

## Move On Process Checklist for Case Managers

*For a complete list of forms and resources, review “Move On Strategies and Case Manager Tools” at [Lane County Provider Tools](#)*

### **Step 1: Assessing Move On Readiness**

- Is the household eligible for a Section 8 voucher? To answer this question, reference Section 8 eligibility criteria.
  - YES**, household is eligible for Section 8- continue with checklist.
  - NO**, household is not eligible for Section 8- STOP.
  - The **ONLY** barrier to Section 8 eligibility is debt owed to a Public Housing Authority – email [HSDHelpDesk@co.lane.or.us](mailto:HSDHelpDesk@co.lane.or.us) to explore debt resolution options.
- During regularly scheduled assessment period (annual/quarterly etc), Case Manager completes Move on Matrix based on their knowledge of the household situation.
  - Remember:
    - o You can mark items as “Not Applicable” or “N/A” if they are not relevant to score for the client. See scoring matrix at the end of the Move on Matrix for how to adjust the mean scores based on “N/A” answers. If you have questions about scoring, email [HSDHelpDesk@lanecountyor.gov](mailto:HSDHelpDesk@lanecountyor.gov).
    - o Do not complete the Move on Matrix with the household, household does not complete for themselves. This is a tool for Case Managers to fill out.
    - o Score clients based on how each factor affects overall housing stability.
- Case Manager discusses Move on Matrix scoring with direct supervisor.
  - Since this is a new process, if scoring does not seem in line with your perception of client’s housing stability, please email your comments and experience to [HSDHelpDesk@lanecountyor.gov](mailto:HSDHelpDesk@lanecountyor.gov) to help us improve the tool and process.
  - Discuss household score with supervisor and come to agreement on a Move on Matrix score for household.
  - Both Case Manager and Direct Supervisor sign Move on Matrix.
  - Put a copy of the Move on Matrix in the client file.
  - Household does **NOT** score “Move on Ready” in ALL applicable domains, STOP.
  - Household **DOES** score “Move on Ready” in all applicable domains, continue to Step 2.

### **Step 2: Research**

Complete this step if the household has scored “Move on Ready” in all applicable domains on the Move On Matrix and Case Manager has discussed this score with their Direct Supervisor. This research step will help you be informed when you have a conversation with the client.

- Case Manager researches whether client could transition in place and use their Section 8 voucher to stay in their current housing situation.

Factors to Consider:

Section 8 payment standards are lower than the rental payments available through Permanent Supportive Housing. This means that the household may not be able to lease in place depending on the rent of their current unit.

The Section 8 eligibility amount for a unit is the Gross Rent Limit: (Contract Rent + Average Utilities) for the Section 8 payment standard + 10% of the household's adjusted income. ***Review the current Section 8 payment standard schedule for subsidy baseline amounts to determine if the client's current rental payment is eligible under Section 8 guidelines.***

If you have questions about whether a client could transition in place, based on their unique situation, or what their rent would be, please email Candice King, the Homes for Good Housing Liaison, [Cking@homesforgood.org](mailto:Cking@homesforgood.org)

How might the client's needs, background, or history affect their ability to find and secure a lease in the private housing market?

Does the client have a criminal record?

Does the client have a record of evictions or poor rental history?

What is the client's credit score?

Does the client owe any debt to a Public Housing Authority, utility company, or past landlord?

Does the client require an ADA accessible unit (such as a ground floor unit or other accommodations)?

Are there certain neighborhoods or areas in which the client does not desire to live? (For example, some client may want to avoid certain areas to remain in recovery)

Does the client have a social support network in another County or state or have a desire to move out of Lane County? Note that recipients of Section 8 vouchers can "port" the voucher and move to another County or state.

**YES**, client could use a Section 8 voucher in their current living situation and transition in place. Make client aware of this when you have a conversation with them in Step 3.

**NO**, client cannot transition in place. Make client aware of this when you have a conversation with them in Step 3.

Take the information gathered in this step to have an informed conversation with the client. Continue to Step 3.

### **Step 3: Discussion with the Client**

Now is the time to discuss the Section 8 voucher Move On option with the household. At this stage, the client has scored Move on Ready on the Move on Matrix. The Case Manager has conducted research about whether the client could transition in place and how their needs and background may affect their ability to secure a lease in the private rental market.

The Move On strategy is a client-driven and client-centered approach. No client will Move On to a Section 8 voucher if they do not choose to do so. Now is the time to determine the client's interest in a Section 8 voucher, desire to Move On, and their current stage of change. This may be an ongoing process and discussion of client goals if they are understandably anxious about the Move On process.

At this stage:

- The household has scored Move On ready in all applicable domains in the Move On Matrix.
- The household is eligible for Section 8.
- Case Manager has researched whether the client could transition in place.
- Case Manager has researched other factors and needs that are relevant to Move On

Discussing the Move On option with the client:

- Schedule a meeting with the client. Meet them where they are, likely in their home.
- Inform client that "Move On" is an option for people who have gained self-sufficiency and independence.
- Inform client about the Move On assessment that you have completed. The Move On assessment identified that they are ready to be more independent but could still benefit from a rental subsidy. Discuss their score and strengths with them.
- Inform client that they are eligible for a Local Preference Section 8 Voucher. Explain how Section 8 is unique compared to Permanent Supportive Housing. [*See handout "Important Things to Know for Section 8 Referrals"*]
- Inform client about your research: could they use the Section 8 voucher to transition in place?
  - What services does the client currently receive/utilize through the Permanent Supportive Housing program? How can the client access these services through other community-based programs or the client's social support network (including medical professionals, community resources etc)? Discuss these options with the client. Note: This may be an ongoing discussion until they are ready to be more independent. Work with the client towards further independence.
  - Gauge the client's readiness and interest in Moving On.
  - Discuss and map out with the client their current resource and social safety net. Who are their doctors? Friends? Who do they turn to in time of crisis? Reaffirm the client's strengths and ability to be self-sufficient. Focus on progress client has made in the program. Consider completing "Exit Planning" worksheet with client.
  - Consider utilizing Motivational Interviewing techniques to determine the client's current stage of change. If they have scored as Move On ready, and they are eligible for a Section 8 voucher then they are ready for more independence. Change is difficult and can be very scary. It may be appropriate to begin coaching conversations using Motivational Interviewing with the client to get them to a place where they are confident that they can Move On.

