Maryland Partnership
for Affordable Housing

THE 811 PROJECT RENTAL ASSISTANCE PROGRAM
A Training Guide for Case Managers Working with Non-elderly Persons with Disabilities

Funding provided by the U.S. Department of Health and Human Services, Centers for Medicare and Medicaid, Real Systems Change Grant for Building Sustainable Partnerships for Housing.

The Maryland Partnership for Affordable Housing

Ten years ago a dedicated group of human service professionals committed to helping persons with complex health and social needs live inclusive, productive and stable lives in the community began to realize that many of the folks they were serving, regardless of disability status or medical diagnosis or life experience, faced a common challenge—finding a safe, decent, and **affordable** home. Stepping back and looking over the last ten years, this small consortium of cross-disability and cross-sector service professionals has evolved into an effective, system-wide, long-standing stakeholder group creating affordable housing opportunities for persons with significant disabilities and extremely low incomes, The Maryland Partnership for Affordable Housing.

What began as a simple collaboration—a shared effort to understand what "affordable" housing really meant and to find answers to why an available supply of decent housing for persons with incomes supported by Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) did not seem to exist, precipitated an expedition into the complicated world of housing jargon, processes, and regulations, and often closed doors or long waiting lines. The collaboration grew into the community, embracing local housing providers, initiating local strategies or efforts, and picking up local champions—persons who understood both sides of the story, who understood capacities and constraints of housing providers and service providers, but knew that the two systems shared a common vision—to provide safe, decent and affordable housing for those with complex needs. What evolved next was a contributory partnership movement, a leveraging of new resources, outside of the mainstream system, and involving wider and deeper commitments from State systems—assurances ranging from financial guarantees to a pledge to better understand what community integration truly means for persons with significant disabilities and extremely low incomes.

In real terms, this evolutionary process has created over 600 integrated and affordable housing opportunities for persons with disabilities with extremely low incomes and with access to supports and services to enable them to live independently in the community. Ranging from a Bridge Subsidy Program to a targeted non-elderly disabled (NED) housing choice voucher program to a philanthropically funded housing program to set asides, preferences, and pilot programs and including initiatives to cross-train service providers and housing providers, the housing challenges faced by Maryland's most vulnerable citizens is recognized.

The Maryland Partnership for Affordable Housing (MPAH) is an embodiment of a ten year human services and housing partnership that has matured into a forum where human service providers and housing providers have meaningful and productive conversations about deep rental subsidies, voluntary supportive services, tenant based housing vs. project based housing, reasonable accommodations, and Medicaid funded waivers. The partnership is strong, supported by tackling common issues, sharing best practices, respecting the work of all stakeholders, and relying on the respective strengths of each organization, player and leader.

Today, the MPAH envisions that people with disabilities receiving Medicaid funded services and supports will be able to acquire housing that is affordable based on SSI income levels. This vision is realized through the acquisition and implementation of the U.S. Department of Housing and Urban Development 811 PRA program, providing 150 integrated and affordable rental opportunities in vibrant and choice neighborhoods.

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Purpose of the Training Guide

The purpose of the ***811 PRA Project Rental Assistance Training Guide*** is to provide a road map for service delivery systems, case manager supervisors, and ground-level case managers to assist persons with significant disabilities and extremely low incomes access the affordable rental housing opportunities made available through the modernized **Section 811 PRA Supportive Housing for Persons with Disabilities Project Rental Assistance Demonstration** program. The guide also provides direction and information on how service delivery systems and their respective case management entities can help persons who qualify to live in an 811 Project Rental Assistance apartment home achieve and maintain a stable living situation so that an individual has the best opportunity to live a satisfied and inclusive life in the community.

The training guide is primarily directed at case managers—or those charged with collaborating with an individual in identifying that person's community living goals and coordinating services and providers to meet those goals. Case managers working with the 811 Project Rental Assistance Program will rely on the commitment of service delivery systems to provide them with the necessary infrastructure to pave a path for persons with significant disabilities and extremely low incomes to live in an affordable and integrated community home with access to supports and services to live independently. This guide is also intended to be useful for State system policy makers and administrators charged with planning and developing Medicaid funded programs and services for persons with disabilities in Maryland.

This guide is organized into four sections that can be read and understood independently of one another. However, reading each section successively will provide an overall road map for helping a person with a disability access and retain affordable, integrated community housing on SSI level income, beginning with what it takes to form a federal/state partnership foundation to meeting an individual's needs to live a satisfied and inclusive life in a home of one's own.

Section I-Program Overview describes the background of the *Section 811 Supportive Housing for Persons with Disabilities Project Rental Assistance Demonstration* program. This section is useful for service delivery systems to understand the state-level partnership commitments required to successfully implement the 811 PRA Program, how the program is intended to work, who the program is targeting, and the intended outcomes.

Section II-Case Management and the 811 Project Rental Assistance Program provides a comprehensive look at the principles, skills, and practices needed by case managers to successfully link persons to the program and to assist persons achieve and maintain housing stability. This section is useful to service delivery systems to better understand the training, skills, and tool development needed for case managers working with the 811 PRA program and to better evaluate and design the structure of service delivery and/or case management practices when working with the 811 PRA Program. Case managers will also benefit from this section by grasping an understanding of the overall picture of specific knowledge and expectations necessary to assist individuals' access and retain 811 PRA housing opportunities.

Section III-Applicant Process is directed at case managers who are working closely with individuals who may benefit from or desire to live in an 811 PRA apartment home. This section provides a step-by-step guide on how to determine if a person is eligible for the 811 PRA Program, how to refer a person, what to do while a person is waiting for a housing opportunity, and how to help a person secure an 811 PRA unit. This section is a **must** read for case managers intending on referring a person to apply for an 811 PRA unit.

Section IV-Housing Retention Process provides useful information and guidance for case managers on how to help a person living in an 811 PRA unit to achieve and maintain a stable housing situation. This section includes practical guidance on how case managers can support a person to retain housing, how they can identify potential problem areas affecting housing retention, how they can offer intervention steps and strategies, and what they are **required** to do in the event a person has trouble managing a tenant issue. The section includes tools and other resources useful for supporting housing retention. This section is a **must** read for case managers serving persons living in an 811 PRA unit.

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I. Program Overview

In 1999 the Supreme Court recognized that the **civil rights** of persons with disabilities had been breached. Unjustly isolated, segregated from the mainstream of society, and living in institutional settings, people with disabilities had little opportunity to determine their own life choices, interact with people without disabilities, and to participate fully in community life. The 1999 Olmstead decision clarified and upheld a basic principle of the American with Disabilities Act (ADA)—to provide individuals with disabilities opportunities to live, work, and receive services in **integrated** settings, codified as the integration mandate in Title II of the ADA.

What is an integrated setting?

An integrated community setting offers a person with disabilities the opportunity to live his/her life in a home of their own choice, to interact with other persons regardless of whether or not they have a disability, to achieve employment and education goals, to enjoy cultural and recreational activities, to receive self-determined supportive services in vibrant and healthy communities with access to transportation and shopping and medical care, and the opportunity to engage in both formal and informal human interaction.

Meet Cheryl

Cheryl lived in a nursing home for 10 years recovering from a catastrophic automobile accident. While residing in a nursing home, Cheryl was socially isolated living amongst older adults; she had no means to visit family or friends or attend a cultural event outside of the nursing home; and she relied upon nursing home staff to make most of her daily decisions from what she was going to eat to when she was going to bathe. When Cheryl turned 35, she became determined to leave the nursing home. Cheryl now lives in an apartment which is wheelchair accessible in a high-rise elevator building close to the home she lived in before her accident. Cheryl interviewed and hired two care attendants who work a split shift to help with her self-determined daily living needs. Cheryl is pursuing an

associate's degree in Early Childhood Education at a local community college—she has always dreamed of becoming a pre-school teacher. Cheryl volunteers at a daycare center located adjacent to her apartment complex and she is particularly eager to work at the center because her 2-year-old nephew is the loudest and most rambunctious attendee!

Cheryl has transitioned from an institutionalized setting to an integrated community setting and is engaged in community living.

Meet John

John moved from a six-bed group home owned and operated by a mental health service provider located on an isolated suburban cul-de-sac to a mixed-income apartment development in a city neighborhood of his choice. John wakes up every morning and sets out on his daily routine of business—meeting with a case manager that he self-selected, taking the bus to his part-time job, shopping for groceries and planning out his meals. John has developed a close friendship with his next door neighbor—a high school math teacher who is getting married next month. John is looking forward to attending his new friend's wedding.

John has moved into a less-restrictive integrated setting, providing all kinds of opportunities for community inclusion.

Meet David

David entered a segregated residential center for intellectually and developmentally disabled persons when he was 20 years old because his parents were no longer able to cope with some of his behavioral issues. Ten years later the residential center began the process of closing down due to a state-ordered mandate. David, his family and his support staff started to plan for a move to a permanent community residence. David's selection of a home was based on his needs and preferences—he needed to be close to family supports, he wanted to live in a quiet apartment development with a basketball hoop

and a laundry machine and he liked seeing and smelling trees and flowers. David settled for a home of his own that met most of his basic desires—he lives 10 miles from his mom and dad in a garden-style apartment complex. David is very lucky—he worked with a support broker who helped him and his family find a coach, a person who works with David every day to help him connect to his new community and to pursue many of his life goals. David is working on learning how to manage his own budget, he plans out his weekly meals and shops for his own food, and he is now quite skilled at balancing his checking account. David works at a local YMCA washing and folding towels and he enjoys playing basketball every day with other patrons of the Y.

David has moved out of a segregated care facility and is now living in an integrated community setting pursuing his community living goals.

Meet Carol

Carol is a 60-year-old who has spent the last several years living on the streets. She has struggled with bouts of alcoholism and her right leg was amputated after suffering from frost bite during a particularly cold winter three years ago. The last time Carol entered an emergency room for detox, the discharge planning nurse began to look for placement in a long-term care facility. To Carol's relief, a connection and referral was made to a local CIL (Center for Independent Living). The CIL helped Carol with reinstating her SSI benefit, to apply for State Medicaid services that would enable Carol to access services to help with daily living needs—personal care assistance and coordination with community based medical services and substance abuse counseling—and the CIL assisted Carol with locating and securing an apartment home. Carol is working on stabilizing her community life, she continues to receive assistance and guidance from the CIL, and she is now grateful to be living in her own home rather than on the streets. Her new home is in a quiet residential neighborhood within close proximity to medical and counseling supports to help Carol with her recovery.

Carol was diverted from institutionalization and is now living in an integrated community setting offering her the chance to recover and stabilize.

How is the integration mandate of Olmstead achieved?

The integration mandate of Olmstead can be achieved through collaboration and coordination activities between housing and community-based services. Supportive housing is a best practice approach to delivering adaptable supportive services in the most integrated setting appropriate to an individual's needs by providing affordable, safe and accessible housing with access to voluntary supports to enable a person to live independently in the community.

John, Carol, David, and Cheryl all live in supportive housing settings. They have access to case managers, personal care attendants, substance abuse counseling, coaches, and other supports that they have self selected. They live in communities and homes of their choice and **no** more than 30% of their monthly income is dedicated to paying for rent. **John, Carol, David, and Cheryl** have achieved integrated living situations by accessing affordable rental subsidy programs that do not house or place them in settings determined by their classification of disability and they voluntarily accept self-determined services based on their preferences.

At the state level, Medicaid agencies are committed to promoting and facilitating community integration for persons with a disability. At the federal level, the Department of Housing and Urban Development (HUD) and the Health and Human Services Administration (HHS) have recognized that in order for states to fulfill this commitment and to fully meet the integration mandate of Olmstead, a new type of supportive housing model needed to be introduced—the Section 811 Project Rental Assistance (PRA) Program as modernized under the Frank Melville Supportive Housing Investment Act of 2010. This program relies on the strength of a partnership between a State Medicaid Agency and a State Housing Finance Agency to assist the lowest income persons with significant and long-term disabilities live in affordable, integrated housing in communities of their choice with access to voluntary supportive services enabling them to achieve independence and dignity.

A. The 811 Project Rental Assistance Partnership: Collaboration, Cooperation, and Commitment

The new Section 811 Project Based Rental Assistance Program is a comprehensive supportive housing model committed to providing **integrated** living opportunities for extremely low income persons with significant disabilities who qualify for State Medicaid home and community based supportive services. A cooperative partnership between the Maryland Department of Housing and Community Development (DHCD), the Department of Health and Mental Hygiene (DHMH), and the Maryland Department of Disabilities (MDOD) sets the foundation for a more thoughtful and generous approach to providing community inclusion opportunities for persons with disabilities in Maryland.

What does this partnership look like?

The DHCD is Maryland's Housing Finance Agency responsible for operating numerous federal and state programs assisting low-income households obtain safe, decent and affordable housing. DHCD manages the primary production vehicle for the development of new affordable housing—the Low Income Housing Tax Credit (LIHTC) Program. To date, this housing program has generally **not** been affordable to persons with disabilities who qualify to receive Medicaid supports and services.

The DHMH is the single state Medicaid agency responsible for funding and administering Maryland's medical assistance programs that provide home and community-based services and support for low income individuals and persons with disabilities.

The MDOD is a state cabinet level department responsible for promoting and supporting community inclusion for persons with disabilities. Guided by the Olmstead decision and the ADA, MDOD administers and coordinates education, employment, transportation, housing, and other community living opportunities for persons with disabilities.

Under the 811 PRA program, DHCD, DHMH, and MDOD commitments are as follows:

Integration

DHCD is **committed** to working with its affordable housing development partners to identify 150 units in LIHTC developments as well as other federal and State financed developments that either currently exist or will be built or rehabilitated over the next five years in vibrant, choice communities. These units will be located in various types of developments from high rises to garden-style apartment complexes in communities ranging from densely urban to residential suburban neighborhoods. Persons with disabilities will live and interact with other people of mixed income levels and backgrounds, magnifying the opportunity to engage with a broad segment of society inclusive and representative of all persons in Maryland. No more than 25% of the units in each selected development will be set-aside for the 811 PRA program, maximizing the community integration potential for every 811 PRA selected development. DHCD is **responsible** for administering rental contracts and other functions necessary to facilitate a 30-year project-based rental assistance program so that monthly rents remain affordable for persons receiving SSI benefits or other limited income.

Voluntary Supports and Services

DHMH is **committed** to working with its service provider partners to identify the highest need persons who would benefit from and qualify to live in an 811 PRA development, to develop and implement outreach and referral systems to reach and inform persons with disabilities about the 811 PRA program, and to make available appropriate services and supports for tenants

qualifying for an 811 PRA unit. DHMH is **responsible** for administering a flexible and responsive service provision system providing a wide-range of medical services and supports to enable persons with a disability to live independently in their homes throughout the 30 year life of the 811 PRA program.

Community Inclusion

MDOD is **committed** to working with its community and state partners to foster community living opportunities and removing barriers to achieving community inclusion for persons with disabilities who access the 811 PRA program. MDOD is **responsible** for managing a state-wide referral system for the 811 PRA Program that will ensure broad reach and access for persons with disabilities, regardless of type of disability or service funding system.

DHCD, DHMH and MDOD are working toward a common vision: to ensure that extremely low income persons with disabilities have places to live in Maryland where they can thrive, achieve their life goals, feel included in their communities, and have access to the supports, services and opportunities they need to live independently in communities of their choice. The strength and success of the 811 PRA Program relies not only on these shared agency commitments, but also on the engagement and effectiveness of ground-level case managers and support staff.

The purpose of this manual is to provide you—the case manager—with information and tools to help you assist persons with significant disabilities and extremely low incomes access affordable housing made available through the 811 PRA Program, and to support persons to be successful and satisfied tenants and community members. Each chapter will explore the critical components, processes and practices needed to help persons with disabilities access the 811 PRA Program, to maintain a good tenancy, and to achieve community living goals. The manual includes guidance on roles and responsibilities, direction on program rules, regulations and processes, advice on suggested skills and practices, and includes useful definitions and scenario-based examples. Throughout the manual, we emphasize that the persons you are working with are central to this process.

B. Basic 811 Project Rental Assistance (PRA) Program Definitions and Elements

What is an 811 Project Rental Assistance (PRA) development?

An 811 Project Rental Assistance development is a privately owned and managed apartment complex that receives federal and/or State financing assistance to keep rents affordable for households with incomes at or below 60% of the Area Median Income (AMI).[1] Up to 25% of the units in an 811 Project Rental Assistance development will be set aside for persons with disabilities between the ages of 18-62 who have access to voluntary supportive services and whose total household income is less than 30% of the AMI. A standard lease (not less than 12 months) and a normal tenant/landlord relationship will occur. Monthly rent payments for qualified 811 PRA tenants will be determined by the household's income, not to exceed 30% of an individual's monthly income.

What is an 811 PRA Rental Assistance subsidy?

The 811 PRA program is project-based rental assistance provided to a rental apartment development. The rental subsidy is not attached to an individual. The rental subsidy allows the owner/investor of the apartment development to receive full market rent or rent-restricted rent for the unit while a person living in an 811 PRA unit pays a monthly rent amount equal to @ 30% of the household's total monthly income. The rental subsidy is funded by federal allocations from the Department of Housing and Urban Development (HUD). An eligible 811 PRA tenant whose total household monthly income is $600 would expect to pay @ $200 a month for gross rent.[2] If a person decides to move out of an 811 PRA rent subsidized unit, the rental subsidy remains with the rental apartment development and the person will then be responsible for paying market rent in another type of rental development or identifying another rent subsidy program or arrangement.

Who lives in an 811 PRA development?

An 811 PRA development is an integrated living setting, providing an apartment rental opportunity for any applicant (s) meeting the income, credit, and personal background selection criteria of the privately managed development. Up to 25% of the units may be set aside for persons with a disability qualifying for the 811 PRA program and the remaining units will be occupied by persons of various income, family size/composition, age, ethnicity, race,

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[1] **Area Median Income (AMI)**: The estimated median income, adjusted for family size, by metropolitan area (or county in Nonmetropolitan areas) that is adjusted by HUD annually and used as the basis of eligibility for most housing assistance programs.

[2] **Gross rent** is the **contract rent** plus the estimated average monthly cost of utilities (electricity, gas, and water and sewer) and fuels (oil, coal, kerosene, wood, etc.) if these are paid by the renter. If an 811 PRA unit has a contract rent of $800 a month and 30% of the tenant's household income is $200 and the estimated utilities are $100 a month; the tenant pays $100 a month to the landlord and an estimated $100 a month to the utility company; the 811 PRA Program pays the 811 Property $700 a month.

and gender, regardless of whether or not a person has a disability. Each privately managed apartment development will determine its own selection criteria and will require a separate application.

Who is eligible to apply to live in an 811 PRA unit?

A person must meet the following threshold criteria:

- A person with a disability
- Between the age of 18-62
- Receiving SSI/SSDI income or other income at or below 30% of Area Median Income (AMI)
- Access to voluntary supportive services

A person applying for an 811 PRA unit must be referred by a qualifying service system/provider entity. The DHMH is responsible for determining a qualified system/provider entity. The following agencies/systems and their designated contracted providers may submit a referral for a client:

- Department of Mental Health and Hygiene (DHMH)
- Mental Health Administration (MHA)/Behavioral Health and Disabilities Administration
- Developmental Disabilities Administration (DDA)
- Area Agencies on Aging (AAA)
- Centers for Independent Living (CIL)

How will applicants be selected to submit an application for an 811 PRA unit?

Applicants will be prioritized by the State of Maryland's policy initiatives aimed at reducing unnecessary institutionalization and use of restrictive settings as primary housing options, and to end homelessness. Applicants are prioritized on a centralized referral list managed by the Maryland Department of Disabilities. Applicants will be prioritized in the following order:

- Currently residing in an institution such as a nursing home and eligible for Medicaid HCBS
- Living in the community but at risk for institutionalization due to housing situation
    - Substandard housing posing risk/threat to health and safety
    - Inaccessible housing posing risk/threat to health and safety

- Developmental Disabilities Administration (DDA) Community Pathways Waiver participants and Mental Hygiene (MHA) Residential Rehabilitation Program participants moving from group homes and/or Alternative Living Units (ALUs) to less restrictive settings
- Homeless persons who are Medicaid eligible as prioritized in the HEARTH Act by definition order of homelessness (HEARTH Act of 2009)

What is 811 PRA Program access?

811 PRA Program **access** refers to the case management processes and procedures necessary to assist a person with a disability to access an 811 PRA unit. This includes the following:

- Program outreach and referral
- Application assistance
- Documentation acquisition
- Housing barrier removal or minimization
- Reasonable accommodation usage
- Transportation assistance
- Application and security deposit fee assistance
- Move-in assistance

What is 811 PRA Program retention?

811 PRA Program retention refers to the case management processes and procedures necessary to assist a person with a disability to retain housing in an 811 PRA unit. This includes the following:

- Lease compliance
- Property manager/landlord relationship facilitation
- Voluntary supportive services enrollment, planning, and resource referral
- Self satisfaction and enjoyment of home and community
- Reasonable modification usage
- Reasonable accommodation usage
- Program cessation

What are voluntary supportive services?

Voluntary supportive services in the 811 PRA Program emphasize personal choice in the selection of the type, kind, and duration of services and include the provision that an individual may choose not to receive any supportive services. All applicants and tenants of the 811 PRA Program must have **access** to supportive services; the scope and array of services will vary across disability systems and will also be dependent on individual need and preferences. 811 PRA participants will be responsible for choosing services, engaging in the service planning process, and interacting with case managers assisting with 811 PRA Program referral, access, and retention efforts.

Cheryl meets the highest policy priority need for an 811 PRA unit. She transitioned from a high cost institution to the community and is receiving supportive services through a Maryland Medicaid Home and Community Based waiver. Cheryl's service coordinator from the Maryland Medicaid Living at Home Waiver entered her name on the 811 PRA Referral System list.

John and David meet the third policy priority need—to provide opportunities for persons with disabilities to move into less restrictive settings. John's case manager from a Core Service Agency under MHA placed his name on the 811 PRA Referral System list and David's resource coordinator from DDA submitted his referral.

Carol meets the definition of homelessness. Diverting an individual from an institution is a Maryland policy priority. Carol was connected to Medicaid State Plan services through the assistance of an Independent Living Specialist from a CIL who also placed her name on the 811 PRA Referral System list.

II. Case Management and the 811 Project Rental Assistance Program

The intent of the 811 PRA program is to develop a sustainable and effective supportive housing model in Maryland that engages a results driven process to provide integrated and affordable housing opportunities for persons with significant disabilities and extremely low incomes. Approximately 150 units will provide the following intended opportunities, inputs and outcomes:

The intended **opportunities** include:

- Affordable and accessible units located in healthy and vibrant communities
- Integrated living situations maximizing community inclusion opportunities
- Opportunities to promote self-sufficiency and quality of life
- Opportunities to provide flexible and adaptable services targeting housing stability
- Opportunities to strengthen partnerships across systems and between local housing providers and service providers
- Opportunities to discover accomplishments, identify problems, determine solutions, and develop best practices

The intended **inputs** include:

- Effective outreach and program education
- Efficient client referral system
- Synchronized Medicaid services eligibility systems
- Responsive and flexible case management systems

The intended **outcomes** include:

- High target population participation rates
- Full access to voluntary supportive services

- High tenant home and community life satisfaction rates
- 100% unit utilization rates
- 30-60 day unit turnover to occupancy rates
- 90% + housing retention rates

The intent of this manual is to focus on your efforts—the case manager—to build the capacities critical to creating these opportunities, providing these inputs and achieving these outcomes. Developing a strong person-centered approach, focusing on core skills and practices, understanding processes and regulations, and promoting accountable partnerships will lead to success. Your expertise and professionalism can help to ensure that the persons you serve have access to an 811 PRA unit, have access to services and support to achieve community living goals, and have successful tenancies and relationships with 811 PRA housing providers.

Who is the case manager in your system?

The case manager is the individual charged with collaborating with an individual in identifying that person's community living goals and coordinating services and providers to meet those goals. Depending on each respective service delivery system, the case manager may be referred to as a service coordinator, resource coordinator, case manager, behavioral health specialist, or independent living specialist.

Successful implementation of the 811 PRA Program will require case managers to have knowledge and experience with the following:

- Navigating complex health and housing systems
- Communicating with multiple persons from family members to health and housing providers
- Establishing effective partnerships with service recipients
- Advocacy and negotiation skills, especially pertaining to overcoming challenges

And responsibilities of a case manager working with individuals and the 811 PRA Program will need to include the following:

- Assisting individuals with identifying community living goals
- Coordinating supports and services to help a person **access** the 811 PRA Program and to **retain** housing once living in an 811 PRA unit

- Fostering strong relationships with community organizations and resources, including housing providers to help an individual access and retain housing.

A committed systems approach to developing a case management structure that enables a person to access and retain affordable housing in an 811 PRA unit will deliver multiple benefits, from improvements in a person's ability to achieve community living goals, reduction in overall health costs, increased engagement and partnerships between housing providers and health delivery systems and providers, and dramatic increases in the quality and opportunity of community inclusion for persons with disabilities.

A. 811 PRA Case Management Philosophy

Fundamental to the design of a successful supportive housing program is the ability of case managers to not only coordinate medical, behavioral, and social services but also to promote choice and independence, strengths and assets, and preferences and desires. A person-centered approach is a key practice when recognizing housing stability as an essential component to helping an individual with significant and complicated health and social needs achieve community living aspirations.

A person-centered housing approach seeks to help a person with disabilities discover their strengths and assets, evaluate their past housing history to reveal successes and challenges, to identify community housing goals, to ascertain services and supports to help a person access and retain housing in an 811 PRA development, and to assist a person with determining if the 811 PRA Program is appropriate for them.

