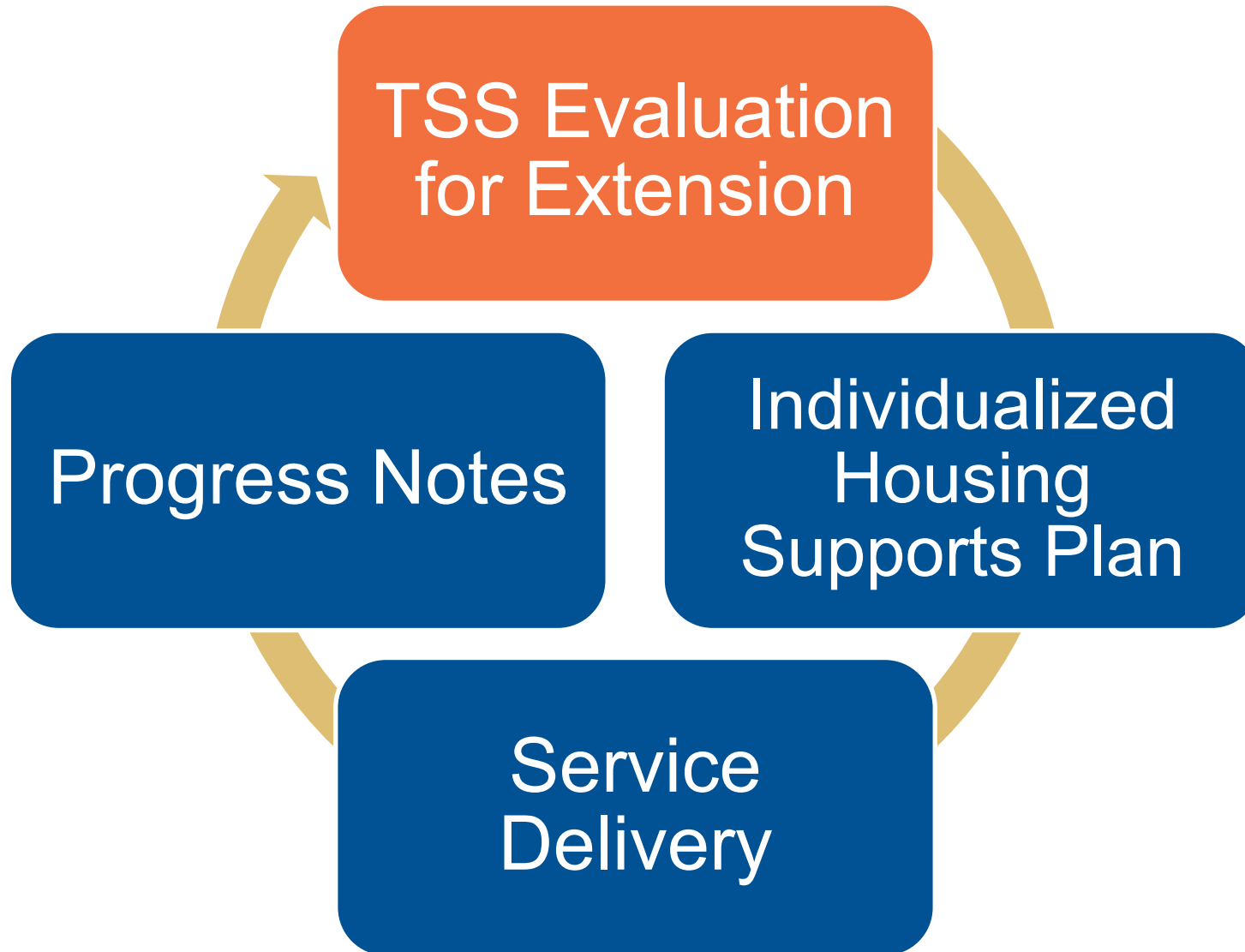Notes health care practices that may be new to some homeless service providers

Housing Community Supports- Documentation Thread

TSS Evaluation for Extension

Individualized Housing Supports Plan

Service Delivery

Progress Notes

Golden Thread

- **All required elements complete**

Notes health care practices that may be new to some homeless service providers new to health sector funding.