Based on your conversation with the client, does the client choose to Move On to a Section 8 voucher at this time?

- Yes.**
- No.**
  - If **no**, what Stage of Change are they in?<sup>1</sup>
    - Pre-Contemplation
    - Contemplation
    - Preparation/Determination
    - Action
    - Relapse
    - Maintenance

#### **Step 4: Referral for Section 8 Voucher**

At this stage, your client is motivated and eligible for a Move On voucher. There are a few items to prepare before you are ready to submit a complete referral to Lane County. All referrals will go through Lane County, and not to Homes for Good directly. This is because once the referral moves to Homes for Good, time limitations on required documentation apply. Lane County staff will help you be fully prepared for the Section 8 voucher before it is officially sent to Homes for Good.

The household will need to have important documentation in order to receive a Section 8 voucher. Documentation must be presented to Homes for Good within 14 business days of the postmarked Section 8 application packet. For that reason, prepare all necessary documentation before submitting your referral to Lane County. This will expedite the process and ensure that your client does not become ineligible for Section 8 based on missing a deadline.

Mark all documentation that the client currently possesses. Make sure that your client has this documentation:

- Documentation of legal identity for all members of the household. This may include valid driver's license or State ID; U.S. Military Discharge DD214; current U.S. Passport; current employer identification card; birth certificate.
- Documentation of valid Social Security Number (SSN). This can be from a benefits award letter.
- Income verification. This may include Social Security Benefit award letter, employment pay stub etc. Note, HUD rules mandate that this documentation be recent (within the past 60 days). You may need to get an updated award benefit letter from Social Security, or help your client get an award letter by creating a "My Social Security" Account at [www.SSA.gov](http://www.SSA.gov).

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<sup>1</sup> <http://sphweb.bumc.bu.edu/otlt/MPH-Modules/SB/BehavioralChangeTheories/BehavioralChangeTheories6.html>

- Asset verification. This includes current bank statements for all accounts of household members, including retirement, investment, property accounts. Printouts of balances are not applicable, bank statements are needed.
- Live-in care provider verification (if applicable).
- Case Manager prepares complete Referral Packet for Lane County. Referral packet must contain the following:
  - Completed Move On Matrix assessment that includes:
    - HMIS ID
    - Case Manager Signature
    - Supervisor Signature
  - Completed “Lane County Move On Continuum of Care Local Preference Referral Form.”
  - Completed HUD Form 92006 Emergency Contact Form. Be sure to write in “Copies of Correspondence” and check the “Other” line on this form so you can receive copies of all correspondence from Homes for Good and best help your client navigate the Section 8 process.
  - A copy of this “Move On Process Checklist” (as completed so far)
  - Case Manager emails Referral Packet to [HSDHelpDesk@lanecountyor.gov](mailto:HSDHelpDesk@lanecountyor.gov). Note, this can be an email with separate attachments and does not need to be in one combined PDF.

Next, Lane County staff will:

- Review the Referral Packet for completeness and basic move-on criteria. Lane County staff will contact you with any questions or clarifications.
- Copy you on correspondence with Homes for Good to let you know that your client has been referred for a Section 8 Continuum of Care Local Preference voucher.

Homes for Good staff will then:

- Mail Application Packet to client, invite client to a Section 8 Briefing, and email the Case Manager that this has been initiated.

### **Step 5: Helping the Client Use their Voucher**

While there is a Local Preference for people moving on from Permanent Supportive Housing to a Section 8 voucher, it is possible that a voucher may not be immediately available when your client applies. If that is the case, you may have to wait until a voucher becomes available.

Once your client has a Continuum of Care Local Preference Section 8 voucher, it is the time to help them navigate the transition. The client remains in the Permanent Supportive Housing program until they are leased with their Section 8 voucher.

- Case Manager attends Section 8 briefing with client.
- Case Manager works with client to follow Section 8 voucher process, including providing necessary documentation and fully completing the Application for Section 8

Housing. This will be mailed to the household. Part of the application is a HUD 92006 Emergency Contact Form. Complete this form AGAIN to ensure that you continue to receive all correspondence from Homes for Good. Homes for Good honors the most recent HUD 92006 received. Be sure to write in “Copies of Correspondence” and check the “Other” line on this form so you can receive copies of all correspondence from Homes for Good and best help your client navigate the Section 8 process.

Client will have 14 business days from the mailing of the Application for Section 8 to provide the required documentation to Homes for Good.

Client will have 120 days to find a unit that meets their Gross Rent Limit.

Case Manager works with client throughout Section 8 process, including navigating finding new housing as necessary.

Case Manager ensures that client has social support and knows who to call/connect with to remain independent. Continually affirm and celebrate this transition. Consider a graduation ceremony or housewarming party for the client.

Client remains in Permanent Supportive Housing program until they have moved in/leased up with a Section 8 voucher. If client is unable to lease in the private market or transition to a Section 8 voucher, client remains in Permanent Supportive Housing program.

Once client has signed lease and has “Moved On” to Section 8, exit them from your program.

Ensure client submits a new HUD 92006 Emergency Contact Form to Homes for Good to remove you as a person who receives copies of all correspondence.