The provision of services in the 811 PRA Program is strictly voluntary, determined by the individual and their circle of support and based on an individual's preferences. Flexible, creative and responsive services are fundamental to the design of a successful supportive housing program.

In preparation for developing a person-centered housing approach, service systems and their respective providers may want to think about the following:

- How do you work with persons with a disability who desire to live in independent community housing?
- What services do you provide to support independent community living?
- How do you determine what services are needed to help a person access and retain housing?
- What challenges do persons encounter when they seek independent community housing?

- What challenges do persons encounter when they are living in the community?
- What services, activities, or practices work well for the persons you serve?
- What specific services or practices impact housing retention?

Case management and service planning is a dynamic and fluid process that can substantially contribute to positive outcomes for the 811 PRA Program. The ability to adjust plans, to increase or decrease the intensity of case management involvement, to customize services based on an individual's preferences and needs, and to assess the effectiveness of practices and services will lead to the achievement of positive 811 PRA outcomes. Case managers working with the 811 PRA Program must get to know each individual, they need to establish a personal and long-term relationship with a person, and they will want to discover a person's assets and strengths and motivators to help a person with disabilities understand 811 PRA tenant commitments and obligations leading to a successful opportunity to live in an integrated community setting.

When **David** applied for the 811 PRA Program, it was discovered by his resource coordinator that David had never rented an apartment on his own and in fact had never lived by himself. David's resource coordinator also learned that David had an affinity for adding and subtracting numbers and David expressed a strong desire to independently manage his own bank account including paying his monthly rent bill. David and his family, with the assistance of a resource coordinator, mapped out a plan for successfully introducing David to the world of rent obligations and household budgeting. The plan involved setting up a monthly automatic rent deposit, an arrangement that was set up between the property manager and David's bank. The plan also designated David's resource coordinator as the responsible entity for paying his other monthly expenses—cable, gas and electric bill, and his weekly food bill. After living in the community for 12 months, David acquired the skills and knowledge to independently manage and balance his bank account and to pay his monthly bills. David's resource coordinator helped David achieve a higher degree of independence and his plan of service was adjusted accordingly to include self-direction regarding his monthly household budget obligations. David no longer relies on his resource coordinator to pay his bills and balance his checking account. David continues to pay his bills on time and his ownership of this responsibility has increased his self-esteem and self-worth.

B. 811 PRA Case Management Core Principles

The success of the 811 PRA Program depends on the ability of case managers to recognize and adopt a set of core principles to include:

Principle One: The 811 PRA Program is a **partnership effort** between multiple entities and organizations. Some of these partnerships include:

- A partnership among an 811 PRA **applicant** and a case manager and property manager
- A partnership among an 811 PRA **tenant** and a case manager and property manager
- A partnership between DHMH and ground-level supportive service providers
- A partnership between DHMH and cross-disability systems
- A partnership between DHCD and property owners of 811 PRA designated units
- A partnership among DHCD, DHMH, and MDOD

Principle Two: The 811 PRA Program is a **person-centered housing model requiring flexible and creative service planning** to address the community living aspirations of persons with a disability and to support a person as a tenant in an 811 PRA development. Assimilating awareness and understanding about the responsibilities associated with being a tenant in an 811 PRA development and providing access to relevant services to support a positive tenancy are integral to the development of a person-centered planning housing effort.

Principle Three: The 811 PRA Program is a **cross-disability program** intended to serve individuals based on their need, not their disability. Multiple system silos will be bridged throughout the life of the 811 PRA Program—systems and programs serving persons with mental health, physical disabilities, developmental/intellectual disabilities, or persons accessing multiple service system streams. All disability systems will benefit from a cooperative and non-competitive approach as each service system designs and implements its own unique program to assist clients' access and retain an 811 PRA unit.

Principle Four: The 811 PRA Program is a **multisystem model** requiring case managers to also understand how to access affordable housing programs, how to interface with housing providers, how to advocate for and assist persons with disabilities overcome challenges or barriers to housing, and how to understand complex housing rules and regulations and policies and procedures. A solid housing knowledge base and consistent practice and experience with accessing and retaining affordable housing programs is essential to achieve intended 811 PRA Program outcomes.

Principle Five: The 811 PRA Program is an **effective supportive housing model** relying on case managers across service systems to share knowledge on best practices, on effective services, and on patterns and trends regarding challenges and successes. Evaluation and measurement of outcomes will provide insight about how clients access the 811 PRA Program, about how clients retain housing once in an 811 PRA unit and about how clients exit the 811 PRA program.

C. Housing and Service Models: Recognizing Capacities and Strengths

John, Cheryl, David and Carol have individual community living preferences, different life experiences, and varying levels and degrees of supportive service needs. Depending on the respective service system, the delivery and emphasis of supportive services and case management for **John, Cheryl, David and Carol** will have divergent structures and models. For **Cheryl**, a younger adult with a physical disability supports and services are provided through a Medicaid Waiver Program offering both transition coordination and service coordination. Under this particular program, the State Medicaid entity has a contract with a non-profit care coordination organization to coordinate the provision of services. **Cheryl** accessed affordable housing and supportive services via:

A model embedding and integrating the professional expertise of service coordinators and transition coordinators, housing coordinators, and nurses and social workers to assist individuals with complex medical and social needs move out of institutions into independent community homes of their choice. In this model, service coordinators are experts at navigating Medicaid systems and housing coordinators are experts at navigating affordable housing systems in order to best serve and assist persons with disabilities move into communities and homes of their choice, access self-chosen services and supports, and remain healthy and safe in the community. Access to the expert advice and resources of professional nurses and social workers who support teams of 10 service coordinators working with 30 clients each and one housing coordinator assigned to each team to assist all of the team's combined client caseload frames the structure of this model allowing for flexible, creative, and person-centered service planning and housing access and retention efforts. For **Cheryl**, this model promotes and maximizes her opportunities for community inclusion.

For **John**, an adult accessing Medicaid mental health supports and counseling, services are provided through Medicaid funded behavioral health programs that include case management. **John** accessed affordable housing and supportive services via:

A model utilized local private non-profit organizations to provide case management support to coordinate mental health services and supports. Case Managers specialize in behavioral health counseling and service provision with caseloads of 1-60. A Housing Specialist at the State

System level works on building and developing relationships and collaborations with affordable housing providers and also is responsible for developing curriculum and training on how to access affordable housing programs and how to help a person stabilize and retain community housing for case managers working with persons eligible to receive Medicaid funded mental health services. Case Managers are not experts in housing; but they have access to expertise within the State service delivery system and they receive housing related training on access and retention. For John, he was assisted by a case manager to identify community living possibilities beyond a group home setting, and eventually was able to move into his own independent apartment.

The provision of services and supports may not look the same for **John, David, Cheryl and Carol;** not only will services be based on individual preferences, but also on the systems for delivery of services and the structure of a case management system. Some service delivery systems will have the capability to embed both housing case managers and service case managers working in tandem to help an individual achieve community living goals; some systems will have the capacity for small caseload ratios; and some systems will have the capacity for immediate access to professional social, health, and housing expertise. Whatever the current capability of the system, it is highly encouraged and recommended that each service system continue to accommodate a wide range of individual needs while also incorporating the above mentioned basic core principles into the development of their system to support a successful 811 PRA Program.

D. 811 PRA Case Management Core Skills

A person-centered 811 PRA Program incorporating the housing needs of individuals with significant disabilities and extremely low incomes will require the development of a set of case management core skills and practices. These include:

- Engagement
- Developing a trusting relationship
- Goal Setting
- Assessment and planning
- Resource connection
- Intervention
- Service delivery

Engagement Skills

The ability to effectively engage a person seeking tenancy in an 811 PRA development involves long-term interactions focusing on choice and independence. Effective engagement skills include:

- Open-ended questioning
- Motivational interviewing
- Reflective listening

Carol is a person who experienced several years of homelessness and she faced many occurrences of debilitating behavioral health conditions. Carol was reluctant to engage in services, she was difficult to contact, and she was apprehensive to ask for help. The Mental Health Agency providing case management services and behavioral health services for Carol invested in the professional development of their service providers. Carol had access to a case manager that gradually developed a trusting relationship with her by using an engagement process relying on consistent interaction, an accepting approach based on strong listening skills and open-ended questioning, and exploring common ground, allowing Carol to begin to set goals to meet the requirements to apply for permanent housing and to meet the obligations of tenancy. Carol's case manager found creative approaches, offered flexible solutions and alternatives, and Carol began to trust her case manager forming a partnership that enabled Carol to set goals towards achieving housing stability.

Engagement skills are explained, discussed, and role played in the Maryland Money Follows the Person Person-Centered Planning for Housing Needs curriculum and training series. It is highly recommended that case managers working with the 811 PRA Program receive this training to explore, enhance, and refine engagement skills in order to effectively develop a working relationship with persons with disabilities desiring to access and retain housing in an 811 PRA development.

When incorporating engagement skills into case management practices for the 811 PRA Program, case management programs may want to consider the following:

- Specific engagement strategies may work for one individual while providing different outcomes or levels of effectiveness for another individual.
- The length of time to develop a trusting relationship will vary with each individual.
- Voluntary supportive services including case management services emphasizing choice and independence will be embraced in different ways and degrees by individuals accessing and retaining housing in the 811 PRA Program.
- Case management programs may want to structure their service to include:
- Developing clear policies and procedures for engagement that will encourage flexible responses based on individual need. Remember that services are voluntary and some persons may refuse to accept supports and services or choose to remain somewhat detached from case managers.
- Developing case management structures allowing for long-term interactions between an individual and a case manager.
- Developing a multi-team structure and/or an expert based structure allowing for a team to engage and form a relationship with a client to ensure continuity of trust. If frequent staff turnover is prevalent in your system, a team approach may be highly valuable.

Service Planning Skills

Service planning for the 811 PRA Program is a person-centered process relying on case managers and disability systems to provide flexible, creative and individualized services and supports. Service planning for the 811 PRA Program should demonstrate the flexibility to provide:

On-going voluntary services meeting the preferences and needs of 811 PRA tenants

- Services and supports to help tenants maintain housing stability in an 811 PRA unit
- Services and supports to help a person maximize their independence in an 811 PRA unit

How can disability systems and case managers provide flexible, creative, and individualized service planning for the 811 PRA Program?

Disability systems should be encouraged to set standards and practices that are consistent with achieving successful 811 PRA Program outcomes—meeting the housing and service needs of persons, high housing retention and tenant satisfaction rates, and helping persons achieve community living aspirations.

To achieve these goals, **disability systems** may want to incorporate strategies and program characteristics that reflect the following:

- Caseload assignments which are manageable to meet the needs of the persons served in the 811 PRA Program
- Home/site visit policy to meet the needs of the persons served in the 811 PRA Program
- Communication intervals to meet the needs of the persons served in the 811 PRA Program
- Synchronized service eligibility systems coordinated with access to housing and updating, changing or modifying service plans to meet changing needs of individuals
- Adequate and on-going training for case managers on housing access and retention practices
- Effective methods for engaging and expanding network of community resources

Case managers working with applicants and tenants in the 811 PRA Program may want to coordinate or directly provide the following type (s) of non-medical and independent living skills services to persons participating in the 811 PRA Program:

Move-in assistance

- Identifying community resources for security deposits/moves
- Coordinating moving day logistics
- Acquiring basic household essentials

Good tenant training

- Understanding your lease
- Training in apartment safety
- Training in housekeeping
- Rent payment counseling

General supportive services

- Peer counseling/mentoring
- Financial management/Rep Payee counseling
- Entitlement counseling

- Using and accessing public transportation
- Conflict resolution/mediation counseling
- Vocational services
- Recreational/social connections
- Legal assistance
- Emergency financial assistance
- Home meal assistance
- Crisis intervention

Case managers may want to develop tools and assessments to help a person understand what types of services may lead to a more successful tenancy in an 811 PRA development. A housing assessment tool as described in the next section can provide insight into a person's successes and challenges regarding community living. A "housing readiness" checklist can help a person realize possible housing support needs as the transition to a permanent home in an 811 PRA unit approaches. A checklist could include the following:

Housing Readiness Checklist

Do you need assistance with any of the following community housing living skills?

- Paying Rent on Time
- Keeping up with utility bills
- Engaging in friendly neighbor relationships
- Keeping apartment free of excessive clutter
- Keeping apartment clean
- Meeting lease obligations such as responsibility for guests and respecting noise levels

Do you need assistance with managing any of the following supports and services?

- Health and medical care
- Substance abuse supports and resources
- Mental health supports and resources
- Community inclusion such as recreation, entertainment, social connections
- Relationships with family, friends and informal supports
- Public transportation

Figure 2.1 Housing Readiness Checklist

An environmental assessment tool or home visit tool can be developed to identify and assess individual challenges to meeting core tenant responsibilities—paying rent on time, keeping a home safe and respecting the rights of other tenants.

Possible questions to ask and observations to note during an 811 PRA tenant monthly, quarterly or annual home visit regarding core tenant responsibilities might include:

Rent
Have you been able to pay your rent on time every month?
Is your utility bill current?
Has your household income changed?

Clean/Safe
Have you had any home maintenance or home repairs done to your apartment?
Is the apartment home clutter free?

Are smoke detectors working?
Is food and waste properly stored?
Insect/rodent infestation?

Tenant Relationships
What kinds of interaction have you had with your neighbors?
Have you encountered any new apartment staff personnel over the last 3 months?

If problem areas are identified during the home visit, case managers will need to offer strategies and resources to assist a person change or modify behaviors and provide access to additional supports and services to help with maintaining a stable tenancy.

When **Cheryl** met with her service coordinator during a quarterly visit an Environmental Assessment tool was used by the service coordinator to ascertain the current physical condition of Cheryl's home and to gather information about the state of her current tenancy, including Cheryl's rent payment history over the last three months. Cheryl reported that she was actually behind with her rent payments and had attempted to pay a portion of her rent this month, but the property manager would only accept full payment. Cheryl revealed that several unanticipated personal needs had come up the last few months including birthday presents for her nephew, an upgrade to her cable services, and costly hair salon visits. Cheryl's service coordinator offered several strategies and provided information about community resources. The strategies included meeting with the property manager to immediately set up a rent arrearage payment plan—Cheryl would need to pay $25 extra each month for the next 3 months to catch up; and the second strategy was to assist Cheryl with connecting to a community resource providing budgeting counseling. Cheryl's service coordinator also talked to Cheryl about using a rep payee or utilizing a direct deposit arrangement for rent payments. Cheryl did not think she needed an intensive intervention—she felt that a budgeting class was the best option.

Proactive service planning that helps a person identify individual strengths and personal challenges to community living and service planning that incorporates the preferences of an individual promotes a successful tenancy.

John and his case manager began discussions about his experience as a renter in the community long before he submitted an application for an apartment. John revealed his troubles including difficulty paying his rent on time leading to escalating tension with his landlord and eventually an eviction. John's case manager introduced the idea of using a direct deposit system to pay his monthly rent—an arrangement requiring a relationship with a mainstream bank and an agreement with a landlord to also establish a banking process with the same bank. John was apprehensive—he preferred to have full control over his finances, he did not want his future landlord to know anything about his financial relationships, and he felt that he was successfully dealing with his mental health issues so that he could manage his community living with minimal interference or special considerations. John's case manager suggested another service option—to include questions about his handling of rent payments and other tenant obligations during a monthly case manager contact. John liked the suggestion, and with the input of his case manager, a set of questions was developed and incorporated into a monthly phone contact. John and his case manager implemented this service engagement option when he moved to his new home in the community.

Responsive and flexible service planning that meets the current needs of an individual leads to long-term housing stability.

Carol had a difficult time transitioning from street life to a permanent housing situation. Carol's case manager recognized that the adjustment from streets to housing was a significant lifestyle change for Carol, especially when establishing routines and setting up consistent supportive services. Carol's case manager provided intensive care coordination during the first 90 days of Carol's tenancy—ranging from helping Carol facilitate new neighbor relationships to setting up a system to pay her rent on time to helping Carol orient herself to her new home and neighborhood, all above and beyond coordinating Carol's mental health, substance abuse counseling, and medical supports and services. Carol's case manager met with Carol almost on a daily basis during the first month of her move, gradually reducing the number of face-to-face interactions to once a week by day 90 of her

tenancy. Carol's case manager entity was flexible and responsive—meeting the more intensive needs of Carol's particular situation, and adjusting staffing time and caseload to achieve the intended outcome of stabilizing Carol in her new permanent home.

A creative and individualized service planning approach endorses a person's desire and ability to take ownership of their community living experience.

David has always taken pride in his ability to handle and master independent living skills. The more David does for himself, the higher his self-esteem and self-worth, contributing to self-managed positive behavior for David. From the first day of tenancy, David had insisted on cleaning his own apartment and in fact became very upset whenever his personal support staff performed any cleaning tasks. However, David lacked the attention to basic cleaning details including proper food storage and trash disposal. A rodent infestation surfaced, causing property management involvement. David's resource coordinator had recently learned about a job skill preparation class at the local YMCA for people interested in the fast food industry. David's resource coordinator asked the class instructor if the curriculum could be tailored slightly to introduce training around basic sanitary procedures for both the workplace and the home. David was then informed about the class and decided that he would like to attend. David picked up many useful tips and hints on how to keep a place properly sanitized and he worked with his resource coordinator to develop a daily check list of cleaning tasks. David's apartment is now rodent free and he continues to use his checklist to help him keep his apartment healthy and clean.

Service planning that supports housing retention for the 811 PRA Program will focus on helping an individual to embrace their tenant responsibilities. Service planning should be strength and asset based with supports and services offered and made available to help a person achieve their community living goals. Service planning intended to help resolve a particular tenancy issue or concern will generally involve the following actions:

- Assessment of the situation/incident
- Suggestion of services and supports to help with the situation
- Plan of Service update/amendment and including individual's goals and added supports
- Data and information about interventions and supports/services

Networking and knowledge sharing with case managers across disability systems will lead to numerous opportunities to increase approaches and strategies and services and supports to help a person maintain a stable tenancy. Sharing experiences and solutions about what worked or did not work well to help a person maintain housing, about specific services or practices that impacted housing retention for the persons you serve, and sharing evaluation methods about the effectiveness of interventions or services to help a person retain their housing is highly recommended for all systems and associated providers to pursue.

E. Case Management Core Housing Practices for Accessing the 811 PRA Program

Developing strong, consistent, and tailored case management practices to help a person with a disability access an 811 PRA unit involves knowledge and practice with the following:

- Conducting a person-centered housing assessment tool
- Acquiring housing documentation
- Identifying and overcoming barriers to housing
- Using reasonable accommodations for eligibility purposes
- Completing 811 PRA development specific eligibility packets

Case managers will also want to understand **three** basic characteristics of 811 PRA apartment developments when defining and implementing core practices:

1 **Project-based Rental Subsidy**
The rental subsidy is attached to the unit, not to an individual. Mobility and transferability of the rental subsidy is not available. Case managers will need to help a prospective applicant understand that a decision to live in an 811 PRA unit generally involves a long-term commitment.

2 **Privately-Managed and Privately Owned**
Each 811 PRA development is a privately owned and managed entity. Each development will have a unique application, unique selection criteria, and its own set of application and leasing processes and procedures. Case managers will need to facilitate relationships and learn specific eligibility and tenancy obligations for each privately managed development in order to fully understand how best to help a person with a disability access and retain housing in an 811 PRA development.

3 **Mixed-Income Development**
Many of the 811 PRA developments will be mixed income, providing affordable rental housing opportunities for households with incomes ranging from 30-60% of Area Median Income. Persons qualifying to rent an 811 PRA unit will have incomes at or below 30% of AMI. Some developments will also have market rate apartments available to higher income households. Rental markets targeting households at 60% of AMI are very competitive; property managers and owners are interested in capturing this market share and therefore rely on a high quality rental environment to include good tenant and neighbor relations, high safety ratings, and overall superior property maintenance standards. Case managers will want to assist clients with fully understanding tenant obligations prior to applying for an 811 PRA unit and throughout a person's tenancy.

Figure 2.2 Three PRA Characteristics

1. How to Conduct a Housing Assessment

A housing assessment is a person-centered process that encourages an individual to focus on strengths and assets and choice and preferences when exploring community living options. The objective of a housing assessment is to obtain information, data and knowledge about a person's housing history in order to help a person achieve community living goals. An effective housing assessment process for the 811 PRA Program should incorporate the following components and practices:

- Face-to-face interview with a person to develop and strengthen a trusting relationship and to initiate a dialogue about a person's previous and current living arrangements, including successes and challenges and future housing preferences
- Identification of possible challenges to accessing the 811 PRA Program such as credit, criminal, or poor rental history
- Educating and informing a person about 811 PRA Program and tenancy obligations
- Helping a person understand possible challenges to moving into an 811 PRA development from paying rent on time, being a good neighbor, and maintaining a home
- Helping a person to identify community living preferences including what neighborhood qualities and characteristics are important to a person from transportation options, apartment styles, shopping amenities, and physical living arrangements
- Assisting a person to obtain all necessary documentation needed to apply for the program
- Developing strategies to assist a person achieve a successful 811 PRA lease-up and tenancy
- Obtaining a consent to release information pertaining to accessing housing
- Documenting information and data in a readily accessible format

The 811 PRA Program will accommodate a wide-range of individual needs, providing an affordable housing opportunity for persons with complex medical and health situations and extremely low incomes across all disability systems. A housing assessment tool provides guidance and direction on how to help a person navigate through the affordable housing system. Each disability system referring clients to the 811 PRA Program is highly encouraged to develop an assessment tool based on system domain(s) and utilizing person-centered engagement tools and practices.

Cheryl worked with a housing coordinator, a person with specialized knowledge and experience with affordable housing, at the same time she was being assisted by a service coordinator helping her to navigate through the eligibility process for a Medicaid waiver program providing supports and services enabling Cheryl to live independently in the community rather than in a nursing home. Cheryl's housing coordinator utilized a housing assessment tool referred to as an “Initial Housing Intake” to gather information about Cheryl's housing history. Cheryl’s housing coordinator learned that Cheryl had a few credit issues, including a car repossession and an outstanding utility bill. Cheryl's housing coordinator also discovered that Cheryl had consistently paid her rent on time and had a good relationship with her landlord prior to her accident. Cheryl's credit issues were primarily related to a sudden and unexpected life event. Cheryl's housing coordinator used the information and data from the housing intake to help Cheryl determine her housing options and goals and to develop strategies to achieve the goal(s).

INITIAL HOUSING INTAKE

Date:_____ Name:_____ Social Security #: _____-_____-_____ DOB: ___/___/___ Age:_____

Address:_____ Phone #:_____

Are you a person in a wheelchair? ☐ yes, width_____ ☐ no
Have you served in the US Military? ☐ yes ☐ no
Who else will be living with you in the community?
- ☐ No one
- ☐ Family member(s) - Name/contact information: _____
- ☐ Friend (s) - Name/contact information: _____
- ☐ Live-in-Aide - Name/contact information: _____

What county/city/jurisdiction (s) are you willing to reside in?
_____

Income information: Do you receive a nursing home monthly stipend? Amt: $_____

☐ No income | ☐ SSI ☐ SSDI | ☐ Pension | ☐ Other

Housing Documentation:
Do you need assistance with obtaining the following housing documentation?
Check all that apply
- ☐ Social Security Card
- ☐ Government-issued picture ID
- ☐ Birth Certificate
- ☐ Proof of Income letter from Social Security
- ☐ Current bank statement(s)
- ☐ Other income and asset documentation

Transportation Information:
Have you applied for Mobility/Para-transit in your county/jurisdiction of residency?
☐ Yes ☐ No
Do you travel on your own?
☐ Yes ☐ No
Do you have other transportation options?
☐ Yes ☐ No

Housing History: Check any that apply
- ☐ Private Rental – if yes, development _____
- ☐ Section 8/HCV – if yes, jurisdiction _____
- ☐ Public Housing – if yes, jurisdiction_____
- ☐ HUD Subsidized – if yes, development _____
- ☐ Shelter/homeless – if yes, date(s) _____
- ☐ Eviction history – if yes, when_____
- ☐ Foreclosure– if yes, date(s)_____
- ☐ No experience as lease-holder

Did you have trouble with:
- ☐ Paying your rent on time?
- ☐ Keeping up with utility bills?
- ☐ Visitors/guest problems?
- ☐ Landlord or neighbor relationships?
- ☐ Clutter/ home maintenance?