CSH

TSS Evaluation Checklist

A case manager will be responsible for completing the evaluation, to the best of their ability. The tenant is not required to be present. For any questions the case manager cannot answer, the tenant and other providers should be consulted.

Components of the PDF Evaluation:

❏ Names and Identifiers

❏ Assessment questions in True/False format of common criteria that support why a tenant may need ongoing service to remain successfully housed

❏ Automatically calculates # of True

❏ Case manager makes final recommendation

❏ All ongoing needs (Criteria marked False) require a service goal and timeline

❏ To be completed every 180 days

Screen Sharing: Example 1

Client Name:

HMIS ID:

Community Supports Evaluation:
Housing Tenancy & Sustaining Services

This evaluation supplements the Housing Support Plan. This supplemental evaluation is <u>required</u> to assess necessity of continued services and must be completed at least every 180 days after initial enrollment in Housing Tenancy and Sustaining Services to justify reauthorization.
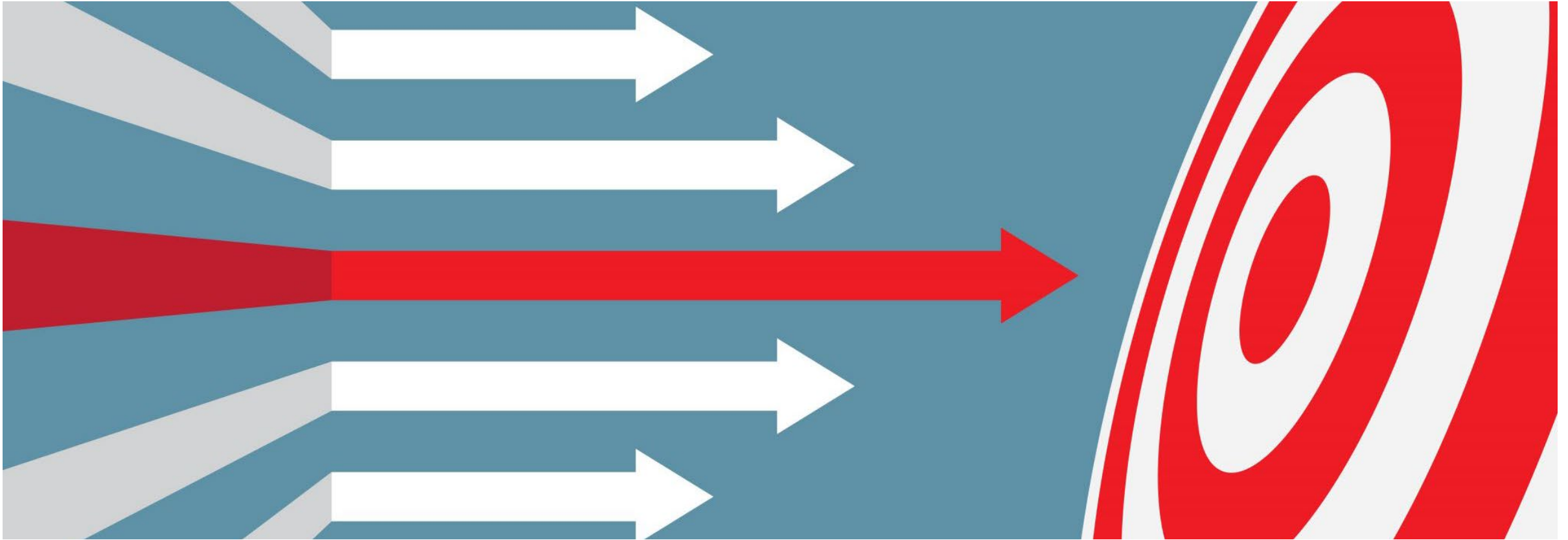
Case Manager: Date of Evaluation:

Service Provider Organization Name:

Criteria	Check if True	Check if False	Comments
Housing Stability			
1. Tenant had NO lease violations in last 12 months.	☐	☐	
2. Tenant/ Rep Payee paid rent on time every month for the last 12 months.	☐	☐	

Goal and intervention

What is your role in helping the client to hit the target? How are you coaching?

