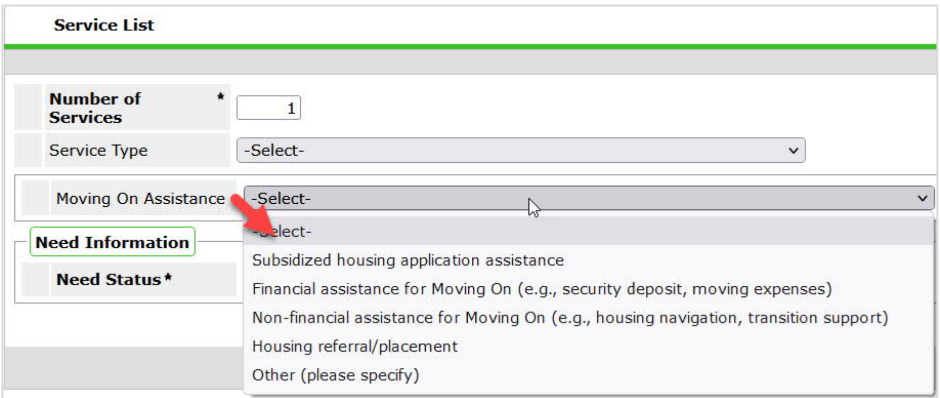
PSH Moving On
Service Transaction Resource Guide

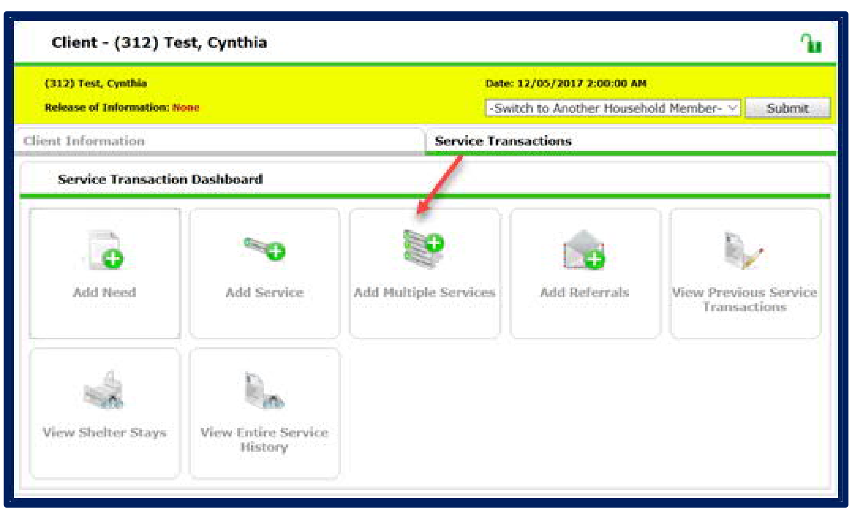
<u>Element C2 – Moving On Assistance</u>

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



Adding the Moving On Assistance Service Need Transaction

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



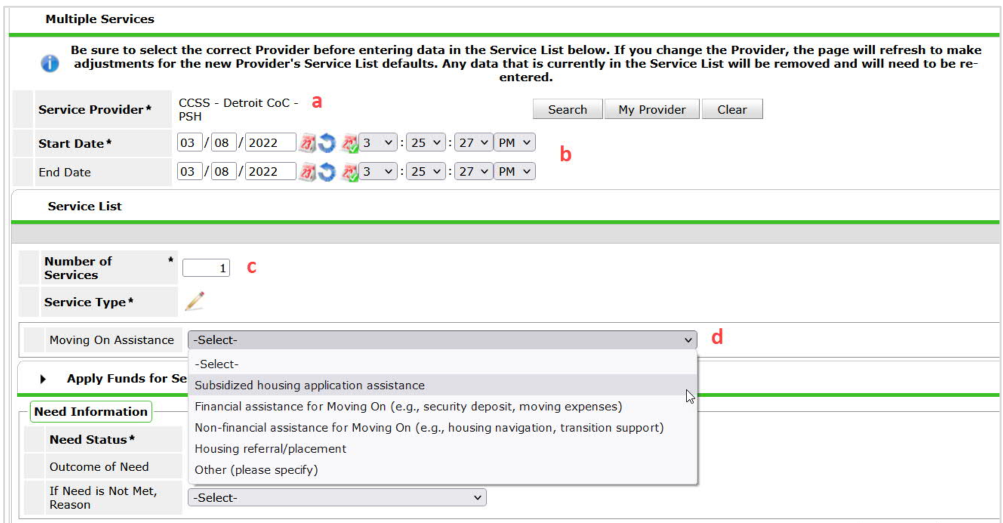
a. Ensure the Service Provider is correctly displayed.

b. Establish the start and end date for the service.

   i. Start Date = the date the service is provided (if not already set in backdate mode).

   ii. End Date = the start date.

c. Leave the Number of Services set to 1.



d. Select the appropriate Moving on Assistance type provided from the dropdown list of options.

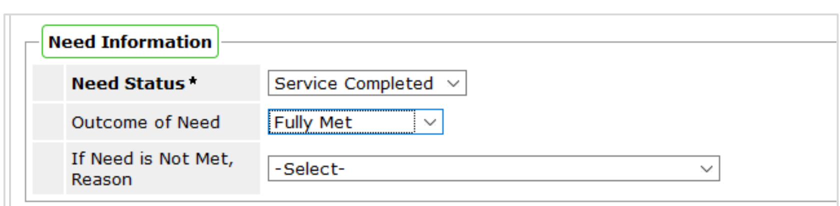
   i. Prior to waitlist

      - Subsidized housing application assistance

   ii. Once Pulled –

      - Financial assistance for Moving On (e.g., security deposit, moving expenses)
      - Non-financial assistance for Moving On (e.g., housing navigation, transition support)
      - Housing referral/placement

5. Navigate to the Need Information section.



a. Select Service Completed from the Need Status dropdown list of options.

b. Select Fully Met from the Outcome of Need dropdown list of options.

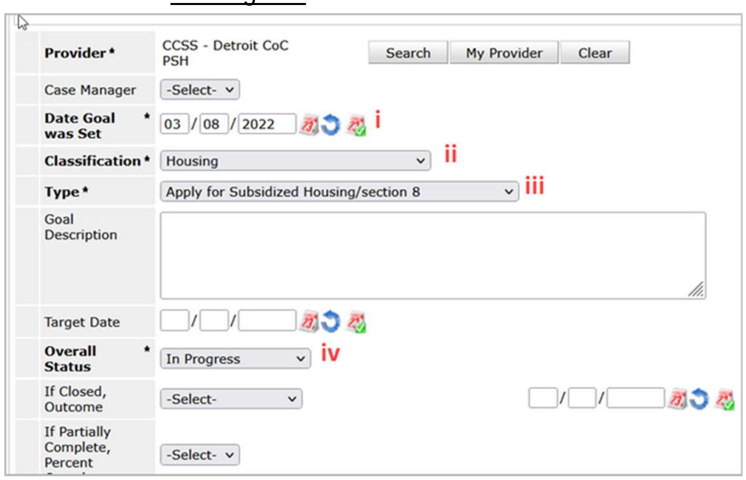
6. Click Save & Exit once the service has been added.

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

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

Addressing Case Plans & Case Notes

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



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

Adding Additional Case Notes

To add additional case notes to the existing goal:

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

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