Credit History: Check any that apply
- ☐ Past due utility/phone bill - Utility company/amount: _____
- ☐ Past due credit card bill(s)
- ☐ Owe money to a public housing authority
- ☐ Past due rent
- ☐ Other past due bills
- ☐ Medical bills
- ☐ Filed for bankruptcy Date_____

Do you need assistance with reviewing your credit history? ☐ Yes ☐ No

Criminal History: Check/date any that apply
- ☐ Prior Arrests:_____
- ☐ Prior Convictions:_____
- ☐ Prior Incarcerations:_____
- ☐ Open warrants/parole/probation: _____

Do you need assistance with reviewing your criminal record? ☐ Yes ☐ No
Do you have legal representation? ☐Yes ☐No

What were your successes in the community prior to entering a NF?
_____

What were your challenges?
_____

Housing Goals:
_____
_____
_____
_____

Housing Support Determination

What are a person's assets?
- ☐ Ability to pay rent on time
- ☐ Ability to manage money
- ☐ Ability to maintain positive relationships
- ☐ Family/friend support
- ☐ Community inclusion (interest/past participation)
- ☐ Long-term rental history
- ☐ Ability to maintain home
- ☐ Ability to use transportation
- ☐ Motivation to resolve legal/credit issues
- ☐ Motivation to obtain housing
- ☐ Other

What are a person's challenges?
_____
_____

Objectives/Steps to Overcome Challenges
_____
_____

Service Plan Options: ☐ Household Budgeting ☐ CCCS referral ☐ Household Safety ☐ Adaptive Tech ☐ Other
Reasonable Accommodation (s):

Housing Goal: Progress, Setbacks, Revisions

Housing Preferences

Proximity to:
- ☐ Transportation
- ☐ Shopping
- ☐ Medical
- ☐ Religious Community
- ☐ Family/Friends
- ☐ Recreation/Cultural
- ☐ Other

Locale:
- ☐ Urban/Downtown
- ☐ Urban/Residential Neighborhood
- ☐ Suburban
- ☐ Rural/Small Town

Type of Housing
- ☐ Garden-Style Apt
- ☐ Elevator/High Rise
- ☐ Condo
- ☐ Townhome
- ☐ Single-Family Home
- ☐ Other

Living Space/Adaptability Preferences
- ☐ Bedroom _____
- ☐ Bathroom_____
- ☐ Kitchen_____
- ☐ Laundry_____

Safety/Security:
_____
_____
_____

Neighborhood Familiarity
_____
_____
_____

Utility Needs
- ☐ Included in rent
- ☐ AC
- ☐ Gas/Electric/Oil
- ☐ Energy Assistance
- ☐ Other

Housing Options

HCVP_____
Special Purpose HCV: NED / Mainstream / HOPWA / MBQ / Other
Project-Based_____
Public Housing_____
HUD Subsidized_____
Home/TBRA (special program)_____
811_____
Weinberg_____
Other_____

Notes:

Figure 2.3: Housing Intake Form: Front and Back

Cheryl's housing coordinator used the data and information from the Initial Housing Intake to help Cheryl determine if the 811 PRA Program would be a viable option to pursue. Cheryl desired to live in an integrated setting, in a development where she would have the opportunity to interact with persons without disabilities; Cheryl wanted to pursue educational and employment opportunities and she wanted to live in an urban area, close to good transportation and shopping. Cheryl had a solid rental history—she paid her rent on time and she maintained relationships with her neighbors and landlord prior to her accident. Cheryl's housing coordinator encouraged Cheryl to consider applying for the 811 PRA Program. The Initial Housing Intake process also identified a few challenges for Cheryl—she would need to review her credit situation and work with her housing coordinator to develop strategies and approaches to convincing a potential 811 PRA Program property manager that her tenancy would not be evaluated or scored as "high" risk due to her poor credit.

A housing assessment tool can also provide system level data to include the following:

- Number of persons in need of affordable housing that your program serves
- Number of persons desiring to live in a particular location/jurisdiction that your program serves
- Number of persons requesting wheelchair accessible apartment homes that your program serves
- Number of persons requesting a specific bedroom size (1-bedroom; 2-bedroom; 3-bedroom)
- Number of persons with barriers to accessing housing that your program serves
- Number of persons seeking specific type (s) of housing preferences that your program serves
- Demographic characteristics
- Personal housing history characteristics
- Income characteristics

Collecting data and information about 811 PRA Program applicants can provide insight for developing and/or modifying case management training tailored to address a specific need, awareness of patterns and trends regarding housing need, and identifying areas for pursuing advocacy. In addition, applicant data can be used to assist 811 PRA Program partners with better determining where housing units need to be located, what types of unit characteristics

are more frequently preferred, what choices in neighborhood amenities are most commonly requested, and what kinds of barriers arise to accessing the 811 PRA Program.

The housing assessment process should also include obtaining a release of information or consent form signed by the person you will be referring to the 811 PRA Program. Each disability system and/or case management entity is encouraged to develop and use a consent form that emphasizes housing related activities.

Consent to Release Information Pertaining to Housing Status

I hereby give consent to release the following type of information regarding_____

(Name of client)

To: _____

(Service Provider Organization)

To assist with activities associated with locating, securing, or maintaining community housing. This includes information about verifying household income, verifying changes in household composition, verifying changes in affordable housing program status, assisting with requesting reasonable accommodations and reasonable modifications, inquiring about credit, criminal and personal rental history background, and reporting any other updates or changes in housing status.

_____ _____

Signature of client Date

Figure 2.4: Consent to Release Information Pertaining to Housing Status

2. How to Obtain Housing Documents

Applicants to the 811 PRA Program will be required to submit income, asset, citizenship, age and personal identification verifications and documentation. Each system will need to implement case management practices that establish processes and procedures for obtaining all necessary documentation. In general, the following documents will need to be submitted by all household members applying to live in an 811 PRA development:

Income and asset verification

- Proof of SSI/SSDI income
- Proof of pension/VA benefit
- Recent pay stubs if employed
- Recent bank and/or savings account statements

- Asset verification to include life insurance policies, retirement savings accounts, etc.

Proof of Citizenship/Age

- Birth Certificate
- Passport

Social Security Card

Government Issued Photo ID

- Drivers License
- State-issued ID

Acquiring housing documentation can be a lengthy process, especially if a person does not have basic verifications such as a birth certificate or Social Security card. **It is highly recommended that case managers begin assisting a potential 811 PRA Program applicant to acquire housing documentation at the inception of interest in the 811 PRA Program.**

When **John** expressed interest in moving from a group home into his own independent apartment, his case manager provided him with a list of required housing documentation. John reviewed the list and realized that he had not seen a copy of his birth certificate for years and John recalled that he lost his Social Security card several months ago when his wallet was stolen. John and his case manager immediately began the process of filling out an application for a new birth certificate. Thirty days later, John's birth certificate arrived and he was then able to present his birth certificate to the local Social Security Office to request a replacement Social Security card. Ten days later his Social Security card arrived in the mail. John then went to the Department of Motor Vehicles (DMV) to obtain a State-issued ID; the line was extensive so John decided to return at a later date. Three weeks later, John finally returned to the DMV and waited several hours to have his ID issued. The process to obtain a birth certificate, Social Security card, and State-issued ID took John @ 90 days to complete.

REQUIRED DOCUMENTATION FOR HOUSING

☐ **BIRTH CERTIFICATE**

Obtain a birth certificate from your state of birth. You will need to complete an application to Vital Records and a fee will be charged.

☐ **SOCIAL SECURITY CARD**

Contact a local SSA office or http://www.ssa.gov/ 1-800-772-1213 to order a replacement Social Security Card. You can also order your card in person at a local SSA office. You will need to bring a copy of your birth certificate and a govt-issued picture id. No fee will be charged.

☐ **PICTURE ID**

Attempt to obtain a govt-issued id from the Motor Vehicle Administration.

☐ **CURRENT PROOF OF INCOME**

Social Security benefits – 1-800 772-1213

Call in person and state that you are a person in a nursing home. Ask for your current Award Letter (SSI/SSDI) with your date of birth printed on the letter. Request the letter to be faxed to the nursing home. Your letter can also be ordered from the internet: www.socialsecurity.gov

VA benefits – 1-800-827-1000

PLEASE MAKE AN EFFORT TO OBTAIN THIS DOCUMENTATION AS SOON AS POSSIBLE

Figure 2.5 Required Documentation for Housing

Case managers should be familiar with knowing how to acquire housing documentation. The basic process for obtaining a birth certificate, Social Security card, government-issued ID and income verifications are as follows:

Birth Certificate

For persons born in Maryland, a birth certificate can be obtained by applying online, by mail, or same day walk-in service. An applicant is required to present unexpired government-issued photo identification.

Online Applications: An independent company, VitalChek Network, Inc. can be accessed through its website www.vitalchek.com. A fee is charged for using this service and all major credit cards are accepted. If ordering a birth certificate online, be prepared to know the following information about an applicant:

- Birth date
- Name as it appears on the birth certificate
- City/town of birth
- Biological parents names

- Mother's maiden name

Mail Application: Download an application from the DHMH website and mail the application along with photocopies of the required identification, application fee, and a self-addressed stamped envelope to the Division of Vital Records, PO Box 68760, Baltimore, Maryland 21215.

Walk-in Application: Birth certificates for individuals with valid, government-issued photo identification born in Maryland are available for same day service at the Division of Vital Records, 6550 Reisterstown Road, Baltimore, Maryland 21215. Same day service is also available at local health departments except in Montgomery County, Baltimore City and Baltimore County. Case managers can pick up a birth certificate for a client with a notarized statement granting permission.

Social Security Card
A replacement Social Security card can be ordered via mail or in person at a local Social Security Office. A person must present proof of citizenship, age, and identification and only original documents are accepted.

Citizenship - Original birth certificate or current US Passport

Age - Original birth certificate or current US Passport

Identity - Current Drivers License or State-issued ID

An application and explanation of the process can be viewed on the Social Security Administration's website (http://www.ssa.gov). There is no fee for a replacement Social Security card.

Government-Issued ID
A State-issued ID can be obtained from a local Department of Motor Vehicle (DMV) office. A person will be required to present an original birth certificate or US Passport, Social Security Card, and proof of address.

Income Verification
If a person receives SSI or SSDI or other Social Security income, an updated benefit letter can be ordered online at http://www.ssa.gov. The benefit letter is mailed to the current address on file with Social Security and is generally received within 10 business days. Case managers can pick up SSI/SSDI benefit letters from a local Social Security office with a valid Medicaid card. Asset information such as bank and savings accounts and retirement accounts is obtained directly from a person's financial institution, generally in the format of a monthly bank statement or a quarterly account statement.

3. How to Overcome Credit, Criminal, and Personal Rental History Challenges

Applicants to the 811 PRA Program will undergo a credit, personal background check and possibly a review of personal rental history to include landlord/tenant relationships, rent arrearage concerns, eviction history, and home maintenance patterns. Each privately managed 811 PRA development will have its own unique tenant screening and selection criteria. In general, property managers working with the 811 PRA Program will be looking for tenants who will pay rent consistently on time, who will treat their units with care, and who will be good neighbors.

Each disability system will need to implement case management practices that establish processes and procedures for reviewing credit, criminal and personal rental history backgrounds and for developing strategies to overcome any challenges to accessing the 811 PRA program. **It is highly recommended that case managers identify personal barriers to accessing an 811 PRA development as soon as a person expresses interest in applying for the 811 PRA Program.**

Case managers using a housing assessment tool such as the aforementioned "Initial Housing Intake" will be developing a trusting relationship with a prospective 811 PRA program applicant and will be initiating conversations about a person's credit, criminal and personal rental history. If barriers to accessing affordable housing programs are identified during this engagement process, the case manager should then work on developing strategies and practices to overcome the obstacles. In order to effectively provide solutions to credit, criminal and rental history problems, case managers should receive training and develop skills in the area of credit repair, expungement assistance, tenant screening practices, using reasonable accommodations to address problem areas, and selling the advantages of supportive services to assist a person access and retain community housing.

Case managers will also want to develop, expand and maintain connections to community resources and organizations targeting low income renters when assisting persons overcome credit, criminal or personal rental history challenges.

Credit

Credit is one of the primary factors that property managers will apply screening criteria for when considering whether or not to accept an applicant. Prospective applicants to the 811 PRA Program should be encouraged to obtain a copy of their credit report. A person has the right to obtain a free copy of their credit report once every 12 months, from each of the nationwide consumer credit reporting companies: Equifax, Experian, and TransUnion.

To request a credit report by phone: 1-877-322-8228

To request a credit report on-line: www.annualcreditreport.com

To request a credit report by mail: Annual Credit Report Request Service
PO Box 105281
Atlanta, Georgia 30348

Case managers should assist applicants to the 811 PRA Program with understanding credit scores, credit terminology, and credit reporting practices. **It is highly recommended that case managers identify credit issues as soon as a person expresses interest in applying for the 811 PRA Program.**

When **Cheryl** began the process of applying for a State Medicaid Waiver program, she met with a housing coordinator who assisted her with ordering a credit report from Equifax. When the credit report arrived, Cheryl and her housing coordinator reviewed the “Trade Lines”, “Credit Inquiries” and the “Public Record and Collection Items” on the report. Cheryl's credit report revealed under the Trade Lines that she had a non-payment for an auto loan; under Credit Inquiries she had an “involuntary” inquiry for a pre-approved credit offer; and under “Public Record and Collection Items” she had multiple outstanding hospital and medical bills being sought by a credit collection agency and an outstanding utility bill. Cheryl's housing coordinator advised Cheryl that she would be able to improve her credit by setting up a payment plan with the utility company to address her outstanding bill. Cheryl's housing coordinator also informed her that there is no quick way to get rid of credit issues, but many landlords will be more willing to work with her if she negotiates a payment plan to pay off back debts. When it came time to apply for an apartment, Cheryl and her housing coordinator explained to the property manager what happened to her credit when she unexpectedly experienced a catastrophic car accident and they also were able to demonstrate Cheryl's actions to clear up her outstanding utility bill. The property manager agreed to consider the extenuating circumstance and Cheryl's application was approved.

Community Resource Connection: Case managers advocating for persons with credit issues can contact the Consumer Credit Counseling Services of Maryland and Delaware, Inc:

www.cccs-inc.org
1-800-642-2227
757 Frederick Rd., Baltimore, MD. 21228
Fax: 410-869-8828 | info@cccs-inc.org

Action Steps to Overcome Credit Issues

Step 1: Help a person to obtain a free copy of his/her credit report.

Step 2: Help a person to understand credit information contained in his/her credit report.

- Is the information accurate?
- Is identity theft a possibility?
- What types of credit issues exist?
    - Medical bills in collection
    - Overdue credit card accounts exceeding 90 days
    - Open judgments for past due rent
    - Late/inactive loan payments –student, car, mortgage

Step 3: Help a person to determine if any of the credit issues require legal assistance or a referral to the Consumer Credit Counseling Service.

Step 4: Help a person understand what credit issues might impact a person's ability to access affordable housing.

- Outstanding utility bill
- Open judgment for past due rent

Step 5: Help a person to set up a payment plan, even if the amount is minimal.

Step 6: Help a person to identify community funding resources to assist with paying outstanding utility bills or past due rent.

Step 7: Help a person to contact his/her previous landlord to negotiate a waiver or reduction in outstanding rent.

Step 8: Determine if a person's disability or medical setback had a relationship to a person's ability to maintain timely rent payments. If so, help a person to write a letter explaining the circumstances.

Criminal

Applicants to the 811 PRA Program will be screened for two types of criminal convictions: (1) registered sex offender; (2) production of methamphetamines on federally subsidized property. These criminal convictions will result in denial to the 811 PRA Program.

Each privately managed 811 PRA development will have its own unique screening criteria regarding a person's criminal background. Generally, property managers will consider how long

ago a crime occurred, any extenuating circumstances surrounding the arrest or conviction, whether the crime has any relevance towards a prospective tenant's ability to be a good renter, and whether or not a person has actively pursued and engaged in rehabilitation efforts. **It is highly recommended that case managers identify criminal background issues as soon as a person expresses interest in applying for the 811 PRA Program.**

Case managers working with prospective applicants to the 811 PRA program should be familiar with knowing how to assist a person review their criminal record, how to assist a person with expunging a criminal record, and how to assist a person submit a reasonable accommodation request to an 811 PRA property manager to consider alternative forms of determining eligibility.

Case managers and prospective clients can access the Maryland Judiciary Case Search to view a person's public judicial case activity within the State of Maryland:
casesearch.courts.state.**md**.us

What is Maryland Judiciary Case Search?
Maryland Judiciary Case Search provides public internet access to information from case records maintained by the Maryland Judiciary. In January 2006 Phase I of Case Search was introduced to satisfy information requests commonly received in the court clerks' offices. This information includes defendant name, city and state, case number, date of birth, plaintiff name (civil cases only), trial date, charge, and case disposition.[3]

Case managers may also need to assist a person obtain a Criminal Justice Information System (CJIS) Report, especially if a person is seeking to expunge a criminal record. A CJIS Report can be obtained in person at the CJIS office:

6776 Reisterstown Road, Suite 102
Baltimore, Maryland 21215
410-764-4501

A person needs to bring a State-issued ID. A fingerprint fee and CJIS fee will be assessed.

[3] Maryland Judiciary Case Search Website, (Case Search Frequently Asked Questions (FAQs)

When **David** was informed that his State intermediary care facility was closing, he met with his family members and resource coordinator to begin planning for a move to independent housing in the community. David and his family members brought up some concerns about David's past criminal history—he had several convictions on his record for certain nuisance crimes prior to his placement in a State institution and they were not sure if his criminal record would bar him from accessing a federally funded community housing program. David's resource coordinator contacted a free legal service sponsored by the local State Law School and arranged for David to meet with a law school student who informed David about how to expunge his criminal record. David first had to obtain a copy of his Criminal Justice Information System (CJIS) Report. David then filed a Petition for Expungement and a General Waiver and Release with the assistance of the law school student. Ninety days later the court approved the request and David requested a new background check to verify that his record had been expunged. When David was ready to apply to live in an apartment in the community, the nuisance crimes that he had been convicted of several years ago did not raise a red flag during the apartment application approval process.

Community Resource Connection: Case managers advocating for persons with a criminal background record can contact the following organizations and programs for resources and support:

Civil Justice
520 W. Fayette St, Baltimore, Maryland 21201
Phone 410-706-0174 **Fax** 410-706-3196
http://www.civiljusticenetwork.org/

Legal Aid Bureau Inc.
500 East Lexington Street, Baltimore, MD 21202
www.mdlab.org

The People's Law Library of Maryland
www.peoples-law.org

Maryland Disability Law Center
1500 Union Avenue; Suite 2000, Baltimore, MD 21211
www.mdlclaw.org

Homeless Persons Representation Project (HPRP)
201 N. Charles Street, Baltimore, Maryland 21201
Phone 410-685-6589
www.hprplaw.org

Action Steps for Overcoming Criminal Background Issues

- **Step 1**: Develop a trusting relationship with a person.
- **Step 2**: Help a person to explore past activities in his/her background that may impact accessing affordable housing.
- **Step 3**: Verify that information disclosed on public judiciary information system is correct/accurate.
- **Step 4*:*** Help a person to remove open warrants and to seek legal counsel if necessary.
- **Step 5**: Help a person to understand rules and policies about criminal activity impacting housing.
  - Type of criminal activity
  - Patterns of criminal activity
  - Time period of last reported activity
- **Step 6**: Help a person determine if a change in health/medical situation had a relationship or impact on behavior causing criminal activity.
- **Step 7**: Help a person to demonstrate commitment and acceptance of rehabilitative services as he/she approaches housing providers.
- **Step 8**: Help a person to identify community supports and services to assist with supporting positive community interactions and behaviors.

Personal Rental History: 811 PRA development property managers may include rental history as part of the screening process. A basic background check generally reveals a person's previous addresses of residence, a person's rental payment history, and if a person had an eviction (s). **It is highly recommended that case managers learn about a person's rental history as soon as a person expresses interest in applying for the 811 PRA Program.**

Property managers may be interested in such questions as:

- Did the tenant provide proper notice to vacate?
- Did the tenant pay rent on time or did he/she ever receive notices for nonpayment or noncompliance?
- Did the tenant leave the unit in satisfactory condition?

Property managers may also ask a prospective applicant if they have an eviction on their record. Potential applicants to the 811 PRA Program will need to know if they have ever had a landlord file a lawsuit to evict and if they have any open judgments. The Maryland Judiciary Case Search provides public record of open judgments.

Case managers working with prospective applicants to the 811 PRA program should be familiar with knowing how to assist a person review their personal rental history to include eviction history and open judgments, how to assist a person with presenting extenuating circumstances surrounding an eviction(s), and how to assist a person submit a reasonable accommodation request to an 811 PRA property manager to consider alternative forms of determining eligibility.

When **John** expressed an interest in moving to an independent apartment, his case manager initiated a discussion with him about his previous rental history. John revealed that prior to living in a group home he had spent a year in a psychiatric facility after being evicted from his apartment. John and his case manager reviewed the Maryland Judiciary Case Search and discovered that John had an open judgment on his record—he apparently owed his last landlord several months rent and with late fees and court fees, the unpaid amount was over $3,000. John's case manager assisted John with determining a strategy that involved contacting his previous landlord to explain his situation and to request a waiver of fees. The landlord agreed to work with John and reduced the outstanding balance by 50% and the landlord provided a written statement to the credit reporting agencies regarding the agreement which included a $100 a month payment for the next 15 months. When John's name came to the top of the wait list at an apartment development, John's case manager advised him to be upfront with the property manager about his prior eviction and the open judgment. Because John was in the process of addressing his past due rent and because John would now have

access to supportive services in the community to help him maintain his health and well-being, the property manager agreed to consider the extenuating circumstances and approved his rental application. John's early and proactive approach to dealing with his eviction and his frankness about his past rental transgression provided a pathway for an opportunity to live in an integrated home.

Community Resource Connection: Case managers advocating for persons with personal rental history challenges such as an eviction record or an open judgment can contact the following organization for guidance and resources:

Baltimore Neighborhood Inc (BNI)
2530 N. Charles Street, Baltimore, MD 21218
Administration: 410-243-4468
Fair Housing: 410-243-4400
Call Center/Tenant Landlord
Hotline: 410- 243-6007
www.bni-maryland.org

Action Steps to Overcome Challenges to a Person's Rental History

- **Step 1**: Identify challenges to a person's rental history.
  - Does a person have an eviction record?
  - Did a person have trouble with paying rent on time?
  - Did a person experience difficulty getting along with neighbors?
  - Did a person maintain a safe living environment, void of:
    - Excessive clutter
    - Fire hazards
    - Pest/bug infestation
  - Did a person understand his/her tenant obligations or did they have trouble with guest/visitor policies, noise level rules, respecting property, or other lease regulations
- **Step 2**: Help a person determine if a change in a person's health/medical situation or disability had a relationship to his/her ability to be a good tenant.
- **Step 3**: Help a person to write a "story" or explanation of circumstances leading to issues with a person's ability to maintain a positive tenancy.
- **Step 4**: Help a person to realize strengths and assets as a tenant.
- **Step 5**: Help a person reach out to a previous landlord to obtain a positive reference or an agreement to understand a person's circumstances when providing a reference.
- **Step 6**: Help a person to connect to community supports and services to overcome current and future challenges to rental history.

4. How to Use Reasonable Accommodations When a Person is Applying to the 811 PRA Program

Applicants to the 811 PRA Program are persons with a disability seeking an affordable and integrated living opportunity. A ***reasonable accommodation*** can allow a person with a disability to **access** a housing opportunity with equal chance and participation as a person without a disability. Understanding how and when to request and use a reasonable accommodation is an important practice for all case managers helping a person apply for the 811 PRA Program.

A **reasonable accommodation** is a change, exception, or adjustment to a rule, policy, practice, or service that may be necessary for a person with a disability to have an equal opportunity to

use and enjoy a dwelling as codified and enforced in the Fair Housing Act.[4] Property managers will consider making exceptions, adjustments, and changes to rules, policies, and procedures to help a person with a disability **apply** to a housing development as long as the request does not impose an undue administrative or financial burden and as long as the request has a relationship to a person's disability. Reasonable accommodations provide a flexible and creative tool for assisting a person with a disability access the 811 PRA Program. Reasonable accommodations can also be used to help a person during their tenancy and to prevent an eviction. Disability systems are encouraged to provide training for case managers on the use and practice of reasonable accommodations when assisting persons with disabilities access the 811 PRA Program.

Cheryl is a person with a physical disability who requested a **reasonable accommodation** during the application process to have the property manager meet at the nursing home instead of the apartment complex to complete the initial application and interview because Cheryl was having difficulty arranging accessible transportation. In addition, Cheryl also requested a **reasonable accommodation** during the lease signing to have her case manager sign an "x" in lieu of her signature because Cheryl had difficulty gripping a pen for extended periods of time.

John is a person who has been coping with mental health issues for most of his adult life who has a history of poor neighbor relations including multiple physical and verbal altercations and disturbances. John was at first denied housing by an apartment complex due to his behavioral problems. A **reasonable accommodation** was submitted in writing to the property manager stating that John has been successfully dealing with his mental health and has access to supportive services to help him maintain good neighbor relations and that he is not likely to be involved in altercations with neighbors as a new tenant in the apartment development. John's application was reconsidered and the property manager agreed to adjust the eligibility guidelines and accepted John as a new tenant.

[4] The Fair Housing Act, 42, U.S.C. 3604 (f)(3)(B

David is a person with an intellectual and developmental disability who had never accessed credit in his life prior to applying for an apartment rental. The apartment development required all applicants to have a credit history in order to determine eligibility. David's resource coordinator assisted David with submitting a **reasonable accommodation** stating that he would be willing to identify a representative payee to pay his rent every month or he would be willing to set up an automatic rent payment arrangement with a bank to pay his rent automatically every month to the apartment development. The apartment property manager agreed to change the rule for eligibility allowing David to set up an automatic monthly payment system.

Carol is an older person with a disability who has struggled with substance abuse and homelessness for years. Carol has multiple health issues and is often in and out of the service system, with long periods of absences and has difficulty maintaining relationships with case mangers and supports because of her homelessness. When Carol's name came to the top of the wait list for an apartment unit, a letter was sent to her case manager and to Carol's last address—a rehab hospital that she discharged from several months ago. Carol's case manager could not locate her within the allotted time period to respond to the wait list update so the apartment complex began to process the next application. Carol finally surfaced one week later and her case manager quickly contacted the apartment complex and submitted a **reasonable accommodation** stating that because of Carol's disability and lack of a permanent address she did not respond to the wait list announcement and is therefore requesting to have her name reinstated on the wait list. The apartment complex agreed to accommodate the request, and luckily, the apartment unit was still available because the next applicant after Carol had turned down the apartment unit offer and Carol was next in line.