Key words in Goal Setting

INCREASE **IMPROVE** **DECREASE** **REDUCE** **BUILD**

GROW **MINIMIZE** **ACHIEVE** **REMAIN**

CSH

Actions = Interventions

Key words for Interventions

PROVIDE EDUCATION	MODEL BEHAVIOR	ASSESS FOR RISKS	IDENTIFY STRENGTHS	REFER FOR SERVICES	COMPLETE
DESIGNATE	SHARE	HELP TENANT…	NORMALIZE	EXPRESS…	DIRECT/REDIRECT
REDEFINE	UTILIZE MOTIVATIONAL INTERVIEWING TO ENGAGE TENANT IN DISCOVERING…	IDENTIFY THEMES/TRIGGERS	DEMONSTRATE	EVALUATE	DEVELOP
	FACILITATE	TEACH	ROLE PLAY	ADVOCATE FOR	ASSIST WITH

CSH

Home   Tools   **Document**   1 / 5   128%   Sign In

Client Name:

HMIS ID:

Community Supports Evaluation:
Housing Tenancy & Sustaining Services

This evaluation supplements the Housing Support Plan. This supplemental evaluation is <u>required</u> to assess necessity of continued services and must be completed at least every 180 days after initial enrollment in Housing Tenancy and Sustaining Services to justify reauthorization.

Case Manager: Date of Evaluation:

Service Provider Organization Name:

Criteria	Check if True	Check if False	Comments
Housing Stability			
1. Tenant had NO lease violations in last 12 months.	☐	☐	
2. Tenant/ Rep Payee paid rent on time every month for the last 12 months.	☐	☐	

What will new case managers need?

- To access past progress notes and documentation

- to understand tenants' needs, preferences, motivation, values

- extra time & coaching to complete forms

What can supervisors do to support?

CSH

Supervision & Support for Success

- Review HSP during case conferencing in supervision

- Prep staff for upcoming TSS Extensions and schedule reviews of TSS Evaluations for extension of services prior to submitting

- Ask staff about and assess the time it takes for completing documentation- is there opportunity for efficiency?

- Staff training in documentation at onboarding and quarterly for those with need for quality improvement

- Staff 1:1 coaching and feedback from staff on how to simplify documentation and clarify what is needed

- Write supervision notes that are shared with staff to access and track development goals.

- When possible, add in **FUN**

CSH

Internal Monitoring and Quality Reviews

Conduct reviews of agency charts & quality of care

This is proactive and done regularly

Have a plan for how internal audits are conducted

Include frequency and follow up

Re-evaluate this plan regularly

Identify areas at risk for external audits

Learn from other agencies in your network

When risk areas are found, determine the appropriate corrective action plan- including updating policies, procedures, staff training and supervision

Quality and Compliance requires regular review & ongoing learning support

Continuous Quality Improvement

Written Policies, Standards & Agency Procedures

Staff Training & Supervision

Internal & External Audits

Corrective Action Planning

Learning & Improving

Screen Sharing: Example 3

Client Name:

HMIS ID:

Community Supports Evaluation:
Housing Tenancy & Sustaining Services

This evaluation supplements the Housing Support Plan. This supplemental evaluation is required to assess necessity of continued services and must be completed at least every 180 days after initial enrollment in Housing Tenancy and Sustaining Services to justify reauthorization.

Case Manager: Date of Evaluation:

Service Provider Organization Name:

Criteria	Check if True	Check if False	Comments
Housing Stability			
1. Tenant had NO lease violations in last 12 months.	☐	☐	
2. Tenant/ Rep Payee paid rent on time every month for the last 12 months.	☐	☐	

Client & Staff Centered Quality Improvement

Managing risk, ensuring services aren't disrupted, supporting staff & centering tenants in all

Questions?

Thank you!

csh.org