Reasonable accommodation requests should be submitted in writing. The written request should include the following:

- Name and contact information

- Self-declaration that you are a person with a disability. Do not include information about a person's disability
- Statement of the reasonable accommodation request
- Statement indicating the need for the accommodation

Property managers working with applicants for the 811 PRA Program may request information to verify a person's disability or to verify the need for the accommodation as it relates to a person's disability. Detailed information about a person's medical situation, disability classification, or other personal information should not be requested, shared, or divulged.

Examples of reasonable accommodation requests for persons **applying** for the 811 PRA Program:

- Schedule a home visit to complete the initial interview and eligibility application.
- Allow the use of an "x" in lieu of a full signature.
- Provide large print documents.
- Consider extenuating circumstances when reviewing my criminal record to include….
- Consider extenuating circumstances when reviewing my credit history to include….
- Consider extenuating circumstances when reviewing my eviction history to include…
- Allow the submittal of an alternative document to verify my Social Security number.
- Provide special services for hearing impairment.
- Allow an extended period for a move-in date while supportive services are being setup.

(Sample Request)
Reasonable Accommodation

Name: *John*_____**Date**_____

Address: 2222 Rosewood Street_____

Reasonable Accommodation: Change, exception, or adjustment to a rule, policy, practice, or service that may be necessary for a person with a disability to have an equal opportunity to use and enjoy the housing.

Dear Property Manager:

*John*_____
(client name)

This applicant is a person with a disability requesting a reasonable accommodation.

The reasonable accommodation(s) include:

Change in policy regarding poor rental history and good neighbor relations to allow for consideration of extenuating circumstances regarding previous rental history resulting in difficulty with neighbor relations.

This person needs a reasonable accommodation(s) as a result of their disability because:

During the time period when John was experiencing poor neighbor relations he did not have adequate access to supports and services and medical assistance to help him meet the obligations of his tenancy. John now has a long track record of success as a resident in a group home and he now has access to on-going supports and services to assist him with meeting his tenant obligations.

Sincerely,

_____
Case Manager Signature

Figure 2.6: Reasonable Accommodation Sample Form

5. How to Complete Eligibility Packets for an 811 PRA Development

Case managers will be responsible for assisting potential applicants for the 811 PRA Program complete an eligibility packet if a person's name comes to the top of the waiting list for an available unit. Each 811 PRA development will provide its own unique eligibility packet and will have its own set of policies and procedures for the application and screening process. Each 811 PRA development will process all applicants in a fair and consistent manner and in compliance with Fair Housing Laws.

Generally, an eligibility packet includes a rental application, an income and asset questionnaire, a credit and criminal background waiver, release of information forms, and multiple federal and/or state forms depending on the type and financing arrangement of the development. The eligibility packet can be lengthy and will require numerous signatures by the head of household and all household members over the age of 18.

All household members over the age of 18 will be required to submit standard housing documentation when submitting an eligibility packet to an 811 PRA development to include

verification of all income and assets, verification of age, verification of citizenship status, and verification of identity. Required housing documents generally include submittal of a Social Security card, birth certificate, State-issued ID, and updated/current income information.

Generally, 811 PRA developments will require a non-refundable screening fee for all household members over the age of 18 at the time of screening. The fee covers the cost of the credit and criminal background search.

Case managers and applicants to an 811 PRA development will be working closely with a property manager. Property managers are responsible for accurately determining eligibility and complying with strict federal regulations and reviews. In addition, property managers are responsible for processing eligibility packets in a timely manner in order to maintain a high occupancy rate.

The following four factors are critical to the 811 PRA eligibility packet process:

Complete: Eligibility packets need to be complete at time of submittal. Incomplete applications can be denied or returned causing delay in the approval process. A complete eligibility packet will contain all forms, applications, waivers, and releases and will have attached all required housing documentation or supplemental information.

Timely: Eligibility packets need to be submitted in a timely manner. Case managers should be working with potential applicants to obtain housing documents, obtain income and asset verifications, and to identify barriers to achieving approval and subsequent actions in place to overcome any challenges to approval as soon as a person expresses interest in the 811 PRA Program. Attempting to obtain documents or develop strategies to overcome barriers is a lengthy process. Expect most 811 PRA developments to allow for a two week eligibility packet submittal time-frame.

Accurate: Eligibility packets need to be accurate. If a signature is missed or a question on the application skipped, an application can be denied or returned causing delay in the approval process.

Honest: Eligibility packets will contain multiple questions regarding a person's income, assets, household composition, residential history, conviction and arrest record, subsidized rental history, eviction history, marital status, and other personal background inquiries. An inaccurate or false statement may be grounds for denial. Case managers will need to work closely with potential 811 PRA applicants to develop a trusting relationship and to ensure that a person understands that all information provided during the application process is kept confidential.

Failure to provide required information and/or misrepresentation of information will raise a red flag, potentially leading to denial or punishment by law.

Action Steps for Completing Eligibility Packets

- **Step 1**: Obtain eligibility packet from property manager.
- **Step 2**: Meet with applicant to complete eligibility packet.
- **Step 3**: Help applicant fully understand the importance of answering all questions correctly, accurately and honestly.
- **Step 4**: Verify that applicant has attached all required documentation—generally includes updated award letter from Social Security, recent bank statements, government-issued ID, Social Security card, birth certificate, and other asset documentation.
- **Step 5**: Review eligibility packet to check for completeness and accuracy prior to submittal.
- **Step 6**: Submit eligibility packet directly to 811 PRA property manager.
- **Step 7**: Ensure that applicant responds immediately to any inquiries or requests for additional information, documentation or clarification from property manager.

F. Case Management Core Housing Practices for 811 PRA Program Retention

Housing retention is a core component necessary for achieving successful outcomes in the 811 PRA Program. Assisting a person with complex health and social needs maintain a stable housing situation requires committed and consistent case management involvement. Each service delivery system will need to define, design and build into their case management structure a housing retention program based on a person-centered strength and asset approach and assisting both 811 PRA housing providers and tenants. Early intervention before a tenant issue evolves into a crisis such as an eviction will promote housing stability and strong relationships with 811 PRA housing providers.

1. Understanding the Importance of Being a Good Tenant

Case managers working with 811 PRA tenants will want to assist a person to achieve housing stability as soon as he/she moves into an 811 PRA unit. Providing training, education, and discussions with a new tenant about how to have a successful tenancy in an 811 PRA development will not only help a person achieve community living goals but will also preserve and enhance the 811 PRA Program for future tenants. Appropriate and immediate topics to cover with a new tenant include:

- Basic understanding of tenant lease obligations
- Basic understanding of tenant rent payment processes
- Basic understanding of good neighbor relations
- Basic understanding of how to keep a home clean and sanitary
- Basic understanding of how to use kitchen, bathroom, lighting and heating/cooling devices
- Basic understanding of how to contact maintenance staff for a home repair
- Basic understanding of how to develop a household budget

Helping a new tenant to recognize and understand the following four basic responsibilities is critical to achieving a successful 811 PRA tenancy:

- Paying rent on time
- Maintaining your apartment
- Complying with your lease
- Respecting the rights of other tenants

New tenants leasing up in an 811 PRA unit will have varying levels of experience with these responsibilities—some persons will have a solid rental history with a consistent monthly payment record and a history of positive relationships with neighbors and landlords; other persons will have had difficulty keeping up with rent payments and misunderstandings or run-ins with their former property manager or neighbor. Case managers will want to understand a person's housing history in order to help a person determine the need for accessing supports and services to assist with managing these responsibilities.

Each service system may want to develop a set of educational materials or a "Community Living Notebook" to include printed materials on tenant reminders, property manager and maintenance staff contact information, a household budget worksheet, and listings of community resources useful for helping a person maintain a positive tenancy. The notebook would be developed as a resource to be provided directly to a new tenant upon leasing an 811 PRA unit.

"How to be a Good Tenant" training is offered through the Maryland Partnership for Affordable Housing training series. It is highly recommended that case managers working with the 811 PRA Program receive this training. Go to the MDOD website (http://www.mdod.maryland.gov/) to enroll in the training.

Case managers working with the 811 PRA Program are required to provide "How to be a Good Tenant" training to prospective tenants during **three** separate intervals:

- When a person is **referred** to the 811 PRA Program
- When a person has been **approved** for an 811 PRA unit
- When a person has **moved** into an 811 PRA unit

2. Understanding the Importance of Facilitating Good Housing Relationships

New tenants in an 811 PRA development will have multiple relationships to foster and develop. These relationships can be extremely important and can substantially contribute to a successful tenancy for the persons your system serves. A new tenant in an 811 PRA development will encounter the following relationships:

- A relationship with the 811 PRA development property manager and maintenance staff
- A relationship with new neighbors, whether they live above, below, or around the corner
- A relationship with the 811 PRA Program

Property managers can play an important role in helping persons you serve achieve housing stability. A good property manager sees their role as providing a home and community rather than just an apartment for a renter. Property managers have extensive responsibilities ranging from collecting rent, to maintaining the property, to sustaining high occupancy rates, to dealing with evictions, to meeting strict and complicated federal and state compliance regulations, and numerous other responsibilities. The primary and day to day concern of a property manager is to manage and enhance the quality of life of all residents including safety and good neighbor relations.

A good property manager/tenant relationship involves a mutual understanding about meeting basic tenant obligations:

- Paying rent on time
- Keeping an apartment home healthy and clean
- Keeping an apartment home safe and free of clutter/debris
- Respecting the rights of other tenants
- Contacting maintenance staff for appropriate reasons and in a timely manner

Maintenance or custodial staff is responsible for keeping the grounds and common space areas of an apartment development safe and clean and for responding to individual tenant home repair or maintenance requests. New tenants to an 811 PRA development will need to know **who**, **how** and **when** to contact maintenance staff. Maintenance staff conducting routine repairs can identify potential safety issues or sanitary concerns at an early stage and they can also detect a change in a person's behavior or routine living patterns. Case managers may want to develop a contact form for new tenants to include:

Rental Office Contact Form

Property Manager:_____
Phone #:_____
*Monthly Rent Amount: $*_____
How will I pay my monthly rent?

- ☐ *Check*
- ☐ *Money-Order*
  - ***Always obtain a receipt for rent payment*

Where do I drop my rent payment off every month?

- ☐ *Property manager office*
- ☐ *Rent Drop Box*
- ☐ *Mail to:*_____
- ☐ *Other:*

Maintenance Staff: _____
Phone #:_____
*Plumbing and electrical repairs require immediate attention
Emergency/After-Hours Maintenance Phone #:_____

THE COORDINATING CENTER

Figure 2.7: Rental Office Contact Form

Case managers may also play a role with assisting property managers and maintenance staff with understanding the scope and intent of voluntary supportive services. Property managers and maintenance staff may **not** have knowledge and experience with independent living for persons with significant health and complex medical challenges. Property managers may desire to have general (not client specific) information about the following:

- Understanding the role and purpose of personal care attendants
  - Why are multiple persons and/or agencies sometimes providing care?
  - Why are caregivers sometimes arriving after business hours?
  - What can I do if a caregiver violates leasing policy?
  - What if I observe unsafe or inattentive care by a tenant's caregiver?
- Understanding how a person qualifies for services
- How can other tenants of our development obtain supportive services?
- Understanding how supports are funded
  - Will an 811 PRA tenant qualify for any medical cost deductions when calculating rent?

- Understanding that supports are voluntary
    - Why doesn't an 811 PRA tenant have to accept supportive services?

Case managers may play a positive and teaching role with helping property managers and maintenance staff to better understand basic disability etiquette. Disability awareness training is available through the Maryland Partnership for Affordable Housing Training series.

Communication between a property manager and case manager can also play a contributing role to the success of an 811 PRA tenancy. Case managers should take the following steps to foster a strong communication process with 811 PRA property managers:

1. Discuss with the person you are serving your role, purpose and intent in fostering a relationship with 811 PRA property manager and maintenance staff focusing on safety and health and efforts to assist with housing retention.
2. Obtain written permission/consent from the 811 PRA tenant you are serving to allow for communication with a property manager/maintenance staff to discuss housing related issues.
3. Provide a copy of the consent to the property manager.
4. Provide your contact information.

Property managers of 811 PRA developments are expecting **consistent, timely**, and **responsive** communication interaction with case managers. The most important action a case manager can provide to support a positive relationship with 811 PRA property manager staff is to be available and to respond quickly in the event of a tenancy issue or a health/safety concern. The following is an example of a contact/consent form that can be used in the 811 PRA Program by case managers and property managers:

THE COORDINATING CENTER
INSPIRED SOLUTIONS

LANDLORD/SERVICE PROVIDER CONTACT FORM

Client Name: _____

Service Provider Organization: _____

Contact Person: _____ Phone Number: _____

Email: _____

Consent to Release Information Pertaining to Housing Status

I hereby give consent to release the following type of information regarding_____

(Name of client)

to:_____

(Service Provider Organization)

To assist with activities associated with locating, securing, or maintaining community housing to include information about verifying household income, verifying changes in household composition, verifying changes in affordable housing program status, assisting with requesting reasonable accommodations and reasonable modifications, and reporting any other updates or changes in housing status. Please check all that apply:

☐ Emergency	☐ Eviction	☐ Late Payment of rent
☐ Recertification	☐ Landlord/Tenant Relations	☐ Income Verification
☐ Unit Modifications	☐ Lease Violations	☐ Reasonable Accommodations
☐ Move	☐ Good Neighbor Relations	☐ Change in lease/rent/house rules

_____ _____

Signature of client Date

Figure 2.8: Landlord/Service Provider Contact Form

A new tenant is a new neighbor. Neighbors may live next door, upstairs or across the hallway. Neighbors will be encountered in the lobby, parking lot, elevators or hallways. Respectful relationships with neighbors can contribute to housing stability. Excessive noise, encounters that make other tenants feel unsafe or threatened, or poor housekeeping or hygiene can have a negative impact on neighbors that can precipitate complaints and property manager involvement.

Good neighbor relations also include taking full responsibility for guests. As with any tenant, tenants in an 811 PRA development are responsible for the behavior and actions of their friends and family members while visiting in a person's home or enjoying the use of the apartment development premises.

A new tenant in the 811 PRA Program must also understand that he/she is a participant in a federally funded program providing an affordable and integrated housing opportunity, involving a relationship to the obligations and intent of the 811 PRA Program. Tenants need to be aware of the program obligations including annual recertification requirements, annual inspection requirements, annual reporting requirements and the interface with case management in a voluntary supportive services program.

3. Understanding Basic Confidentiality and Information Exchanges

Case managers working with 811 PRA tenants will want to have a clear understanding about what types of information and documentation can be shared about an 811 PRA Program applicant and participant. Each disability system will need to have a model for information sharing and confidentiality protocols.

Case managers will be exchanging information with property managers, maintenance staff, and other 811 PRA program personnel during the referral, access and retention phases of an individual's tenancy. Some of this information may be confidential and personal. All 811 PRA applicants and participants should know what information about them is being shared, who is receiving the information and why the information needs to be shared.

Clinical and diagnostic information should **not** be disclosed to housing providers. Property managers or other housing personnel should **not** be asking for information about a person's ability to live independently, information about a person's disability or disability classification, or information about a person's medical or clinical diagnosis. The federal Fair Housing Act protects the privacy rights of persons with disabilities.

4. Understanding How to Use Reasonable Accommodations to Support Housing Retention

A **reasonable accommodation** can allow a person with a disability to **retain** a housing opportunity with equal chance and participation as a person without a disability. Understanding how and when to request and use a reasonable accommodation is an important practice for all case managers helping a person retain housing in the 811 PRA Program.

A **reasonable accommodation** is a change, exception, or adjustment to a rule, policy, practice, or service that may be necessary for a person with a disability to have an equal opportunity to use and enjoy a dwelling as codified and enforced in the Fair Housing Act.[5] Property managers will consider making exceptions, adjustments, and changes to rules, policies, and procedures to help a person with a disability **retain** their housing as long as the request does not impose an undue administrative or financial burden and as long as the request has a nexus to a person's disability. Reasonable accommodations provide a flexible and creative tool for assisting a person with a disability to retain community housing. Disability systems are encouraged to provide training for case managers on the use and practice of reasonable accommodations when assisting persons with disabilities access and retain housing in the 811 PRA Program.

[5] The Fair Housing Act, 42, U.S.C. 3604 (f)(3)(B)

Reasonable accommodation requests should be submitted in writing. The written request should include the following:

- Name and contact information
- Self-declaration that you are a person with a disability
- Statement of the reasonable accommodation request
- Statement indicating the need for the accommodation

Property managers working with applicants for the 811 PRA Program may request information to verify a person's disability or to verify the need for the accommodation as it relates to a person's disability. Detailed information about a person's medical situation, disability classification, or other personal information should not be requested, shared or divulged.

Cheryl, John, David and Carol requested reasonable accommodations to help them retain their housing:

Cheryl chose to use a Personal Emergency Response System (PERS) when she moved from a nursing home to the community to help her reduce reliance on personal care attendants and as an added measure of safety when she was alone in her apartment. Two weeks after moving in to her new apartment, Cheryl accidently and unknowingly set off the PERS alarm, causing an emergency response team to arrive at her front door. The emergency responders banged on Cheryl's door as she was sleeping. The emergency responders followed protocol, knocking the door down to enter the apartment only to find Cheryl safe and sound asleep. The expense to repair the door damage was extensive. Cheryl's service coordinator suggested that she place a lockbox on her door with a key so that emergency responders could enter when needed. The apartment complex did not allow lockboxes or any exterior object to be placed on apartment doors. Cheryl submitted a reasonable accommodation request asking for a change in policy to allow the placement of the lockbox.

John experienced a difficult period in his life after living in his apartment for six months causing a change in his behavior and his ability to retain his housing. The property manager at John's apartment received several complaints about John's behavior, and in fact, several tenants accused John of physically threatening them. The property manager attempted to meet with John to discuss the allegations, but John continually avoided any contact. The direct threat to other tenants in the building concerned the property manager and was grounds for an eviction. John's case manager met with John and discovered that John had recently been prescribed some new medications that caused unpleasant side effects so John decided to stop taking all of his medications, which then led to struggles with managing his behavior. John's case manager quickly coordinated an immediate appointment with John's doctor to determine a different medical approach. John agreed to access additional supports including medication monitoring and attending a support group. A reasonable accommodation was granted and it was determined that as long as John was receiving services to reduce the risk of threatening behavior, he would not be evicted.

Carol has a history of detachment and difficulty relating to many of her supportive services professionals. Carol was reluctant to have a personal care attendant remind her on a daily basis about taking medications which she could self administer and Carol often felt lonely and isolated. Carol's case manager introduced the idea of a service animal to Carol to help with her therapeutically and also to assist with reminding Carol to take her medications. Carol took interest in this idea but when she mentioned to the property manager that she might be getting a trained service dog, the property manager reminded Carol about the no pet policy. A reasonable accommodation was requested and Carol was granted permission to allow a service dog to live with her that was trained to bark as a reminder to Carol to take her medication and the dog also served as a companion for Carol.

5. Understanding How to Use Reasonable Modifications to Support Housing Retention

A reasonable modification is a physical or structural modification that is made to allow persons with a disability to fully use and enjoy their rental home including the surrounding common

space areas and facilities. Housing providers are required to allow persons with disabilities to make a modification to their unit as long as the modification is structurally feasible, but generally the cost of the modification is made at the tenant's expense. Reasonable modifications typically include installing a ramp for a person in a wheelchair, installing grab bars in a bathroom or removing a bathroom cabinet.

Most 811 PRA developments will be designed and constructed to meet the following Fair Housing standards:

In covered multifamily housing consisting of four or more units with an elevator built for first occupancy after **March 13, 1991**, all units must comply with the following seven design and construction requirements:

a. Accessible Entrance on an Accessible Route
b. Accessible Public and Common-Use Areas
c. Usable Doors
d. Accessible Route Into and Through the Dwelling Unit
e. Accessible light switches, Electrical Outlets, Thermostats, and Environmental Controls
f. Reinforced Walls in Bathrooms
g. Usable Kitchens and Bathrooms

If a building does not have an elevator, all of the **ground floor units** in the building must be accessible. In rare instances, sites may have steep terrain or unusual characteristics that make it impractical for some units to be made accessible.[6]

Is a unit "handicap accessible," "barrier free," or "wheelchair accessible?" Answers to this question will vary, depending on the specific development, a property manager's interpretation of accessibility, and the unique needs of the person you are serving. A standard definition of an "accessible" unit does not exist. Some 811 PRA developments will have "handicap" accessible units available that do not offer any features beyond the 7 above mentioned design requirements. Some 811 PRA developments will offer a "handicap accessible" unit that has a roll in shower and lowered kitchen cabinets for a person in a wheelchair. Case managers working with 811 PRA tenants will want to work with an individual to explore how to adapt a unit to increase independence or provide greater safety.

If a tenant living in an 811 PRA unit determines that a physical, mechanical, or structural change would increase the safety and enjoyment of their home, a reasonable modification request can

[6] (Design and Construction Elements of the Fair Housing Act)

be submitted. Case managers may need to identify financial resources to pay for the modification. The 811 PRA apartment development is not legally obligated to cover the cost of the construction but may be willing to contribute some or all of the cost.

Reasonable modifications requests should be submitted in writing. The written request should include the following:

- Name and contact information
- Self-declaration that you are a person with a disability
- Statement of the reasonable modification request
- Statement indicating the need for the accommodation

The following is an example of a reasonable modification request form:

REASONABLE MODIFICATION REQUEST

Name_____ **Date**_____

Apartment Development:_____

Address_____

Reasonable Modification: Alteration to the physical structure of the housing unit or overall property that is necessary for a person with a disability to fully use and enjoy the housing.

Dear Property Manager:

_____
(client name)
This tenant is a person with a disability requesting a modification to their apartment so that they can have the full use and enjoyment of their home.

The modification (s) include:

Please respond in writing to this request for a *reasonable modification* within ten (10) business days. Please include the following information:

- ☐ **Statement of approval and statement of any conditions to approval**
- ☐ **Statement of any required documentation**
- ☐ **Contact information for site engineer or person (s) responsible for monitoring and approving modification plan**

COMAR 10.09.55.18 (C): "If the owner [of the home or place or residence] is not the participant, environmental accessibility adaptations may be made only if approved by the owner of the home, who agrees that the participant will be allowed to remain in the residence for at least a year".

Sincerely,

_____
Service Coordinator Signature

Figure 2.9: Reasonable Modification Request Form

Cheryl is a person in a wheelchair living in high rise elevator building that was recently constructed with the seven accessibility design features as required under the Fair Housing Act. Cheryl's apartment home has enough space for her to independently maneuver in her wheelchair—she has full turning radius in the bathroom and she has access to the building's community room and other common spaces. However, Cheryl was having difficulty getting her wheelchair to move over the speed bumps in the parking lot, causing wear and tear to her wheelchair. Cheryl requested a reasonable modification to have the apartment development remove a ¼ section of each speed bump to allow Cheryl's wheelchair to freely pass through the parking lot. The apartment development agreed to the modification and offered to pay for the full cost of removing the sections of speed bumps.

6. How to Develop a Housing Backup Plan

Participants in the 811 PRA Program are persons with complex health and social needs with incomes below 30% of the AMI. Affording rent at this income level is not achievable without some kind of rental subsidy. Remember that the rental subsidy in an 811 PRA unit is attached to the unit, not to the individual. If a person chooses to move out of an 811 PRA unit, is evicted, or has a medical setback leading to a long-term hospitalization or institutionalization, they will be responsible for paying market rent or for connecting to a new rental subsidy program or development. Without a rental subsidy, a person may face the difficult circumstance of homelessness or institutionalization.

Case managers working with 811 PRA tenants will want to develop and use a **housing backup plan** in the event a person's 811 PRA tenancy is terminated, does not meet expectations, or a person experiences a medical setback requiring extended hospitalization and/or institutionalization. A housing backup plan will provide an alternative housing option if an **unexpected** or **unanticipated** lease termination occurs. A housing backup plan should include the following actions:

1. Educate, inform and provide resources to help an individual determine alternative affordable housing in a community of their choice prior to signing an 811 PRA unit lease.

2. If the Housing Choice Voucher Program (HCVP) wait list is open in the jurisdiction of residence, place a person's name on the list and track and monitor movement on the

list. If a person's name comes to the top of the HCVP wait list while they are residing in an 811 PRA unit, a person should pursue HCVP eligibility and use the voucher in the 811 PRA unit. The person's rental subsidy will change from a project-based subsidy to a HCVP subsidy providing mobility for the individual and opening up a new 811 PRA subsidy for another prospective tenant.

3. Assist an individual with determining one or two alternative affordable housing options and submit an application for the wait list. Monitor and track the application status for the duration of a person's 811 PRA tenancy.

7. How to Exit a Housing Program

Long-term stable housing for persons with low incomes and with significant and complex health and social needs is an intended and achievable goal of the 811 PRA Program. However, all tenancies will end at some point. Persons who have successfully leased in an 811 PRA development may exit the program for many reasons, some beyond the control of an individual. Persons who have met the obligations of tenancy in the 811 PRA Program for a period of time may encounter a medical, health or personal change, preventing the continuance of a successful tenancy, even with the placement of added supports and services. Some persons may struggle from the beginning of their tenancy with paying rent on time or complying with certain lease stipulations, and they will be asked to end their tenancies. Others will involuntary be terminated and will no longer be eligible to access a federally supported affordable housing program for a given period of time and in some cases permanently. Case managers need to be prepared to address any of these possibilities when working with a tenant in an 811 PRA unit.

Each 811 PRA development will have its own policies and procedures regarding ending a tenancy and vacating a unit. In general, case managers will want to ensure that the following occurs when a person is ending an 811 PRA tenancy:

- Informing property manager in writing 60 days in advance
- Verify that rent and utility payments are current
- Coordinate logistics of removing all personal belongings, furniture, and household items
- Ensure that the apartment is left in a satisfactory sanitary condition
- KEYS—ensure that the property manager has possession of the keys on the last day of tenancy

- Documenting and reporting reason/circumstances of tenancy termination for the 811 PRA Program

If an 811 PRA tenant is exiting an 811 PRA unit due to an eviction or lease violation, case managers will want to make sure that a tenant has knowledge and access to eviction counseling and/or legal counseling. The following community resources are available to assist with eviction and lease violation issues:

Baltimore Neighborhood Inc (BNI)
2530 N. Charles Street, Baltimore, MD 21218
Administration: 410-243-4468
Fair Housing: 410-243-4400
Call Center / Tenant Landlord Hotline: 410-243-6007
www.bni-maryland.org

Legal Aid Bureau Inc.
500 East Lexington Street, Baltimore, MD 21202
www.mdlab.org

In the event that a person is exiting an 811 PRA tenancy due to non-voluntary terms, case managers will need to coordinate placement in an alternative living situation. If a person is seeking another affordable housing option in the community, exiting the 811 PRA Program on the best terms possible will provide quicker placement. If a mutual agreement can take place between a tenant and a property manager to vacate a unit within a short period of time to avoid a record of eviction, this option should be pursued. If temporary housing placement is needed the Maryland Department of Human Resources maintains a county listing of shelters: http://www.dhr.state.md.us/transit/pdf/homelist.pdf

Proactive case management efforts and intervention strategies to prevent evictions for tenants residing in an 811 PRA unit are discussed in **Section IV: Housing Retention Process**. Case managers and their respective disability systems should be prepared to assist persons safely exit an 811 PRA tenancy, regardless of the circumstances or reasons.

8. Record Keeping and Documentation of Case Management Activities

Documenting and recording case management and client activities related to helping a person access the 811 PRA Program and to retaining housing in an 811 PRA unit will promote and support successful 811 PRA Program outcomes. Each disability system will have its own policies and procedures regarding the amount and type of information documented and the frequency

of documentation. In addition, information and data reflecting 811 PRA Program characteristics and requirements will be useful for program evaluation.

This manual has introduced several housing assessment tools that can be used to capture important program data, individual demographic characteristics and identification of challenges to program access and retention to include:

- Housing Assessment Tool
- Housing Readiness Checklist
- Environmental Assessment Tool

Disability systems may want to think about including documentation and information about interventions and services and supports requested.

Developing clear and consistent documentation procedures, policies and practices will demonstrate and reveal:

- Patterns of effective interventions for housing access and retention
- Patterns of effective supports and services for housing access and retention
- Consistent service delivery to account for staff turnover
- System-level accomplishments and areas in need of improvement

II. Appendix

Maryland Partnership for Affordable Housing (MPAH) Training Series

The MPAH maintains a cross-disability training series to prepare case managers for the 811 PRA Program. The MDOD website **www.mdod.maryland.gov** provides a calendar of 811 PRA training events and a training registry. Case managers are highly recommended to enroll in the 811 PRA Training Series and are also encouraged to periodically visit the MDOD website for training updates and announcements. The following training modules are available through MPAH:

- 811 PRA Training for Case Managers*
    - Outreach/Referral
    - Access
    - Retention
- Person Centered Planning for Housing Needs
- Disability Sensitivity Training
- How to be a Good Tenant Training**
- Reasonable Accommodation Training

*Case managers are **required t**o receive this training prior to referring any clients to the 811 PRA Program.
Applicants and participants in the 811 PRA Program are **required to receive this training.

Community Resources
Maryland Housing and Disability Services Resource Guide
The purpose of this guide is to provide general information about organizations that provide services and/or housing resources to people with disabilities. The guide is meant to be an easy to-use resource for directing people with disabilities to possible resources or to help answer questions and concerns that may come up as a result of a particular situation with a consumer

with disabilities seeking housing. The Resource Guide is divided into four parts: general information about programs that provide services to people with disabilities, general information about affordable housing resources, At-A-Glance Quick Reference Guides that contain program and funding information and a county-by-county directory of contact information for organizations that provide assistance to people with disabilities. The Guide intended to help people identify a starting point for accessing information, and therefore is not an exhaustive list of all possible services and resources that may be available to Maryland citizens with disabilities.

There are many support groups, organizations and resources that may assist persons with disabilities far beyond those listed in this guidebook. The Resource Guide is available on the internet at http://resourcefinder.kennedykrieger.org.

Consumer Advocacy Resources for Addressing Credit, Criminal, and Personal Rental History

Consumers Credit Counseling Services
1-800-642-2227
www.cccs-inc.org

Civil Justice
520 W. Fayette St.
Baltimore, MD 21201
Phone 410-706 0174
Fax 410-706 3196
http://www.civiljusticenetwork.org/

Legal Aid Bureau Inc.
500 East Lexington Street
Baltimore, MD 21202
www.mdlab.org

Maryland Disability Law Center
1500 Union Avenue; Suite 2000
Baltimore, MD 21211
www.mdlclaw.org

Homeless Persons Representation Project (HPRP)
201 N. Charles Street
Baltimore, Maryland 21201
410-685-6589
www.hprplaw.org

Baltimore Neighborhood Inc (BNI)
2530 N. Charles Street
Baltimore, MD 21218
Administration: 410-243-4468
Fair Housing: 410-243-4400
Call Center / Tenant Landlord Hotline: 410-243-6007
www.bni-maryland.org

Suggested Forms for 811 PRA Program Access
The following forms can be downloaded from The Coordinating Center website: www.coordinatingcenter.org

- Initial Housing Intake Form
- Consent to Release Information Form
- Landlord/Service Provider Contact Form
- Housing Document Checklist Form
- Rental Office Contact Form
- Property Manager/Maintenance Staff Contact Sheet for Tenants
- Reasonable Accommodation Request Form
- Reasonable Modification Request Form

III. Applicant Process

This section of the manual is designed to guide you, the case manager, through a typical applicant process for accessing the 811 PRA Program. Beginning with outreach and ending with securing a unit, case managers will be working closely with persons exploring an opportunity to live in an integrated affordable housing community. Each step along the way plays an important role in helping a person achieve his/her community living aspirations. In addition, multiple 811 PRA Program partners have invested time and effort to establish an efficient and equitable applicant system. A brief explanation on each required process is followed by a short explanation of steps, actions or recommendations for case managers to employ in an effort to secure an 811 PRA unit for a person. The explanations and recommendations are constructed to help you keep the person you are serving central to the 811 PRA applicant process.

A. Outreach and Education

Outreach and education is the first step in the 811 PRA applicant process. An effective **outreach** program identifies potential applicants for the 811 PRA Program and an effective **education** program informs potential applicants about eligibility requirements, program and tenant obligations, and unit locations and descriptions, all in an effort to help a person determine if the 811 PRA Program is appropriate for them.

Case managers need to complete these process steps:

1. **Identify persons with a disability that your system serves meeting the target population criteria**

   Are you serving persons who desire to live in an integrated and independent apartment home that meets one of these criteria?

- Currently lives in an institution and is applying for or is eligible for Medicaid HCBS
- Living in the community but at risk for institutionalization
- DDA Community Pathways Waiver participants and Mental Hygiene (MHA) Residential Rehabilitation Program participants moving from group homes or Alternate Living Units (ALUs) to less restrictive settings

- Homeless persons who are recipients of Medicaid

2. Verify that a person meets all of the threshold criteria for the 811 PRA Program

- A person with a disability
- Between the age of 18-62[7]
- Receiving SSI/SSDI income or other income at or below 30% of AMI
- Access to voluntary Medicaid services and supports

3. Provide education and information about the 811 PRA Program to persons meeting threshold criteria

- Program referral and eligibility process
- Project-based units /locations/amenities
- Tenant and program participant obligations
- Voluntary supportive services

4. Enter Outreach activity into the "811 PRA Outreach Information System"

The 811 PRA Outreach Information System is a tracking tool that relies on input from case managers conducting outreach and education to potential 811 PRA applicants. Case managers will be responsible for contributing information about the type of outreach activities pursued, number of outreach activities conducted in each county jurisdiction, and demographic data. The purpose of the tracking system is to provide an evaluation mechanism for 811 PRA Program managers to better assist case managers with outreach efforts and to ensure that the 811 PRA Program has broad reach and access for all persons meeting the target population and threshold criteria for the 811 PRA Program.

Case managers may want to develop an 811 PRA Program marketing flyer for potential applicants that describes the 811 PRA Program including how to access the program, general eligibility qualifications, unit descriptions, and other basic program facts and information.

[7] A person must be under the age of 62 at lease signing to be eligible for the 811 PRA Program. If a person is turning 62 within the next 3-6 months, a case manager may want to consider providing other housing resources or options instead of the 811 PRA program. Check the Maryland Housing Search website (www.mdhousingsearch.org) for affordable senior housing listings.

Case managers may also want to become familiar with the Maryland Housing Search website: www.mdhousingsearch.org. All 811 PRA Program developments will be listed on this website providing unit descriptions, layouts, development amenities, and other useful information to help a person determine if the 811 PRA Program meets their needs and preferences.

Case managers are encouraged to conduct site visits to the 811 PRA developments. The more first-hand knowledge you have about 811 PRA developments from unit layouts to building amenities to the surrounding neighborhood resources and amenities, the better you can inform the persons you are serving.

B. Conduct a Housing Assessment

Conducting a comprehensive housing assessment is the next step in the 811 PRA Program application process. **Section II, Case Management and the 811 PRA Program, E-1, "How to Conduct a Housing Assessment"** provides a more detailed look into the housing assessment process. An effective 811 PRA Program housing assessment helps a person determine the following:

- What are my strengths and assets that will contribute to a successful 811 PRA tenancy?
- What are my challenges?
- What are my community living goals?
- Does the 811 PRA Program meet my goals and preferences for community living?

A comprehensive housing assessment will need to include functional data and information necessary to process the referral step of the 811 PRA Program. This data includes:

- Full Name
- Birth date
- Social Security Number
- Accessibility Needs
- Household Size/# of bedrooms
- Determination of 811 PRA Priority Population Category
- County (s) that a person is willing to live in

- Verification of SSI/SSDI or other income source (s) including amount

Case managers working with persons who meet the 811 PRA target population criteria and threshold criteria will use a comprehensive housing assessment to help a person determine if the 811 PRA Program is appropriate for them and if so, what strategies and actions need to take place in order for a person to access the program. The assessment process should identify individual strengths and assets along with any personal challenges such as credit, criminal, or personal rental history issues.

If a person decides that the 811 PRA Program does not meet their preferences or needs, case managers should be prepared to provide information and resources on other subsidized housing programs such as the Housing Choice Voucher Program, public housing opportunities, special purpose voucher programs, HUD Multi-family subsidized developments or other local or state-wide affordable housing options.

Case managers may want to review **Section II, E-1, "How to Conduct a Housing Assessment"** for a more specific explanation of the housing assessment process.

Case managers are encouraged to participate in the "Person-Centered Planning for Housing Needs" curriculum training. Visit the MDOD website www.mdod.maryland.gov to enroll in training.

Case managers may also want to become familiar with the Maryland Housing Search website: www.mdhousingsearch.org. All 811 PRA Program developments will be listed on this website providing unit descriptions, layouts, development amenities, and other useful information to help a person determine if the 811 PRA Program meets their needs and preferences.

C. Applicant Referral

The third step in the 811 PRA Program application process is to submit a referral to the **Maryland Department of Disabilities (MDOD) 811 PRA Referral System.** The MDOD system verifies that a person has met basic program eligibility criteria and then moves the submittal to the actual waitlist for an 811 PRA unit. If you are a first time user of the MDOD 811 PRA Referral System, you will be required to obtain a users ID from **Social Serve, Inc**, a private non-profit housing locater entity responsible for the technical construction and maintenance of the 811 PRA Program Referral System. Your user ID is required each time you access the system.

The process for obtaining a user ID from **Social Serve, Inc** is as follows:

- Call the Social Serve toll-free #: **1-877-496-4954**
- Call between 8:30 a.m.-5:00 p.m. EDT, Monday-Friday.
- If all lines are busy you will be asked to leave your contact information and someone will return your call.
- You will be asked to supply information on your organization then you will be given a user ID and password to access the Social Serve System.

The process for accessing the referral system to submit a person's name onto the waitlist for the 811 PRA Program is as follows:

- Go to the MDOD website: www.mdod.maryland.gov.
- Click onto the 811 PRA Program. MDOD provides current updates, announcements, and general information about the 811 PRA Program.
- Click onto the Maryland Partnership for Affordable Housing link.
- Log-on to your account using your user ID and password.
- When you log-in the waitlist for the first time, you will not have any clients on the 811 PRA Program wait list.
- Select "Prescreen Applicant for 811 PRA" from the menu bar for the initial screening. Answer the questions and continue. The following prescreening questions are asked:
    - DOB
    - Household Income
    - SSI/SSDI status
    - Household Size
    - Sex Offender status and
    - Conviction status of Methamphetamine possession on PHA property
    - Which County (s) applicant is interested in living in?
- It will be determined if the applicant is eligible to apply for an 811 PRA unit in the county (s) in which they are interested in living in and you will be provided those results.
- Remember that an applicant must have income at or below 30% of AMI in order to be eligible and an applicant must be between the age of 18- 62. If the criteria are not met, the system will immediately inform you.
- If the applicant is not eligible to apply, you will be provided housing links to other affordable housing options in their interested counties.

- If they are eligible, select the "Continue with Application Process" button to enter additional applicant information and to move the applicant to the actual wait list.
- Complete all of the questions in the required fields to include:

Personal Data

- Name
- DOB
- Mailing address and physical address
- Phone # and email address (s)
- Verification of Medicaid status and Medicaid #
- Ethnicity and Race
- Military Service status

Housing Needs/Preferences

- Accessibility
- Elevator building
- Unit size (0 bedroom, 1 bedroom, 2 bedroom, 3 bedroom, 4 bedroom)
- What counties is a person willing to live in?

Household Information and Income Information

- Household members (name, gender, income, DOB, relationship to applicant)
- Live-in-Aide requested
- Service Animal
- Applicant Income (SSI/SSDI; earned income, unemployment, Veterans Disability, TANF, Workers Comp, General Assistance (GA), Social Security, VA pension, child support, alimony)

Current Living Situation

- Institutionalized
  - Nursing facility
  - Psychiatric hospital
  - State residential center
  - Chronic hospital
- Alternative Living Unit (ALU) or group home
- MHA Residential Rehabilitation Program (RRP)
- Homeless: Literally homeless: living on the street, in an emergency shelter, in a tent, in a place not meant for human habitation
- Homeless: Imminent Risk of Homelessness: Living with friends/family but will lose shelter within 14 days; received a foreclosure or eviction notice
- Other

The Maryland Department of Disabilities maintains the wait list for the 811 PRA Program and will be responsible for contacting the applicant and the case manager when a person reaches the top of the referral waiting list for an available unit. **Step # 5, Applicant and Unit Notification**, explains the notification process.

Case managers will want to ensure that they obtain all of the required information to enter into the 811 PRA Program Referral system during their initial contacts with a potential 811 PRA Program applicant. This can occur during the Outreach and Education step or during the Housing Assessment step.

D. Waitlist Period

The waitlist period for the 811 PRA Program is a critical time frame for case managers to engage in housing readiness activities to help a person meet eligibility requirements and to work on any impediments to the application process. Case managers will be expected to assist persons who have applied to live in an 811 PRA unit to overcome or minimize credit, criminal, or personal rental history challenges, to obtain all necessary housing documents, to identify funds for an application fee, security deposit and moving expenses, and to incorporate service plan options and community resource referrals to help a person successfully access the 811 PRA Program. Engagement in housing readiness activities **must** begin as soon as a person states intent to pursue living in an 811 PRA unit.

The 811 PRA Program Referral system is designed to assist case managers with initiating immediate efforts to begin helping a person obtain housing documents, overcome challenges to being approved for an affordable housing program, and to begin determining and verifying eligibility for supports and services. The length of time on the 811 PRA waitlist is difficult to determine for an individual applicant due to a number of factors from when units will come under contract for the program to the number of applicants in a specific county who are classified as a higher priority applicant. The critical factor is to immediately begin to help prepare an applicant for accessing the program, regardless of where they are on the waiting list.

Case managers are expected to assist persons who have submitted a referral for the 811 PRA Program with the following housing related activities:

Obtaining Housing Documentation

- Birth certificate
- Social Security card
- Govt-issued ID
- Verification of income and assets

Refer to **Section II, Case Management and the 811 PRA Program, E-2, "How to Obtain Housing Documents."**

Overcoming Credit Challenges

- Ordering a credit report
- Referral to CCCS
- Setting up payment plans

Refer to **Section II, Case Management and the 811 PRA Program, E-3, "How to Overcome Credit, Criminal and Personal Rental Challenges."**

Addressing Criminal Background Issues

- Expungement
- Obtaining CCJS

Refer to **Section II, Case Management and the 811 PRA Program, E-3, "How to Overcome Credit, Criminal and Personal Rental Challenges."**

Addressing Personal Rental History Challenges

- Eviction History
- Open judgments for past due rent
- Outstanding utility bills

Refer to **Section II, Case Management and the 811 PRA Program, E-3, "How to Overcome Credit, Criminal and Personal Rental Challenges."**

Case managers are expected to assist persons who have submitted a referral to the 811 PRA Program with identifying resources for an application fee, security deposit, and moving expenses.

Application Fee—the application fee is determined by each separate 811 PRA development and is generally required for every adult applicant. The fee covers the cost of a credit check and background check and it is non-refundable. The fee is submitted when an applicant turns in the eligibility packet, at the beginning of the approval process for an 811 PRA unit. Expect the fee to range from $25-35 per adult household member.

Security Deposit—the security deposit amount is determined by each separate 811 PRA development, not to exceed $50 for 811 PRA participants.

Identifying funds for a security deposit can be a lengthy process. It is highly recommended that case managers begin to help a person identify funds as soon as a referral has been submitted. Possible sources for security deposits include local DSS offices, faith-based organizations, community based organizations, and other non-profit community housing and services providers.

Each 811 PRA development has its own policy regarding **pets**. Some 811 PRA developments may have limitations on the size and type of pet (s) permitted to reside on the premises. 811 PRA developments may charge a pet deposit fee, not to exceed $300 for an 811 PRA participant.

Moving expenses include the cost of moving household furniture, clothing, and other belongings as well as the cost and time to unpack and acquire basic household essentials. Case managers will need to assist a person with coordinating the moving effort with family, friends, or other informal supports and to also engage volunteer community organizations to assist with the actual move or the donation of essential household goods. Each local community will have its own set of unique resources ranging from faith-based organizations, local Department of Social Services, community service groups such as the Lyons Club, Boys Club, or Rotary Club and numerous other possibilities.

Refer to the **Maryland Housing and Disability Resources Guide** for a list of possible community resources funding moving expenses, security deposits and application fees.

The wait list period for applicants to the 811 PRA Program is a crucial time period for ensuring that a person has a solid opportunity to gain access to an 811 PRA apartment unit. Case managers play an integral role in assuring that a person meets 811 PRA Program eligibility requirements. Your assistance with helping a person obtain all of the necessary documents, with providing strategies and efforts to overcome any personal challenges to accessing the 811 PRA Program, and with identifying potential community resources to access the program guarantees that the person you are serving has the optimal chance of living in an 811 PRA apartment unit.

E. Applicant and Unit Notification

The unit and applicant notification step in the 811 PRA Program is an acute phase requiring swift action and response from applicants and case managers. 811 PRA developments and their respective property managers operate in a dynamic and competitive market place with the goal

of maximizing unit occupancy rates. The notification step relies on efficient and expedient responses and requests for information, documentation, application submittals, and any requested follow up. Case managers will want to fully understand the steps and requirements for notifying an applicant about the availability of a unit, the timeframes in which to submit all required application materials and documents, and the expectations of 811 PRA property managers throughout the notification process.

The applicant and unit notification system is designed to assist case managers with initiating immediate efforts to begin helping a person obtain housing documents, overcome challenges to being approved for an affordable housing program, and to begin determining and verifying eligibility for supports and services. The length of time on the 811 PRA waitlist is difficult to determine for an individual applicant due to a number of factors from when units will come under contract for the program to the number of applicants in a specific county who are classified as a higher priority applicant. The critical factor is to immediately begin to help prepare an applicant for accessing the program, regardless of where they are on the waiting list.

811 PRA developments are one of three types:

- Existing development—occupied units under lease
- Newly constructed development—vacant units
- Newly rehabbed development—vacant units

Each type of development has the following unit notification time-frame:

- Existing/turnover unit……. 60 days/2 months
- Newly constructed…… 180 days/6 months
- Newly Rehabbed……180 days/6 months

Property managers are responsible for notifying the **MDOD 811 PRA Program Referral** system when an 811 PRA Program unit is available for a new applicant to apply to live in the unit. Existing developments have units that are under lease by tenants. When a current tenant provides a standard 60-day notice to vacate an 811 PRA unit, the property manager is required to immediately notify MDOD to announce the availability. Newly constructed and newly rehabbed developments are processing applications for vacant units with the goal of achieving full occupancy by the final date of construction. Property managers will begin accepting applications six months in advance of building opening for newly constructed and rehabbed 811 PRA Program units and will therefore notify the **MDOD 811 PRA Program Referral** system six

months prior to unit occupancy. Once a newly constructed or newly rehabbed development is fully occupied, it becomes an existing 811 PRA development and converts to the 60-day/two-month unit notification time-frame for any unit turnovers.

Once MDOD has been informed that an 811 PRA unit is available the applicant notification process is the following:

1. **MDOD identifies five applicants from the MDOD 811 PRA Program Referral system who have stated intent to live in the county of unit availability based on priority population status and date/time of the application referral.** For example, if a unit becomes available in Montgomery County, the system will first check for the names of all persons who selected Montgomery County as a jurisdiction that they would be willing to live in. If there are 50 persons in the referral system and 10 selected Montgomery County, the system will then sort those 10 applicants by priority population status. Of the 10 wait list referrals in Montgomery County, four persons are living in nursing homes with access to a Medicaid HCBS Waiver, two persons are living in the community in substandard housing and at risk of institutionalization, two persons are desiring to move from a group home to independent community living, and one person is homeless. The five identified applicants are the four persons living in a nursing home and 1 person living in substandard housing at risk of institutionalization who submitted a referral ahead of the other person who also is living in substandard housing.
2. **Within <u>seven</u> business days, MDOD sends a letter to each of the five identified applicants and their respective case manager announcing the availability of an 811 PRA unit.**
3. **Applicants or their case managers <u>must</u> send an email or call MDOD within <u>10</u> business days of receipt of the letter stating intention to pursue eligibility for the available 811 PRA unit**. Intent to pursue means that a person meets the following:
    - Is ready to transition and move to a new home within 60 days for existing/turnover units, including verified eligibility for Medicaid HCBS.
    - Is ready to transition and move to a new home within 180 days for newly constructed/rehabbed units, or possibly earlier depending on construction schedule. The eligibility process for HCBS has been initiated.
    - Has acquired standard housing documentation for all household members

A person may choose not to accept the opportunity to apply for eligibility for an available 811 PRA unit. If a person opts to pass on an offer to apply for an available 811 PRA unit, his/her name will be placed back on the 811 PRA wait list. If a person refuses **3** opportunities to apply for eligibility for an available 811 PRA unit, his/her name will be removed from the 811 PRA wait list. Case managers should assist potential 811 PRA applicants with determining which 811 PRA developments meet needs and preferences as soon as a person's name is placed on the wait list in order to minimize non-acceptance of unit offers.

4. **MDOD continues to work off of the 811 PRA referral wait list until 5 applicants identified by county preference and priority population status have sent an email or called MDOD to state intent to pursue eligibility to live in an 811 PRA unit.** For example, if only 3 persons respond to MDOD within 10 business days, 2 more persons will be sent letters from MDOD announcing unit availability and requesting a response within 10 business days.
5. **MDOD sends the Property Manager the names and contact information for the 5 applicants who have responded in priority population order.** If the unit is an existing development or a unit turnover, the 5 names are forwarded 3 weeks in advance of unit availability. If the unit is located in a newly constructed or newly rehabbed development, the names are forwarded 2 months/60 days in advance of unit availability.
6. **Property managers forward the development specific eligibility packet to the 5 identified persons or to their respective case managers.** Case managers may need to pick up the eligibility packets directly from the property manager or a property manager may require a person to complete the eligibility packet in person.

F. Eligibility Process

The eligibility process is a crucial phase relying on consistent case management involvement to help guide a person through the process of submitting a complete, accurate, and honest eligibility packet for the 811 PRA Program. Refer to **Section II, Case Management and the 811 PRA Program, E-5**, "**How to Complete Eligibility Packets for an 811 PRA Development"** for more in-depth guidance and information.

Case managers will need to familiarize themselves with the unique procedures and processes for each 811 PRA development. Application materials, forms, and verification documents may differ from development to development. The eligibility process involves the following steps:

- Property manager notifies the five selected applicants and/or their respective case managers regarding the process and procedures for completing the eligibility packet. Some property managers will request an in-person interview to complete the eligibility packet and others may allow the packet to be picked up and hand-delivered to the applicant and then returned. Some property managers may agree to mail the eligibility packet. Use a reasonable accommodation if the person you are working with needs additional support or assistance or a change in procedures allowing them to complete the eligibility packet in a timely manner.

- Expect eligibility packets to be completed within 10 business days. This includes the submittal of all necessary documents and income/asset verifications and the application fee.

- Property managers will process the eligibility packets in priority population order and within seven business days.

- If additional information or missing information is requested, respond immediately. Case managers may need to be prepared to hand-deliver documents, pick up forms, or drop off completed paperwork during the eligibility process.

- The first eligibility packet to be processed is the applicant who falls into the highest priority population category and whose 811 PRA referral was submitted on the earliest date. If this applicant's eligibility packet is fully approved and the applicant meets all of the 811 PRA development's screening and selection criteria, the processing ends. If this applicant is not approved, the next eligibility packet will be processed according to priority population status and date/time stamp until an approved application is attained.

- Applicants whose eligibility packets were not processed will be re-instated on the MDOD 811 PRA Referral System at their original date/time place. MDOD is responsible for ensuring that a person's name is returned to the referral list.

If an applicant is denied by an 811 PRA development an **adverse action** notice is sent to the applicant if the information that warranted the denial came from a consumer report such as a credit report or a tenant verification service. Case managers should be familiar with how to assist a person review an adverse action letter and how to contact the consumer agency that provided the information about the person. Persons may be subject to false or inaccurate consumer reporting so follow up is necessary to verify the accuracy of the report. The 811 PRA property manager will not know what information has been reported by the consumer agency—this is private information and can only be requested by the affected individual.

A person whose application has been denied by an 811 PRA development can request to have their name placed back on the 811 PRA waitlist at the original date/time place. Case managers may be requested to assist with verifying the reason for denial by the MDOD 811 PRA Referral

System staff. Case managers are expected to assist a person overcome reason(s) for denial and to refer a person to community resources if the denial is based on circumstances preventing a future 811 PRA Program approval such as an open warrant or open judgments.

By this stage in the 811 PRA applicant process, case managers should be fully engaged with the service plan process and transition planning process. Case managers will also want to verify eligibility for Medicaid HCBS supports and services and complete any final coordination to ensure access to voluntary supportive services.

G. Securing Housing

Securing housing is the final step in the application process for the 811 PRA Program. Case managers play an integral role in this last step to assisting a person access an 811 PRA unit from coordinating the move, to finalizing a person's plan of services, to attending the lease signing, and to conducting tenant training. Case managers may want to refer to **Section II, Case Management and the 811 PRA Program, F 1-8** for more in-depth information and recommendations on how to assist a person achieve a stable tenancy. **Section IV, Housing Retention Process** also provides additional advice and guidance on helping a person get off to a good start with his/her 811 PRA tenancy.

The last step in the applicant process—securing housing—can be a very stressful time period for a person transitioning from a nursing home, from an unstable housing situation, from a group home or from the streets. Case managers are encouraged to have a basic understanding of the leasing process in order to help the persons you serve have the best opportunity to begin a stable tenancy in an 811 PRA home. Case managers are encouraged to understand and/or execute the following:

- Determining a rent payment plan
- Pre-lease tenant obligations
    - Setting up utilities
    - Verifying the amount of the security deposit and first month's rent
    - Determining home modification needs for immediate safety
    - Renters Insurance
- Lease signing process

- Coordinate lease signing date
- Request a reasonable accommodation if necessary
- Attend lease signing

Case managers are encouraged to understand basic lease provisions to include:

- **Term of the lease:** Lease terms for the 811 PRA Program are 12 months in duration. A new lease will be signed every 12 months and an annual recertification will be conducted.
- **Amount of monthly rent:** Rent payment terms are stated on the lease to include the amount of the tenant monthly rent and the contract rent, the date rent is due, late fees for paying rent after the due date, and how and where rent is to be paid. Cash is never accepted for rent; expect rent to be paid by check or money order. Some leases may state a grace period of two to three days for paying rent—this does not mean the rent is due on the grace date; rent is always due on the stated date found on the lease, generally the first of the month. 811 PRA tenants should keep a receipt for all rent transactions.
- **Utilities and appliances:** Lease states which utilities are supplied by the owner and which utilities a tenant is responsible for; lease states which appliances are supplied by the owner and which appliances a tenant is responsible for.
- **Notice period for termination of tenancy:** Lease states the notice period for when a tenant must submit in writing that they will not be renewing their lease or will be ending their tenancy. If an 811 PRA tenant chooses not to renew their lease, a 60 day advance written notification stating intent to move must be submitted to the property manager.
- **Additional charges:** Additional charges will be noted on the lease for such things as lost keys, after hours lock out service, guest fees for using amenities such as a fitness room or swimming pool, etc.

The lease will also include an explanation or declaration of all policies and procedures regarding a person's tenancy. Case managers are highly encouraged to help a new tenant understand the provisions of his/her lease. Property managers will explain the lease provisions during the lease signing and will answer questions to ensure a tenant has a solid understanding of his/her obligations to the agreement. Each 811 PRA development will have its own unique lease and its own set of policies and procedures.

If a person needs a change in policy and/or procedures to assist with the lease signing process, remember to use a **reasonable accommodation** request. Some persons may need the following:

- Special formatting, hearing or visual aids, or verbal interpretations for literacy differences
- Using an "X" in lieu of a full signature

- Allowing a family member, friend, case manager or other support person to sign the lease paperwork
- Moving the lease signing to a more accessible room or location

A need for a reasonable accommodation may also be discovered as a person reads through and comprehends some of the lease provisions. For example:

- The lease states that trash must be emptied into a closed dumpster that cannot be opened by a person in a wheelchair.
- The lease states that mail is to be delivered to curbside mailboxes that are not reachable by a person in a wheelchair
- The lease states that rent payments must be submitted in person; the person you serve is not comfortable with face-to-face interactions due to a mental health diagnosis
- The lease states that a fee is required for all non-tenants to access the swimming pool area; the person you serve has a care attendant who will be accompanying him/her to the pool.

Setting up Utility Service

Case managers working with the 811 PRA Program will be expected to know how to assist an 811 PRA participant set up utility service and how to assist an 811 PRA tenant with managing monthly energy bills.

Each 811 PRA development will have its own policy, process and timeline for how and when utilities need to be set up by a new tenant. Power and gas are the two main utilities that may require a new tenant to establish service in his/her own name. Power and gas includes electrical service, heating and cooling and cooking services. Phone, internet and cable services are generally not included as part of an 811 PRA apartment development rent. Phone, internet and cable services can sometimes be bundled by one carrier or may require a separate service arrangement and account. Case managers may want to assist an 811 PRA tenant by providing a list of carriers.

The two main utility service providers in Maryland are Baltimore Gas and Electric (BGE) and Potomac Electric Power Company (PEPCO). BGE provides electric and gas service to the Baltimore Metropolitan region including Baltimore City, Baltimore County, Anne Arundel County, Howard County, and Harford County. PEPCO provides electrical service to customers in Montgomery and Prince George's County. Accounts can be set up by calling a customer service representative or completing an on-line application.

PEPCO (202) 833-7500
BGE (800) 685-0123

When an 811 PRA applicant has been approved for a unit and a lease signing date has been established, the applicant should contact the utility company to set up an account for services. When contacting a utility company, an 811 PRA applicant should be prepared to answer a few basic questions:

- Is this first time you have set up an account with this utility provider?
- When was the last time you established an account with a utility provider? Where?
- What is the effective date of new service?
- Is the service currently on at the new address?

When establishing new service, a person will be asked to provide his/her Social Security number in order to run a credit check. If a person does not have an established utility history, credit history, or has a poor credit history, a security deposit may be required. After a utility account has been set up, an account number is provided to the new tenant and the utilities are now in that person's name.

Case managers are **required** to submit the 811 PRA Program Contact Form during the lease signing:

811 PRA PROGRAM CONTACT FORM

TENANT INFORMATION

Tenant Name	
Address	
Apt #	
Zip	
Phone	
Cell	
Emergency Contact Name	
Phone-Day	
Cell	
Notes	

SERVICE PROVIDER INFORMATION

Service Provider Name	
Address	
City	
Zip	
Phone	
CASE MANAGER NAME	
Phone	
Notes	

MFP HOUSING DIRECTOR: JENNIFER MILES
410-767-6832 (office) 410-303-1253 (cell)

Figure 3.1: 811 PRA Program Contact Form

This form must be updated or resubmitted if a case manager has been reassigned to an 811 PRA tenant. Submit a copy of the updated form to the 811 PRA property manager. The form is located on the MDOD website: www.mdod.md.gov.

During the final step of securing an 811 PRA rental home, case managers are **required** to provide tenant training. Case managers must complete the MPAH "How to be a Good Tenant" training. Go to the MDOD website: www.mdod.md.gov to enroll in the training. The training provides guidelines and information on tenant rights and responsibilities, reasonable accommodations and reasonable modifications, use and care of a unit, and financial responsibilities.

IV. Housing Retention Process

This section of the manual is designed to provide you, the case manager, with knowledge and skills to pro-actively support stable tenancies for 811 PRA Program participants. Case managers are responsible for understanding the factors that support sustainable tenancies for persons with significant disabilities and extremely low incomes, including implementing early intervention practices. Case managers play a critical role not only in the achievement of desired 811 PRA Program outcomes such as high retention rates, but also in enriching the satisfaction a person has about his/her home and community life. Housing retention involves a multi-faceted array of creative, flexible and individualized service planning and support efforts contributing to housing stability for an 811 PRA tenant, as well as opportunities for a person to develop positive relationships, opportunities for self-expression, and personal freedom and privacy, all within a safe and suitable physical home and community environment.

Case managers can refer to **Section II, Case Management and the 811 PRA Program, F 1-7, "Case Management Core Housing Practices for 811 PRA Program Retention"** for additional information on how to design a housing retention program.

Case managers can support successful 811 PRA tenancies by developing strong person-centered engagement skills, acquiring broad and in-depth knowledge about community resources, pursuing a willingness to connect persons to supports and services, and understanding that a person has the right to make their own choices and to accept the consequences of their choices.

The key **tenant** factors that promote positive tenancies are:

- Paying rent on time
- Maintaining the unit
- Engaging in friendly neighbor relationships
- Complying with the terms of the lease
- Finding satisfaction and comfort with home and community

A key **case management** factor that supports a successful tenancy is the ability of case managers to identify issues or potential problems at an early stage and to implement effective intervention strategies as soon as possible.

Housing retention efforts have three critical time phases:

1. First 30-60 days of tenancy
2. Month two to six of tenancy
3. Six months and beyond of tenancy

A. First 30-60 Days of Tenancy

During the first **30-60** days of a person's new tenancy in an 811 PRA unit, a case manager will want to focus on the following housing retention efforts:

Good Communication: Establishing good communication from the first day of tenancy benefits the entire 811 PRA housing community. Discuss how you will communicate with a person living in an 811 PRA unit. Personal communication—face-to-face, in home, and/or phone contact—is highly effective, especially if a person's tenancy is at risk.

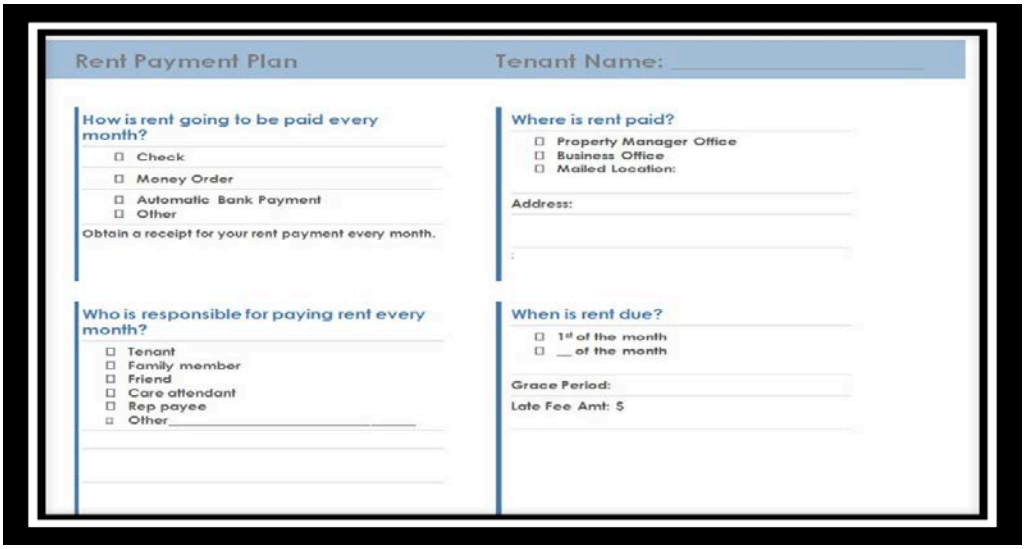
Understanding tenant responsibilities: Helping a new 811 PRA tenant understand basic tenant responsibilities—paying rent on time, maintaining a unit, and having positive neighbor relationships—is an ongoing process that needs to be initiated prior to a person moving into the unit and frequently revisited during the first 30-60 days of tenancy. This includes understanding the basic rules, regulations and procedures spelled out in a person's lease.

Understanding a tenant's right to privacy: Helping a new 811 PRA tenant understand basic privacy rights and confidentiality rights can be crucial to a successful tenancy. Case managers must not reveal a person's personal information without the person's written consent unless a threat to safety or life is at risk. 811 PRA apartment development staff cannot enter a person's home without prior consent unless life or safety of others is at risk.

Facilitating Relationships: Introducing a new 811 PRA tenant to the property management staff, maintenance and custodial staff and other persons in the immediate housing community needs to occur during the first month of tenancy. These relationships are vital to supporting a good tenant experience.

When **Cheryl** moved into her new unit, her service coordinator was there to meet her to ensure that furniture was delivered, ample food was available, and that Cheryl had access to basic household supplies as well as ensuring that Cheryl's medical and health services were in place. Cheryl and her service coordinator agreed to meet again in two days, after Cheryl had a chance to get a little more settled. Two days later, Cheryl had multiple concerns—she was having trouble maneuvering her new electric wheelchair in the elevator and Cheryl was concerned that she was damaging her apartment; she did not remember where her trash was to be disposed; she was worried about how she would get out of the building in case of a fire; and she was confused about not recognizing the person answering phones in the property manager's office. Cheryl's service coordinator set up a meeting with the property manager and maintenance staff the very next day—Cheryl was introduced to all of the building staff, from the property manager to the custodial staff to the receptionist. The following week, Cheryl's service coordinator spoke to Cheryl who reported that she was on a first name basis with the maintenance staff personnel, and that “Charlie” had suggested that she install bumper pads on the wall corners in her apartment to minimize damages or marks from her wheelchair.

Establishing a rent payment plan: Setting up an agreed upon rent payment plan should be initiated prior to lease signing and fully implemented within the first 30 days of a person’s tenancy. The rent payment plan should include the following:



Rent Payment Plan

Tenant Name: _____

How is rent going to be paid every month?

- ☐ Check
- ☐ Money Order
- ☐ Automatic Bank Payment
- ☐ Other

Obtain a receipt for your rent payment every month.

Where is rent paid?

- ☐ Property Manager Office
- ☐ Business Office
- ☐ Mailed Location:

Address:

Who is responsible for paying rent every month?

- ☐ Tenant
- ☐ Family member
- ☐ Friend
- ☐ Care attendant
- ☐ Rep payee
- ☐ Other_____

When is rent due?

- ☐ 1st of the month
- ☐ __ of the month

Grace Period:

Late Fee Amt: $

Figure 4.1: Rent Payment Plan Sample Form

Completing a housing backup plan: Completing a **housing backup plan** with a new 811 PRA tenant should be conducted within the first 60 days of tenancy. A housing backup plan will provide an alternative housing option if an **unexpected** or **unanticipated** lease termination occurs. A housing backup plan should include the following actions:

1. Educate, inform and provide resources to help an individual determine alternative affordable housing in a community of their choice

2. If the Housing Choice Voucher Program (HCVP) wait list is open in the jurisdiction of residence, place a person's name on the list and track and monitor movement on the list.

   If a person's name comes to the top of the HCVP wait list while they are residing in an 811 PRA unit, a person should pursue HCVP eligibility and use the voucher in the current unit of residence. The person's rental subsidy will change from a project-based subsidy to a HCVP subsidy providing mobility for the individual and opening up a new 811 PRA subsidy for another prospective tenant.

3. Assist an individual with determining one or two alternative affordable housing options and submit an application for the wait list. Monitor and track the application status for the duration of a person's 811 PRA tenancy.

Applying for Energy Assistance

There are a number of options available to low income persons in Maryland who need assistance with managing monthly energy bills, including programs providing financial assistance and tips for reducing energy consumption. Case managers should be familiar with the following programs:

OHEP: Office of Home Energy Programs (OHEP)

- MEAP: Maryland Energy Assistance Program
- EUSP: Electrical Universal Service Program
- USPP: Utility Service Protection Program

Maryland Fuel Fund

The Office of Home Energy Programs (OHEP) administers programs that provide financial assistance to assist low-income residents with heating and electricity bills. OHEP programs are federally funded and require the submission of annual applications. Every county in Maryland

and Baltimore City has one or more OHEP office (s) where an application for energy assistance is submitted, reviewed and approved or denied. These locations are listed on the Maryland Department of Human Resources (DHR) website (www.dhr.state.md.us).

OHEP assistance is offered in the form of a grant and do not have to be paid back. Grant amounts will vary based on a household's income and by fuel type. Grant payments are disbursed directly to a utility company or fuel supplier on behalf of the person in need.

The Maryland Energy Assistance Program (MEAP) provides assistance grants to help low income persons with home heating bills. The Electric Universal Service Program (EUSP) provides assistance to help with electricity bills. The Utility Service Protection Program (USPP) provides utility turn-off protection for low income families. Participation in the USPP requires a year-round even monthly budget billing. Case managers should inform 811 PRA tenants about these programs and assist a person with the energy assistance application process.

A case manager can become familiar with the OHEP application process by visiting the DHR website (www.dhr.state.md.us). Case managers should understand the following information about how to assist a person apply for energy assistance:

- OHEP is a year round program. A person can apply any time during the year. A person must re-apply each fiscal year (July-June). Case managers may want to track the renewal date for an 811 PRA tenant.
- A person does not need a turn-off notice or be off service to apply. Case managers will want to assist a person apply within 30-60 days of moving into an 811 PRA unit.
- Applications for energy assistance can be submitted in person or by mail. Begin by calling the local OHEP office in the area where a person lives in an 811 PRA development. A person can apply on-line at www.marylandsail.org.
- A person applying for energy assistance will need the following documents:
    - Photo id
    - Proof of residence (lease)
    - Social Security card for all household members
    - Proof of income for all household members
    - Most recent utility bill

The Fuel Fund is a program that helps low income families to pay their energy bills after they have received help from OHEP. The Fuel Fund pays a portion of a person's outstanding bill. An 811 PRA tenant will be eligible to apply for Fuel Fund assistance if:

- A person qualifies for assistance from OHEP. An applicant must first apply for MEAP/ESUP.
- A person has a turn-off notice for gas or electric service
- A person has not received help from the Fuel Fund in the past 12 months

Case managers can visit the Fuel Fund website for updated information on how to apply for assistance. www.fuelfundmaryland.org

B. Month Two to Six of Tenancy

During the next two to six months of a person's new 811 PRA tenancy, case managers will want to focus on the following housing retention efforts:

Establishing home visit protocols: Case managers will need to work with the person they are serving to determine the duration and frequency of home visits needed to support a person to achieve housing stability. Home visits may be more frequent during the first few months of a person's tenancy and some persons may need additional time and support during the first several months in a new 811 PRA unit.

Carol had a difficult time transitioning from street life to a permanent housing situation. Carol's case manager recognized that the adjustment from streets to housing was a significant lifestyle change for Carol, especially when establishing routines and setting up consistent supportive services. Carol's case manager provided intensive care coordination during the first 90 days of Carol's tenancy—ranging from helping Carol facilitate new neighbor relationships to setting up a system to pay her rent on time to helping Carol orient herself to her new home and neighborhood, all above and beyond coordinating Carol's mental health, substance abuse counseling, and medical supports and services. Carol's case manager met with Carol almost on a daily basis during the first month of her move, gradually reducing the number of face-to-face interactions to once a week by day 90 of her tenancy. Carol's case manager entity was flexible and responsive—meeting the more intensive needs of Carol's particular situation, and adjusting staffing time and caseload to achieve the intended outcome of stabilizing Carol in her new permanent home.

Supporting Personal Skill Development: Case managers will want to support a person to gain the necessary personal skills to achieve housing stability during the first several months of tenancy. These skills include continuing the good communication practices that were initiated

during the first 60 days of moving into a new 811 PRA unit and basic home maintenance practices including cleanliness and keeping a home free of safety/fire hazards.

Supporting Relationship Skill Development: Case managers will want to support relationship building during the first several months of a person's tenancy in an 811 PRA unit to include facilitating connections to friends and family and the development of positive interactions with new neighbors.

John is a person who has had a difficult time establishing friendships outside of his mental health circles. John's case manager recognized the need for John to form new friendships as soon as John moved into his new integrated apartment community. John's case manager encouraged John to reach out to his mental health providers to help him with developing skills to meet new people. After living in his apartment for 4 months, John began to informally meet many of his new neighbors, sometimes just brief encounters in the hallway or the laundry room, and eventually one of those brief encounters developed into a close friendship. Now, during every home visit or phone contact, John's case manager finds ways to acknowledge or mention the new friend. This person has been instrumental in helping John feel connected to his new apartment community and gaining housing stability.

Linking to Community Resources: Case managers will want to evaluate the need for helping a person connect to community resources to support housing stability. This evaluation should be on-going, adapting to a person's changing needs and preferences as he/she achieves housing stability. New concerns, challenges, or unanticipated needs may surface after only a few months of tenancy. These linkages can include health, community, and recreational interests, but may also be needed to address an immediate issue area.

C. Six Months and Beyond of Tenancy

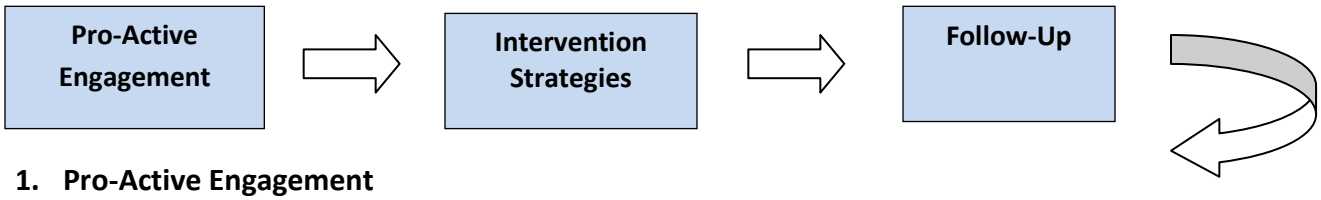
The 811 PRA Program requires case managers to be involved with on-going housing retention efforts for the duration of tenancy. The critical case management practice supporting successful tenancies is the ability to identify issues or potential problems at an early stage and to implement effective intervention strategies in a timely manner.

Early intervention can prevent conflicts and crisis that disrupt a person's ability to achieve and maintain housing stability. Embedding housing retention efforts into normal case management practices and thinking includes:

- Identifying potential stress areas of housing stability
  - Is a person consistently stressed during the end of the month when funds are low?
  - Is a person having difficulty interacting informally with other tenants in common areas such as hallways, laundry rooms, or community room spaces?
  - Is a person's unit experiencing a change in condition from excessive clutter, unclean surfaces, exposed trash/debris, general decline in cleanliness?
- Identifying changes in behavior
  - Sometimes recognized by property manager and maintenance staff
  - Is a person neglecting his/her personal hygiene?
  - Is a person staying inside his/her apartment for prolonged periods?
  - Has a person's daily routines or habits significantly changed?
- Intervening sooner rather than later
  - Early recognition of potential issues or problem areas coupled with immediate intervention increases the potential for preventing an escalation leading to a crisis.
- Assessing Interventions
  - Learning why a problem surfaced, identifying the warning sign (s), and evaluating what interventions worked and what ones did not will help case managers to improve housing retention efforts that achieve and maintain stable housing for persons living in 811 PRA units.

Each service system will have its respective guidelines and practices for addressing safety, substance abuse, mental health, and medical emergencies. Policies and procedures for including pro-active and early identification of habits, behaviors, or actions impacting housing stability—paying rent on time, maintaining a unit, and respecting neighbors—need to be incorporated into case management practices when providing supports and services for 811 PRA tenants.

Housing retention is an on-going process that begins prior to leasing an 811 PRA unit and continues until a person safely exits the 811 PRA Program. On-going housing retention efforts generally involve a three step process:



1. Pro-Active Engagement

Case managers can support a person to achieve and maintain housing stability through a pro-active engagement process that includes interactions, questions, and observations that focus on a person's satisfaction with their living arrangement and their ability to meet basic tenant obligations:

- Paying rent on time
- Keeping unit healthy and safe
- Complying with lease
- Interacting with neighbors and property management staff in a positive manner

811 PRA Home Assessment Tool for Housing Stability

Case managers may want to develop an assessment tool based on early identification of issue areas and clear and consistent communication with tenants. The assessment is conducted during home visits and should be designed to address the three tenant obligations: paying rent on time, maintaining one's home, and good neighbor relations. Use standard criteria to assess the safety and health of units and ask questions that may help a person recognize any potential areas of concern affecting housing stability.

Example of a Home Assessment Questionnaire targeting housing stability:

Housing Stability Questionnaire

THE COORDINATING CENTER

Rent Payments	Yes	No		Comments/Actions
Are you paying your rent on time every month?	☐	☐		
Have you had to pay any late fees?	☐	☐		
Has your income changed?	☐	☐		
Have you paid your utility bills?	☐	☐		
Have you received any turn-off notices?	☐	☐		
Unit Health				
Does the unit appear to have excessive clutter?	☐	☐		
Is the unit showing signs of excessive distress?	☐	☐		
Does the kitchen area have unclean surfaces?	☐	☐		
Any evidence of rodent/vermin infestation?	☐	☐		
Any visible fire/safety hazards?	☐	☐		
Any new household members?	☐	☐		
Tenant Health and Safety				
Have you had any negative interactions with neighbors, other tenants, or property management staff such as complaints?	☐	☐		
Any changes in behavior affecting risk of housing stability? • Substance Abuse • Physical Illness • Personal Appearance • Medication Changes • Stress/Life Event • Other	☐ ☐ ☐ ☐ ☐ ☐ ☐	☐ ☐ ☐ ☐ ☐ ☐ ☐		
Tenant Satisfaction				
Are you satisfied with your home? Do you enjoy your community?	☐	☐		

Service Coordinator:_____Date_____

Figure 4.2: Housing Stability Questionnaire Sample Form

2. Intervention Strategies

Case managers must be prepared to intervene immediately if any indicators are present leading to potential problems with a person's ability to maintain housing stability. Crises cannot always be avoided, but case managers can pro-actively identify problems and work with a person to prevent escalation or reduce any negative effects. Early intervention will increase the potential to resolve the conflict and avoid a crisis. If a person would benefit from a change in policy or procedures to better allow them to achieve and maintain housing stability, always consider using a reasonable accommodation. See ***Section II, Case Management and the 811 PRA Program, F-4, "How to Use Reasonable Accommodations to Support Housing Retention."***

Successful intervention steps include placing the person with a tenancy concern at the center of the process. This involves:

- Asking the person if they think they might need help
- Asking the person if they have someone in their circle of support that they want to include
- Asking if they have been in a similar situation in the past, and what they found most helpful in resolving the situation
- Asking how long they might need to fix the situation
- Encouraging the person to suggest their own strategies for fixing the problem

Identifying Problems and Providing Supportive Interventions

Paying Rent on Time

- Are you paying your rent on time every month?
- Are you paying the full amount of tenant rent every month?
- Have you had to pay any late fees?
- Are your utility bills current?
- Have you received any turn-off notices?

If a person is experiencing difficulty paying rent on time, early intervention will avoid late fees, reduce tension with a property manager, minimize undue stress for a tenant, and avoid a possible eviction and credit judgment.

Intervention steps include:

Help a person to determine reason(s) for late payment

- Life event causing unexpected financial expenditures
- Change in income
- Conflicting priorities
- Rent calculation error/unanticipated late fees or late fee error
- High utility bills
- Change in payment method

- Other

Facilitate communication with property manager and tenant

- Encourage a person experiencing difficulty with keeping up with rent payments to talk to the property manager

Help a person to develop rent arrange payment plan

- Requires mutual agreement between property manager and tenant
- Must be in writing
- Determine appropriate amount within the shortest time-frame to pay past due rent and any associated late fees; always ask if late fees can be waived
- Ensure that tenant understands the terms and commitments of the payment plan
- Provide any necessary follow-up; suggest a monthly contact reminder

Coordinate community resource referrals to assist person with resolving household financial issues to avoid future late payments and to help a person maintain housing stability

- Budget workshops
- Independent living skills development
- Peer mentoring

When **John** moved into his new apartment his income included SSI benefits and income from a part-time job, totaling the maximum SSI community benefit of $700 a month. John's rent was based on his income—he paid $150 a month for rent and $80 a month for utilities, which did not exceed more than 30% of his monthly income. John started to have difficulty paying his rent on time, he received several late notice fees and was now a full month behind with his rent payments. During a home visit, John's case manager asked John if he was current with his rent payments and John revealed that he was very stressed because he had not been able to keep up with the rent and now his utility bill was also in arrears. John disclosed that he was no longer working part-time. John's case manager assisted John with reporting his change in income to the property manager and with acquiring the documentation to verify the change. The property manager recalculated John's rent based on his current SSI income and he was

now able to afford his rent and utility payments. John was advised to report back to the property manager if his SSI benefit increased due to the job loss or if he returned to earning income from a job.

Unit Health

- Excessive clutter and failure to discard items
- Significant distress/wear and tear to unit
- Unclean food area surfaces
- Rodent/vermin infestation noticeable
- Fire safety hazards

Property managers must ensure that all units in an 811 PRA development meet health, safety, building and fire code standards. Recognizing unit health and safety violations at an early stage will help 811 PRA tenants to avoid potentially life-threatening or dangerous situations, reduce tension with a property manager, minimize undue stress for a tenant, and avoid a possible eviction.

A unit that is at risk of health violations is one that is unclean to the point of creating a health or fire hazard, is occupied by unauthorized persons, or is subject to illegal/criminal activities inside, outside, or on the premises of the development.

Visible indicators of unit health and safety concerns include:

Tenant-Caused Damage

- Holes in walls or floors
- Broken windows, doors
- Appliances missing or dismantled

Fire Hazards

- Excessive clutter around stove, vents, or heaters
- Excessive clutter blocking entrance/exit ways to unit
- Excessive clutter causing inaccessibility or injury to a person

- Burned/blackened pots on stove
- Cigarette burns on carpet, bedding, drapes or other areas of home

Health Hazards

- Presence of spoiled/rotten food in open areas
- Presence of excessive urine smells/soiled areas/stains
- Evidence of pest/vermin infestation
- Overflowing toilet/presence of fecal matter/bathroom flooding
- Excessive mold/mildew

Intervention steps include:

- Determine if situation is a crisis
- Is tenant at high risk of health/safety danger?
- Flammable items near ignition sources
- Blocked exit doorways
- Unsanitary conditions imposing immediate health risk
- Unlawful criminal activity such as drug manufacturing/distribution

If the situation is a crisis, contact appropriate authorities to immediately resolve fire/safety issues or safety issues affecting tenant or other tenants of the building.

- Help a person to determine reason (s) for unit condition
    - Sudden or unexpected health change
    - Life event causing change in behavior/ability to be independent
    - Lack of in-home supports or insufficient supports to meet person's needs
    - Exacerbation of a mental health condition
    - Other
- Work with tenant to develop a plan
    - Discuss in person condition of the unit
    - Determine expectations of what needs to be cleared or cleaned including time-frames

- Encourage tenant to ask for help from family/friends
- Develop immediate steps to address any safety/fire issues
- Set up follow-up inspection (s) schedule based on seriousness of violations and condition of the unit

- Coordinate community resource referrals to assist person with long-term strategies for improving unit health and safety.

When **Carol'**s case manager visited Carol during a quarterly home visit, the case manager noticed that the carpet in the living room had several cigarette burns and that the curtains appeared to have burn marks. Carol's case manager was concerned about the fire hazard and about the potential lease violation—the apartment complex had a no smoking policy inside units. Carol's case manager suggested that Carol review the lease policy regarding smoking. Carol and her case manager then discussed how to resolve the concern. Carol stated that she was not planning on quitting smoking anytime soon but would agree to identify an alternative place to smoke, outside of her unit. Carol's case manager stressed the fire hazard concern and they both agreed to identify community supports to help Carol with controlling her smoking. In the meantime, Carol agreed to use a smoking vest if she was experiencing difficulty controlling her urge to smoke while inside her apartment home. Carol felt that she would be able to control her smoking urge after 2-3 weeks of developing a new outdoor smoking routine.

Tenant Health and Safety and Lease Compliance

- Have you had positive/negative interactions with neighbors, other tenants or property management staff?
- Have you received any complaints?
- Any changes in behavior affecting risk of housing stability
    - Substance abuse
    - Physical illness
    - Personal appearance
    - Medication changes
    - Stress/life event changes

Property managers are responsible for ensuring the safety of all tenants in an 811 PRA

development and for promoting a positive and congenial living environment. If a person is experiencing difficulty with good neighbor relations or is interfering with the safety of other tenants in an 811 PRA development, early intervention will reduce tension with neighbors and other tenants, minimize undue stress for a tenant, and avoid a possible eviction.

Intervention steps include:

- Help a person to determine reason (s) for neighbor/tenant tension
    - Misunderstanding or misconception (s)
    - Change in medical/health situation
    - Life event change causing stress
    - Environmental stressors
- Use person-centered engagement approaches and be fully aware of cultural differences, mental illness, and substance use disorders when resolving tenant conflicts.
- Facilitate conflict meditation or direct the person you are assisting to appropriate conflict resolution resources.
- Coordinate community resource referrals for behavior, mental health, substance abuse supports and services.

John experienced a difficult period in his life after living in his apartment for six months causing a change in his behavior and his ability to retain his housing. The property manager at John's apartment received several complaints about John's behavior, and in fact, several tenants accused John of physically threatening them. The property manager attempted to meet with John to discuss the allegations, but John continually avoided any contact. The direct threat to other tenants in the building concerned the property manager and was grounds for an eviction. John's case manager met with John and discovered that John had recently been prescribed some new medications that caused unpleasant side effects so John decided to stop taking all of his medications, which then led to his violent behavior. John's case manager quickly coordinated an immediate appointment with John's doctor to determine a different medical approach. John agreed to access additional supports including medication monitoring and attending a support group. A reasonable accommodation was granted and it was determined that as long as John was receiving services to reduce the risk of violent behavior, he would not be evicted.

3. Follow-Up

Case managers play an important role in helping a person resolve tenancy issues before they escalate into a crisis. Case managers can assist by helping a person to understand the consequences of their behavior or actions and by providing follow up contacts to monitor progress. Case managers will want to engage in these follow-up actions:

- Help a person understand the consequences of continuing the behavior/actions that are placing tenancy at risk
- Help a person to determine a timeline for changing the behavior/action that is in violation of the lease
- Encourage a person to access supports, including family/friends and community resources and supports offered through a person's plan of service
- Work with a person to set up an inspection/home visit schedule to help with determining progress or the need for additional supports
- Provide a written form of agreement with a person to include:
    - Proposed actions
    - Supports offered

- Suggested timeframes/deadlines
- Any agreements
- Date of the next scheduled visit

Case managers will need to continually check-in with a tenant as they make progress toward resolving any tenancy issues. If a tenant has resolved the issue, be sure to discuss with the person what they found to be most useful to them. Learning what worked for a person may be valuable information if the issue recurs or it may be a useful strategy or resource for another tenant. If a person is making progress but is still in violation of the lease, note what has been accomplished and continue to help a person understand the obligation that needs to be met. If a person has not made any changes, ask him/her what they think is stopping them from fixing the problem.

Reviewing Tenant Lease Issues

Case managers will want to engage in a de-briefing process after a tenant issue has been resolved. The de-briefing process includes:

- Assessing causes of the tenant issues
- Reviewing all possible warning signs and reasons for overlooking or missing the issue
- Analyzing interventions to determine which interventions worked and which ones did not
- Determining possible changes in interventions, strategies or follow up procedures
- Sharing lessons learned with other case managers or service systems

D. Managing a Tenant Issue

The 811 PRA Program has established policies and procedures for managing tenant issues that require property manager involvement. Use the strategies and intervention suggestions previously discussed in this section to resolve tenant issues. Remember that early intervention and consistent and timely communication with 811 PRA property manager staff is critical in preventing conflict and crisis.

Property managers will approach an 811 PRA Program tenant when a person appears to be violating his/her lease obligations. Lease violations generally occur if a person is not paying his/her rent on time; if a person is not maintaining his/her unit; or if a person is threatening the health and safety of other tenants or themselves. Lease violations prompting property management contact may include such actions as:

- Failure to pay full tenant rent
- Repeated late rent payments
- Excessive and intentional damage to a unit such as holes in the wall, intentional damage to appliances, breaking windows or other structures in a unit such as doors or railings
- Unsanitary unit that is creating a health or fire hazard
- Excessive clutter that is creating a health or fire hazard
- Repeatedly disturbing neighbors to include loud noise and/or threatening behavior
- Illegal or criminal activity in the unit, outside of the unit, or on the development premises
- Non-tenant activity to include allowing unauthorized persons to occupy the unit, behavior and activities of guests in the unit or on the premises

Step One: Property manager contacts an 811 PRA tenant due to possible lease violation.

Each 811 PRA Program development will have its own policies and procedures regarding how contact is initiated and pursued between a tenant and property management staff regarding lease violations. Some property managers may use written notification or verbal communication or both.

Step Two: Property manager attempts to resolve issue directly with tenant.

Each 811 PRA Program development will have its own policies and procedures on how to resolve a specific tenant issue. These include time frames for resolving the issue. If a lease

violation is a safety concern, time frames may be immediate. Each 811 PRA Program development will act in accordance with Fair Housing Laws and Maryland State Landlord/Tenant Laws. Property managers are not permitted to ask questions about a tenant's diagnosis, medications, mental health situation, or disability when they attempt to resolve the lease violation.

Step Three: Property manager contacts case manager if issue remains unresolved.

Property managers will contact case managers within seven days if an 811 PRA tenant has not complied with the terms or requests of the property manager to resolve the issue (s). Case managers are responsible for ensuring that the 811 PRA Program apartment development has updated contact information. If staff turnover occurs, case managers must submit a new **811 PRA Program Contact Form** to the property management staff. The form can be downloaded from the MDOD website.

Step Four: Case Manager provides intervention and support to resolve tenant issue.

Refer to the information and guidance offered in the **Housing Retention Process** of this section. Case managers can consult with the DHMH MFP Housing Director and MFP Housing staff for guidance, suggestions, and assistance to resolve a tenant issue at anytime. Case managers **must** follow these protocols:

- Immediate response to the property manager acknowledging issue and need for intervention
- Immediate attempt to engage tenant to assist with resolving the issue
- Swift employment of intervention strategies and needs
- On-going follow-up with tenant and property manager until satisfactorily resolved
- Determination of possible future supports and services to prevent reoccurrence of issue

If the situation or issue is not satisfactorily resolved in a timely manner or within accordance of the property management staff, the following steps will occur:

Step Five: Property Manager contacts DHMH Housing Director for additional support.

Case managers will be provided coaching and support from the DHMH Housing staff to assist with resolving the tenant issue. A case manager will be contacted within 24 hours by DHMH staff.

Step Six: Case Manager continues to provide intervention and support to tenant.

Case managers are now expected to provide **intensive** support to prevent escalation and to resolve the issue. Case managers may need to provide support on a daily basis to prevent a possible eviction.

Case managers are required to contact the property manager and MFP Housing Director within three business days to provide an update on the status of the situation.

Weekly updates are required until the issue is resolved. If the issue continues to escalate, the 811 PRA development property managers will act in accordance with Maryland Landlord/Tenant Law which may include eviction proceedings.

If the tenant issue is not resolved and the property manager begins the eviction process, the following steps will occur:

Step Seven: Property Manager Submits Intent to Evict Notification.

Eviction is a legal procedure. The first step in the eviction process is the **Maryland Notice to Vacate** that is submitted by a property manager to inform a tenant that the lease has ended (due to a lease violation (s)). A tenant can opt to comply with the notice and move out by the specified date, usually a thirty day notice.

If the tenant chooses to remain in the unit, the property manager will then file a complaint with the court. A court hearing is scheduled with the tenant and property manager. A judge will make a determination on whether or not a tenant can be forced to vacate the rental unit. If the judge decides in favor of the property owner, the court will issue a **Writ of Possession** which informs the tenant they must leave or they will be forcibly removed by the sheriff.

Case managers should provide a tenant with eviction resources to include:

- Baltimore Neighborhoods, Inc offers information to tenants and landlords statewide about their rights and responsibilities during the eviction process. 1-800-487-6007
- Legal Aid Bureau, Inc offers free legal services to low income persons. 410-539-534

Step Eight: Case Manager Assists a Person to Exit the 811 PRA Program.

Case managers are expected to continue to provide support to a person as they exit the 811 PRA Program, regardless of whether or not the exit is voluntary or non-voluntary. Case managers are expected to:

- Continue exploring all avenues for resolving the tenant issue.

- Take actions to prevent an “eviction record” by informing a person about the “Notice to Vacate” process, explaining that if a person agrees to voluntary leave the apartment by a specified date, the eviction does not proceed through the courts. Attempt to negotiate the vacate date to provide a person enough time to safely vacate the unit.
- Provide face-to-face communication with the tenant to ensure that a person understands the consequences of having to terminate his/her 811 PRA tenancy.
- Employ Housing Backup Plan and quickly determine if another community housing option is available.
- Continue to keep the MFP Housing Director and property manager informed about tenant’s ability to resolve the issue or tenant’s decision on when the unit will be vacated.

Step Nine: Case Manager Assists Person on Day of Unit Vacate.

Case managers are expected to help a person coordinate resources to assist with moving out of an 811 PRA unit and to help a person understand his/her move-out obligations. This includes:

- Packing and moving resources
- Cleaning of the unit
- Notifying utility company (s) re: shut off and final bill
- Submitting address change or release/permission for case management entity to receive notifications to include possible return of security deposit or other post tenancy documents/notifications
- Returning keys to property manager
- Coordinating supportive services to include crisis assistance, counseling, or other resources to help a person deal with challenges of re-housing, temporary housing placement, emergency medical support

E. Annual 811 PRA Program Requirements

Case managers are expected to assist 811 PRA tenants with meeting annual 811 PRA recertification requirements and ensuring that tenants report household changes to the 811 PRA Property Manager.

Annual Recertification
Each 811 PRA apartment development will have its own policies and procedures regarding annual recertification requirements. The annual recertification generally involves the following:

- Notifying the household about the annual recertification
- Obtaining information on income, assets and household composition
- Every household member age 18 or over must complete the recertification documentation
- Verifying the household's income and assets
- Renewing lease
- Notifying the household of any rent increase resulting from the recertification

When will the annual recertification occur?

Each 811 PRA apartment development will determine when the recertification process will begin. In general, property managers will contact an 811 PRA tenant 120 days prior to when a recertification is due. Case managers should be aware of the annual recertification date and should be prepared to assist a person with annual recertification requirements that may include submitting updated income/asset information, a unit inspection, and signing annual forms.

How will 811 PRA tenants be notified about the annual recertification?

Tenants will be notified in writing. Each 811 PRA development will determine its own notification process. Notifications may be mailed or hand-delivered. Generally, the property manager is responsible for ensuring that an 811 PRA tenant has recertified.

What information will the 811 PRA apartment property manager ask for during the annual recertification?

Tenants will be asked to verify income and assets. A tenant receiving SSI/SSDI benefits may be required to submit a benefit letter dated within the last 60 days and bank/savings statements from the most recent statement period.

What will the 811 PRA property manager do with the updated income/asset information?

The updated income and asset information is used to determine the household's income for the upcoming lease year. If a person's income has changed, a new monthly tenant rent amount will be calculated. A person's monthly tenant rent will not exceed 30% of the person's monthly income. If a person's SSI/SSDI benefit amount has increased, the new monthly tenant rent will reflect the increase. A person's new monthly tenant rent will remain the same until the next annual recertification unless a person has a change in income.

When will an 811 PRA tenant start paying the new monthly rent amount?

If a tenant has a new monthly rent amount, he/she will begin to pay the new amount on the date/month of the original lease signing date. If a person moved in on January 1st, the new rent amount would be due on January 1st of the new lease year. 811 PRA property managers will notify a tenant in writing about a change in the rent amount.

When will the annual unit inspection occur?

Each 811 PRA apartment development determines its own unit inspection schedule. Some 811 PRA developments inspect units on a biannual basis; some only annually. A tenant always receives at a minimum a 24-hour notice prior to a unit inspection, unless an emergency situation arises.

What is the tenant's responsibility during the inspection process?

An 811 PRA tenant is expected to respond to any notifications or announcements regarding the unit inspection and to allow an inspector to enter his/her home to conduct the inspection. A tenant should be in the home during the unit inspection.

Reporting Tenant Changes

Case managers working with persons living in 811 PRA units should be aware of basic tenant responsibilities to report any changes in a person's household size/composition, income, or unit condition to the property manager.

Household Size/Composition

In the event a household's composition changes in any way, i.e., birth, death, marriage, divorce, or a household member vacates the unit, the household must notify the 811 PRA property manager immediately. If a tenant would like to add a new household member, remind him/her to talk to the Property Manager. A new occupant of an 811 PRA unit must meet the screening criteria for the 811 PRA apartment development. A new adult member who is not a live-in aide

will be required to submit income and asset information. If the household's income exceeds the 811 PRA Program limits, a person may no longer income qualify for the 811 PRA unit.

Household Income
If an 811 PRA tenant has a change in income, the change needs to be reported to the 811 PRA Property Manager. If a person experiences a decrease in household income, a new tenant rent can be calculated, allowing a person to pay no more than 30% of monthly income toward rent. A person may experience a sudden and unexpected change in SSI/SSDI benefits significantly impacting his/her ability to pay rent and utilities. Report this change immediately so that the monthly rent amount can be recalculated to reflect this unexpected decrease in income.

Temporary Absence from Unit
If an 811 PRA tenant experiences a sudden change in health and/or an unexpected medical need arises requiring extended hospitalization and/or rehabilitation, report the absence to the 811 PRA Property Manager. Report **any** temporary absences that are to exceed more than **30** days. Property managers may want to know when a tenant is expected to return. If the absence is to exceed **180 days,** the tenant will be required to vacate the unit.

F. What is a successful 811 PRA Tenancy?

Living in an 811 PRA development provides all kinds of opportunities for persons with significant disabilities and extremely low incomes to reach his/her full potential as a member of the community, as a neighbor, and as a tenant. A successful 811 PRA tenancy for a person is an individual experience that can be supported and enhanced by your case management efforts.

Your efforts begin with helping a person to **acquire basic resource knowledge**—how to pay rent on time, how to manage a household budget, how to get along with neighbors, understanding tenant responsibilities and rights, and learning about community supports and services.

Adding to a successful PRA tenancy is the ability of an individual to gain or build upon **personal skills** such as good communication, managing a home, and respecting neighbors. You play an integral role in helping a person to realize and develop these skills.

Relationship building creates an environment of trust and support, which can increase a person's participation or a willingness to engage in friendship groups and to have more positive interactions with neighbors and property management staff. All of this leads to greater opportunities for connecting to support networks from health and medical to recreational to community groups, raising self-confidence and adding to a sense of control over one's life. Your

skill and experience with knowing how to help a person connect to community resources and supports is essential to promoting a successful 811 PRA tenancy.

Case managers are instrumental in supporting and encouraging a person to **take on new roles**—work, student, participation in civic activities, parenthood or family life, or a simple change in behavior, attitude, or personal accomplishment in overcoming a challenge allows a person to feel included and valued as a tenant, as a neighbor, and as member of the community.

IV. Appendix

Community Resources

Maryland Housing and Disability Services Resource Guide
The purpose of this guide is to provide general information about organizations that provide services and/or housing resources to people with disabilities. The guide is meant to be an easy to-use resource for directing people with disabilities to possible resources or to help answer questions and concerns that may come up as a result of a particular situation with a consumer with disabilities seeking housing. The Resource Guide is divided into four parts: general information about programs that provide services to people with disabilities, general information about affordable housing resources, *At-A-Glance* Quick Reference Guides that contain program and funding information and a county-by-county directory of contact information for organizations that provide assistance to people with disabilities. The Guide intended to help people identify a starting point for accessing information, and therefore is not an exhaustive list of all possible services and resources that may be available to Maryland citizens with disabilities.

There are many support groups, organizations and resources that may assist persons with disabilities far beyond those listed in this guidebook. The Resource Guide is available on the internet at http://resourcefinder.kennedykrieger.org.

Consumer Advocacy Resources for Addressing Housing Retention

Resources for Excessive Clutter Issues
HoardingCleanup.com is a database of qualified hoarding specialists including cleaning companies, therapists and psychiatrists across the United States that are all familiar with hoarding issues.

The Anxiety and Stress Disorders Institute of Maryland
www.anxietyandstress.com

International OCD Foundation Hoarding Center
http://www.ocfoundation.org/hoarding/

Mediation
Community Mediation Maryland
310 Tulio Avenue
Takoma Park, Maryland 20912
301-270-970

Legal Assistance
Legal Aid Bureau Inc.
500 East Lexington Street
Baltimore, MD 21202
410-951-7777
www.mdlab.org

Maryland Disability Law Center
1500 Union Avenue; Suite 2000
Baltimore, MD 21211
410-727-6352
www.mdlclaw.org

Homeless Persons Representation Project (HPRP)
201 N. Charles Street
Suite 104
Baltimore, Maryland 21201
410-685-6589
www.hprplaw.org

Eviction Assistance
Baltimore Neighborhood, Inc. (BNI)
2530 N. Charles Street, Baltimore, MD 21218
Administration: 410-243-4468
Fair Housing: 410-243-4400
Call Center / Tenant Landlord Hotline: 410-243-6007
www.bni-maryland.org

Suggested Forms for 811 PRA Program Retention

The following forms can be downloaded from The Coordinating Center website: www.coordinatingcenter.org

- Rent Payment Plan
- Housing Stability Questionnaire

The following form can be downloaded from the MDOD website: www.mdod.md.gov

- 811 PRA Program Contact Form

Glossary

This glossary provides definitions of terms and commonly used acronyms that may be useful to a case manager when helping a person with a disability access and retain an 811 PRA unit.

Area Agency on Aging (AAA)—Maryland's local agencies on aging were created in 1975 as required by federal guidelines to administer programs and services tailored to the needs of its elderly citizens. The agency may be a unit of local government or a private, nonprofit corporation. The agencies either provide services directly to older persons or contract with public or private units to administer programs. AAA case managers may refer persons to the 811 PRA program.

Affordable Housing—In general, housing for which the occupant(s) is/are paying no more than 30 percent of his or her income for gross housing costs, including utilities. For the purposes of the 811 PRA program, this general definition means that an 811 PRA unit is affordable at 30% of AMI for persons who receive SSI level income.

Alternative Living Unit (ALU)—"Alternative living unit" means a residence that:(i) Provides residential services for individuals who, because of a developmental disability, require specialized living arrangements; (ii) Admits not more than 3 individuals; and (iii) Provides 10 or more hours of supervision per unit, per week. A person living in an ALU unit may be eligible to apply for the 811 PRA Program.

Area Median Income (AMI)—The AMI is used to determine affordability levels and income eligibility for a variety of subsidized housing programs, including public housing, Section 8, and LIHTC. HUD publishes AMI tables for each family size in each locality annually. The 811 PRA referral system automatically downloads the AMI for each 811 PRA development location and automatically determines if a person's income is at or below 30% of AMI.

Annual Income—Refers to the total household income of the head of household, spouse living in the same unit, and any other adult member of the household. This includes earned income, benefit income such as Social Security, and income derived from assets. For the purposes of the 811 PRA Program, annual household income must be at or below 30% of AMI in order to qualify and remain eligible for the 811 PRA Program.

Applicant—Person that has submitted a referral to the 811 PRA Program. An applicant remains on the 811 PRA referral wait list until a unit becomes available; the applicant then submits an eligibility packet to the specific development and if approved is offered a unit. A person becomes a participant (tenant) once an 811 PRA lease has been signed.

Application Fee—Fee paid by an applicant to an 811 PRA development in order to process a credit and criminal background check as part of a specific development's screening criteria. The fee generally ranges from $25-$35 and is generally assessed for each adult member of the household.

Case Manager—Case manager is charged with collaborating with an individual in identifying that person's community living goals and coordinating services and providers to meet those goals. Depending on each respective service delivery system, the case manager may be referred to as a service coordinator, resource coordinator, case manager, behavioral health specialist, or independent living specialist.

Center for Independent Living (CIL)—Centers for Independent Living are community-based, cross-disability, non-profit organizations that are designed and operated by people with disabilities. Centers for Independent Living provide peer support, information and referral, individual and system advocacy, and independent living skills training. CILs may refer persons to the 811 PRA Program.

Contract Rent—Contract rent is the monthly cash rent agreed to, regardless of any furnishings, utilities, fees, meals, or services that may be included. For the purposes of the 811 PRA program, the contract rent is the agreed to amount between the property development and the Department of Housing and Community Development (DHCD).

Criminal Justice Information System (CJIS)—CJIS Central Repository receives, maintains, and disseminates Maryland's criminal history records. It receives reports of criminal "events" (e.g., arrests, convictions, sentences, etc.) from law enforcement, courts, corrections, and other criminal justice entities. These are compiled into an individual's chronological criminal history called a "RAP" Sheet (Report of Arrest and Prosecution). These offender-based records are used by criminal justice agencies (police, sheriffs, state's attorneys, courts, correctional agencies, parole and probation, etc.) for investigation, apprehension, prosecution, correctional and supervision classification, and other criminal justice purposes. They are also used by authorized governmental and private agencies for noncriminal justice purposes.

Developmental Disabilities Administration (DDA)—The Developmental Disabilities Administration provides a coordinated service delivery system so that individuals with

developmental disabilities receive appropriate services oriented toward the goal of integration into the community. These services are provided through a combination of state residential centers (providing services to individuals with intellectual disability) and a wide array of community based services delivered primarily through a network of non-profit providers. DDA service providers may refer persons to the 811 PRA Program.

Department of Housing and Community Development (DHCD) —The Maryland Department of Housing and Community Development works with partners to finance housing opportunities and revitalize communities for Maryland citizens to live, work and prosper. DHCD administers the Low Income Housing Tax Credit program as well as other federal, state, and local affordable housing financing initiatives. DHCD administers the rental contracts associated with the 811 PRA Program.

Department of Health and Mental Hygiene (DHMH)— is the health and human services agency of the State and is responsible for operating a program of medical assistance (Medicaid) designed to pay for medical services for eligible individuals, and for overseeing the Developmental Disabilities Administration(DDA), the Mental Hygiene Administration (MHA), and the Money Follows the Person Demonstration Program (MFP).

Development—For the purposes of the 811 PRA Program a development is referred to as an apartment complex providing housing units for low income households that has received federal and/or state funds to construct or rehab the property.

Eviction— A landlord's legal removal of a tenant from his rental property. Eviction may occur when rent has not been paid, when the terms of the rental agreement have been breached or in certain other situations. The eviction process is a legal process and is a matter of state and local law.

Existing Building—A building that is currently part of DHCD's affordable rental housing portfolio. For the purposes of the 811 PRA program, an existing building will provide unit availability notification 30-60 days in advance of when a unit is ready to be occupied.

Extremely Low Income—Refers to families with incomes at or below 30% of the AMI. The 811 PRA Program provides affordable housing opportunities for persons with a disability at the extremely low income level.

Fair Housing Law—Refers to federal laws designed to protect access to housing regardless of race, color, national origin, sex, familial status or disability. 811 PRA developments comply with Fair Housing Laws.

Frank Melville Supportive Housing Act—On January 4, 2011, President Barack Obama signed into law the Frank Melville Supportive Housing Investment Act of 2010.This legislation was enacted to revitalize and reform the U.S. Department of Housing and Urban Development (HUD) Section 811 Supportive Housing for Persons with Disabilities Program.

Gross Rent— Gross rent is the contract rent plus the estimated average monthly cost of utilities and fuels if these are paid by the renter.

Home and Community Based Services (HCBS)—Home and community-based services (HCBS) provide opportunities for Medicaid beneficiaries to receive services in their own home or community. These programs serve a variety of targeted populations groups, such as people with mental illnesses, intellectual disabilities, and/or physical disabilities.

Housing Choice Voucher Program (HCVP)—The Housing Choice Voucher Program is a federally funded, locally administered rental assistance program that helps low-income families, the elderly and the disabled afford decent, safe housing in the private market. The program is generally administered by a Public Housing Authority (PHA).

HEARTH Act—On May 20, 2009, President Obama signed a bill to reauthorize HUD's McKinney-Vento Homeless Assistance programs. The bill is known as the Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act providing funding to states and municipalities for homelessness services.

Hoarding— Hoarding is a type of behavior characterized by the acquisition of, and inability to discard items even though they appear (to others) to have no value. Living spaces (are) sufficiently cluttered so as to preclude activities for which those spaces were designed for and hoarding causes significant distress or impairment to the tenant, others in the building, and the owner of the building.

Homeless Definition—On January 4, 2012, final regulations went into effect to implement changes to the U.S. Department of Housing and Urban Development's (HUD's) definition of homelessness contained in the Homeless Emergency Assistance and Rapid Transition to Housing Act (HEARTH Act). The definition affects who is eligible for various HUD-funded homeless assistance programs. The new definition includes four broad categories of homelessness:

- People who are living in a place not meant for human habitation, in emergency shelter, in transitional housing, or are exiting an institution where they temporarily resided if they were in shelter or a place not meant for human habitation before entering the institution. The only significant change from existing practice is that people will be considered homeless if they are exiting an institution where they resided for up to 90 days (it was previously 30 days), and were homeless immediately prior to entering that institution.
- People who are losing their primary nighttime residence, which may include a motel or hotel or a doubled up situation, within 14 days and lack resources or support networks to remain in housing. HUD had previously allowed people who were being displaced within 7 days to be considered homeless. The regulation also describes specific documentation requirements for this category.
- Families with children or unaccompanied youth who are unstably housed and likely to continue in that state. This is a new category of homelessness, and it applies to families with children or unaccompanied youth (up to age 24) who have not had a lease or ownership interest in a housing unit in the last 60 or more days, have had two or more moves in the last 60 days, and who are likely to continue to be unstably housed because of disability or multiple barriers to employment.
- People who are fleeing or attempting to flee domestic violence, dating violence, sexual assault, stalking, or other dangerous or life-threatening situations related to violence; have no other residence; and lack the resources or support networks to obtain other permanent housing.

Household— All the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.

Head of Household—*Head of household* means the adult member of the family who is considered the head for purposes of determining income eligibility and rent. The head of household is responsible for ensuring that the family fulfills all of its responsibilities under the program, alone or in conjunction with a co-head or spouse. For the purposes of the 811 PRA program, the head of household must be a person with a disability between the ages of 18 and 62.

Housing Assessment—Housing assessment is a person-centered process that encourages an individual to focus on strengths and assets and choice and preferences when exploring community living options. The objective of a housing assessment is to obtain information, data and knowledge about a person's housing history in order to help a person achieve community living goals.

Housing Documents—Housing documents generally include a birth certificate, Social Security card, government-issued ID and verification of income and assets to include a benefit award letter (s) dated within the last 60 days, most recent bank and savings statement (s), most recent pay stubs if currently employed, verification of life insurance policy (s), and others as requested by a housing provider to verify household income and assets, citizenship status, and age.

Housing and Urban Development (HUD)—The United States Department of Housing and Urban Development (HUD) is a federal agency created as a Cabinet level position in 1965. HUD's mission is to create strong, sustainable, inclusive communities and quality affordable homes for all. HUD is working to strengthen the housing market to bolster the economy and protect consumers; meet the need for quality affordable rental homes: utilize housing as a platform for improving quality of life; build inclusive and sustainable communities free from discrimination; and transform the way HUD does business.

Integrated Housing—For the purposes of the 811 PRA Program, integrated housing refers to a setting that offers a person with a disability the opportunity to interact with persons regardless of whether or not they have a disability in an apartment development where no more than 25% of units are set aside specifically for persons with a disability.

Lease—A lease is a contract between a property owner and a tenant. A lease sets forth the details of the rental contract to include how much the monthly rent is, when it is due, what will happen if rent is not paid, the duration of the lease, how many occupants may live in the unit, and essential information on basic rules and regulations regarding use and care of the rental property.

Life Skills—Life skills, sometimes referred to as independent living skills or activities of daily living (ADLs), are basic skills needed to take care of one's personal needs such as housekeeping, personal hygiene, meal preparation, budgeting, and using transportation.

Low Income Housing Tax Credit (LIHTC)—A federal program which gives financial incentives to developers for constructing new affordable housing units or substantially rehabbing existing units. The LIHTC program was created by the Internal Revenue Code Section 42 to leverage

private sector investment capital for the development of affordable housing units for households earning 60% or less of Area Median Income (AMI). The program is administered at the state level by state housing finance agencies which have discretion in determining which projects to award credits.

Maintenance Staff—Maintenance staff is generally responsible for repairs and preventative maintenance needed to keep a building's infrastructure running smoothly. This may include plumbing, electrical, painting, heating, air conditioning and appliance maintenance and repair. Maintenance staff responds to emergency repairs as well as daily and routine maintenance concerns of the general apartment complex and to individual apartment units.

Maryland Partnership for Affordable Housing (MPAH)—The consortium of state agencies, advocates, stakeholders and developers across Maryland's affordable housing and disability service systems responsible for increasing integrated housing opportunities for Marylanders with disabilities. The coordination, planning and capacity building efforts of the MPAH helps to position the state to take advantage of funding opportunities such as the Sec 811 PRA and the Harry and Jeanette Weinberg Foundation Affordable Housing Initiative.

Maryland Disability Law Center (MDLC)—Maryland Disability Law Center (MDLC), a non-profit 501(c)(3) legal advocacy organization, is Maryland's designated Protection and Advocacy agency, mandated to advance the civil rights of people with disabilities. MDLC provides free legal services to Marylanders of any age with all types of disabilities (developmental, intellectual, learning, psychiatric, physical, sensory, traumatic brain injury), who live in facilities, in the community or who are homeless.

Maryland Department of Disabilities (MDOD)—MDOD advances the rights and interests of people with disabilities so they may fully participate in their communities. Specific to Sec 811 PRA Program, MDOD is responsible for ensuring inter-agency coordination and administration of the Sec 811 PRA Unit Registry and Applicant Referral System.

Medicaid—Title XIX of the Social Security Act is a Federal/State entitlement program that pays for medical assistance for certain individuals and families with low incomes and resources. It became a law in 1965 as a cooperative venture jointly funded by Federal and State governments to assist State in furnishing medical assistance to eligible needy persons. Medicaid is the largest source of funding for medical and health related services for America's poorest people. Each state establishes its own eligibility standard, determines the type, amount, duration, and scope of services, and sets the rate of payment for services, and

administers its own program. Medicaid policies for eligibility, services, and payment are complex and vary considerably, even among States of similar size or geographic proximity

Money Follows the Person (MFP)—Offered through the Centers for Medicare and Medicaid Services (CMS), was created as part of the Deficit Reduction Act of 2005, a law passed by the U.S. Congress. Originally set to end in 2011, the passage of the Affordable Care Act of 2010 extended the demonstration until 2016. The purpose of the demonstration is to promote a series of rebalancing objectives written in the statute. The term "rebalancing" refers to efforts to minimize or eliminate barriers to individuals receiving long-term supports and services in home and community settings, rather than in institutional settings.

MFP Housing Director—Main duties are to supervise three (3) housing specialists and direct policy development related to affordable and accessible housing for MFP participants. This includes direct training and support of the housing specialists and MFP partners such as staff of Maryland Access Point sites, Area Agencies on Aging, public housing authorities, and other stakeholders; clarifying policy and customer service issues, and identifying opportunities to increase collaboration and develop additional housing resources. The MFP Housing Director plays an integral role in the 811 PRA Program, assisting case managers and tenants to resolve tenancy issues and is responsible for responsive communication with 811 PRA property managers in the event of a tenant concern.

Mental Health Administration(MHA)—The Mental Hygiene Administration (MHA) is the agency within the Department of Health and Mental Hygiene responsible for the delivery of public mental health services. MHA funds services to individuals who, because of the severity of their illness and their financial need, are qualified to receive state subsidized services. MHA and designated providers of mental health services may refer persons to the 811 PRA Program.

Mixed-Income Development—Type of development that includes families at various income levels ranging from extremely low income to high income families. Mixed-income developments are intended to promote deconcentration of poverty and give lower-income households access to improved amenities. 811 PRA units may be located in a mixed-income development.

Non-elderly disabled (NED)—Non-elderly disabled refers to persons with a disability between the ages of 18-62. The 811 PRA Program is a NED housing program.

Newly Constructed—Newly constructed building refers to a building whose first use begins with the LIHTC program or other state/federally financed program. For the purposes of the 811

PRA Program, a newly constructed building will provide unit availability notification 60 days in advance of when a unit is ready to be occupied.

Olmstead Decision—On June 22, 1999, the United States Supreme Court held in *Olmstead v. L.C.* that unjustified segregation of persons with disabilities constitutes discrimination in violation of title II of the Americans with Disabilities Act. The Court held that public entities must provide community-based services to persons with disabilities when (1) such services are appropriate; (2) the affected persons do not oppose community-based treatment; and (3) community-based services can be reasonably accommodated, taking into account the resources available to the public entity and the needs of others who are receiving disability services from the entity.

Open Judgment—A court order to a pay a certain amount of money subsequent to a filed lawsuit. If a creditor, lender, debt collector, attorney or some other party files a lawsuit against an individual and wins, a judgment is made against the person and it remains "open" until paid or resolved and appears on a credit report for up to 7 years. For the purposes of the 811 PRA Program, open judgments for past due rent or utility bills may significantly impact a person's ability to meet credit screening criteria.

Open-ended Questioning—Refers to a person-centered engagement approach. Open-ended questions generate discussion and provide clients the space to share their own perspective, building trust and enhancing interaction. Examples of open-ended questions may include: *What would you like to talk about?" "What's been going on?"* or *"How did that make you feel?"*

Person-Centered Planning—Person-centered planning is a process, directed by an individual and/or his/her family, to identify strengths, capacities, preferences, and desired outcomes of a person with long-term care needs. Case managers working with the 811 PRA Program will be expected to understand and utilize a person-centered planning process.

Person with a Disability—Section 504 of the Rehabilitation Act defines a person with a disability as "Any person who has a physical or mental impairment that substantially limits one or more major life activities; has a record of such impairment; or is regarded as having such an impairment." For the purposes of the 811 PRA Program, this definition will apply.

Public Housing Authority (PHA)—A Public Housing Authority manages and administers affordable federal housing programs for low-income families to include providing decent and safe rental housing for eligible low-income families, the elderly, and persons with a disability. Public Housing Authorities can be a state, county, municipality, or other type of government

agency or entity. The two most common affordable housing programs managed or administered by a PHA are public housing and the Housing Choice Voucher (HCV) program. For the purposes of the 811 PRA Program, case managers will be responsible for interfacing with a PHA when placing a person's name on the HCV wait list and/or for obtaining other community housing resources.

Project Rental Assistance (PRA)—A form of project-based rental assistance provided under the new Section 811 PRA Supportive Housing for Persons with Disabilities program providing a rental subsidy to new or existing affordable housing developments funded by LIHTC, HOME funds or other state or federal sources. The rental assistance allows for rents to be affordable to persons with a disability with extremely low incomes.

Property Manager—A property manager is generally responsible for ensuring a high occupancy rate and for providing a safe and enjoyable tenant experience. Property managers may show units, process eligibility paperwork, coordinate lease signings, educate new tenants about tenant obligations, collect rents, enforce rules and regulations and ensure that a property is well maintained.

Reasonable Accommodation—A "reasonable accommodation" is a change, exception, or adjustment to a rule, policy, practice, or service that may be necessary for a person with a disability to have an equal opportunity to use and enjoy a dwelling, including public and common use spaces.

Reasonable Modification—A reasonable modification is a structural change made to existing premises, occupied or to be occupied by a person with a disability, in order to afford such person full enjoyment of the premises.

Recertification—Refers to an annual process to obtain updated household composition and income verifications to ensure that a household continues to qualify for a housing unit.

Reflective Listening—Reflective listening is an engagement skill used to develop trust and relationship building by effectively responding to what a person says. Reflective listening involves paraphrasing, repeating, acknowledgment of feelings and rephrasing.

Security Deposit—A payment required by a landlord from a tenant to cover the expenses of any repairs of damages to the premises greater than normal "wear and tear." The security deposit is collected separately from the rent and is generally required in full at the lease

signing. Maryland law prohibits a landlord from collecting no more than 2 month's contract rent for a security deposit.

Social Security Disability Insurance (SSDI) —Social Security Disability Insurance (SSDI) pays benefits to people with disabilities who have worked and paid Social Security taxes on their earnings, and to certain dependents of a worker who has retired, become disabled, or died. Eligibility, and amount of benefits, depends on how long the insured person worked, how much money he/she earned, and how many people are being paid from his/her account.

Social Serve—Socialserve.com is a 501(c)(3) not-for-profit organization that develops and provides customized housing locators, including mdhousingsearch.org. Social Serve has constructed the MDOD 811 PRA Referral System and is responsible for on-going hosting and maintenance of the system.

State Housing Finance Agency—See Department of Housing and Community Development (DHCD)

State Medicaid Agency—See Department of Health and Mental Hygiene (DHMH)

Substandard Housing—For the purposes of the 811 PRA Program, substandard housing refers to housing that no longer meets a person's safety and health needs and cannot be made accessible due to cost and/or feasibility. Substandard housing may include the following characteristics:

- Lacks necessary plumbing, heating, has no electricity
- Dilapidated housing including exposed wires, broken staircases, broken elevator, and various maintenance problems such as water leaks and cracks in the wall (s)
- Excessive overcrowding
- Excessive vermin/rodent infestation

Substantial Rehab—The improvement of a property to a decent, safe, and/or upgraded condition. Substantial Rehabilitation may vary in degree from gutting and extensive reconstruction to the cure of substantial accumulation of deferred maintenance, or remodeling and upgrading interior rooms such as a kitchen or bathroom. For the purposes of the 811 PRA Program, a substantial rehab will provide unit availability notification 60 days in advance of when a unit is ready to be occupied.

Supplemental Security Income—Supplemental Security Income (SSI) pays monthly benefits to people with disabilities whose income and resources are below set limits. A person does not have to have a work history. Eligibility for SSI will make a person eligible for Medicaid.

Supportive Housing—For the purposes of the 811 PRA Program, Supportive Housing is adopted as a best practice approach providing affordable and permanent housing for persons who have access to Medicaid-funded voluntary supportive services. Tenants pay no more than 30% of their income toward rent; tenants are under a lease agreement, which includes paying rent and abiding by the terms and obligations of a lease; and tenants have access to supports and service independent of their 811 PRA housing arrangement.

Tenant—A person who rents and occupies an apartment, a house, an office, or the like, from another under the terms of a lease. A tenant can be referred to as a " lessee." For the purposes of the 811 PRA Program, a tenant is a person who is paying rent on a monthly basis under a signed lease.

Tenant Obligations—For the purposes of the 811 PRA Program, tenant obligations are referred to as what it takes to be a tenant in good standing:

- Paying rent on time
- Maintaining one's unit
- Engaging in friendly neighbor relations
- Complying with terms of a lease

Tenant Rent—For the purposes of the 811 PRA Program, tenant rent refers to the amount of rent a tenant pays directly to an 811 PRA property manager/development, not to exceed 30% of a household's income.

Termination—Refers to the ending of a lease which can be voluntary or non-voluntary. A landlord may legally terminate a lease if a tenant significantly violates the lease agreement. A tenant may terminate (end) a lease early but must be responsible for complying with the lease requirement (s) for early termination.

Unit Size—Refers to the bedroom size of a unit. For the purposes of the 811 PRA Program, bedroom sizes are restricted to 1 or 2 bedrooms.

Utilities—includes the providing of electricity, gas and water and may also include garbage disposal. Each 811 PRA development will specify which utilities a tenant is responsible for and which utilities are included as part of the monthly rent obligation.

Wheelchair Accessible Unit— Wheelchair accessible unit generally means that the dwelling meets prescribed requirements allowing a person in a wheelchair to access and use the unit. Mandatory requirements for wheelchair accessible housing vary widely and are found in state, local, and model building codes, in federal regulations such as section 504 of the ADA and the Fair Housing Amendments Act requirements. They are also found in standards such as the American National Standards Institute's A117.1 (ANSI A117.1-1986,1998) and the Uniform Federal Accessibility Standards (UFAS). Wheelchair accessible features in dwellings include items such as wide doors, sufficient clear floor space for wheelchairs, lower countertop segments, lever and loop type handles on hardware, seats at bathing fixtures, grab bars in bathrooms, knee spaces under sinks and counters, switches and controls in easily reached locations, entrances free of steps and stairs, and an accessible route through the house.

Case Manager Checklist for the 811 PRA Program

1. OUTREACH

- ☐ Identify persons meeting target population criteria.
- ☐ Provide education and information about the 811 PRA Program.
- ☐ Enter Outreach activity into the 811 PRA Outreach Information System.

2. CONDUCT A HOUSING ASSESSMENT

- ☐ Obtain personal housing information through face-to-face meeting.
- ☐ Determine person's assets and strengths and challenges.
- ☐ Obtain demographic and personal data.
- ☐ Determine if 811 PRA Program is appropriate housing option.
- ☐ Complete 811 PRA Information Form if applicant chooses to apply.

3. REFER APPLICANT TO 811 PRA PROGRAM

- ☐ Obtain Social Serve User ID.
- ☐ Go to MDOD website and click on link to Maryland Partnership for Affordable Housing, 811 PRA Program Referral.
- ☐ Log on to your account and click on 811 PRA Program waitlist.
- ☐ Enter applicant data.
- ☐ Provide first in series of "How to be a Good Tenant" Training

4. OBTAIN HOUSING DOCUMENTS AND RESOURCES WHILE APPLICANT IS ON WAITLIST

- ☐ Obtain birth certificate, ID, Social Security card, income documents.
- ☐ Review credit history and make appropriate resource referrals.
- ☐ Review criminal background and make appropriate resource referrals.
- ☐ Address any personal rental history challenges.
- ☐ Obtain resources for application fees, security deposits, moving expenses.

5. SECURE HOUSING AND ASSIST WITH MOVE INTO NEW UNIT

- ☐ Coordinate pre-tenancy obligations.
- ☐ Set up utilities.
- ☐ Obtain renters insurance if required.
- ☐ Verify amount of security deposit and first month's rent.
- ☐ Set up Rent Payment Plan.
- ☐ Provide second in series of "How to be a Good Tenant" Training.
- ☐ Coordinate lease signing date.
- ☐ Request a reasonable accommodation if necessary to help a person during the lease signing process.
- ☐ Attend Lease Signing.
- ☐ Assist client with understanding lease obligations and terms.
- ☐ Submit 811 PRA Program Contact Form.
- ☐ Coordinate Move into Unit.
- ☐ Coordinate set up of services and supports.

6. BEGIN HOUSING RETENTION PROCESS

- ☐ Provide third in series of “How to Be a Good Tenant” Training
- ☐ Implement Rent Payment Plan.
- ☐ Facilitate relationships with Property Manage and Maintenance Staff.
- ☐ Complete Housing Backup Plan.
- ☐ Establish Home Visit Protocols.
- ☐ Understand a Tenant’s responsibilities and provide intervention if needed.
    - ☐ Paying Rent on Time.
    - ☐ Keeping unit safe and clean.
    - ☐ Engaging in friendly neighbor relationships.
    - ☐ Complying with terms of lease.
- ☐ Coordinate community resources and connections to help a person achieve satisfaction with home and community life.

Maryland Partnership
for Affordable Housing