

SANTA CLARA COUNTY
HOMELESSNESS
PREVENTION SYSTEM
COVID-19 RESPONSE

HPS-CV
Policies and Procedures Manual

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I. PROGRAM DESCRIPTION

The Homelessness Prevention System COVID-19 Program (HPS-CV) is a special, time-limited COVID-19-related assistance program that assists Extremely Low-Income (ELI) Santa Clara County residents who have been impacted by the COVID-19 pandemic and are unable to pay their full rent and/or need financial assistance in order to remain stably housed.

A. Funding Allocations

1. City of San José ERAP Federal Funding from US Dept of the Treasury and City of San José CDBG funding:

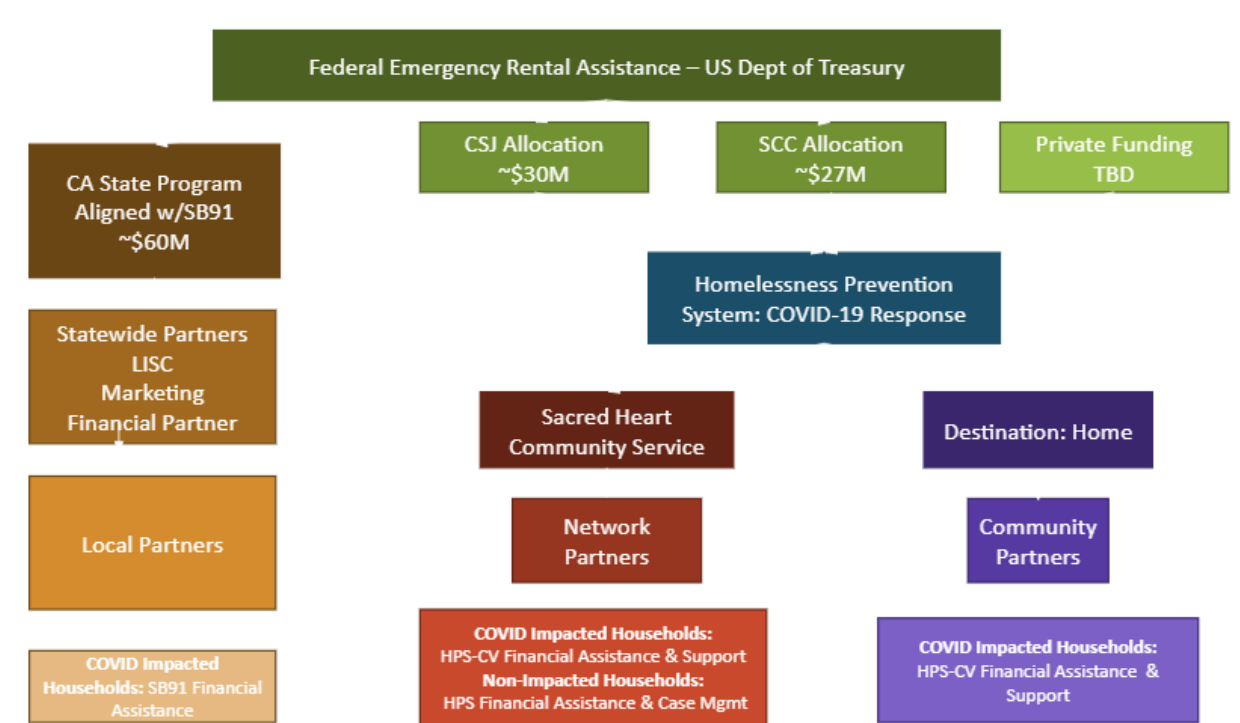
- Rental assistance for City of San José (CSJ) residents
- Personnel expenses for processing applications of CSJ residents only
- 10% overhead expenses
- Funding available through December 31, 2021

2. Santa Clara County ERAP Federal Funding from US Dept of the Treasury (SCCE):

- Rental assistance for residents of Santa Clara County
- Personnel expenses for processing applications of non-CSJ residents
- 10% overhead expenses
- Funding available through December 31, 2021

3. Private funding through Destination: Home (DH)

- Limited funding for rental assistance for eligible households unable to receive federal funds.
- Possible limited direct client assistance, funding amounts to be determined based on funding availability.



B. Partner Roles and Responsibilities

1. Destination: Home (DH) HPS-CV Team

Overall leadership of project; coordination and oversight of Community Partners

2. SHCS HPS Network Coordination Team

Coordination and oversight of Network Partners; oversee phone and email information and referrals

3. HPS-CV Community Partners

Outreach; assistance with application submission; review; provision of financial assistance through the County of Santa Clara; confirmation payments received and cashed; follow up with applicants; monthly and program-end reporting.

4. HPS-CV Network Partners

Outreach; assistance with application submission; review and approval; provision of financial assistance (internally or through the County of Santa Clara); confirmation payments received and cashed; follow-up with applicants; quarterly and program-end reporting.

Network Partners

Asian Americans for Community Involvement (AACI)
Amigos de Guadalupe
Bay Area Community Health (BACH)
Community Services Agency of Mountain View and Los Altos
Community Solutions
Family Supportive Housing
HomeFirst
Housing Choices
ICAN
Latinas Contra Cancer
LifeMoves
Maitri
Next Door
Sacred Heart Community Service
The Salvation Army
St. Joseph's Family Center
Sunnyvale Community Services
West Valley Community Services
YWCA Silicon Valley Golden Gate

Community Partners

Asian American Center of Santa Clara County
Bill Wilson Center
Bridge Communities
Carry the Vision
Catholic Charities
Child Advocates of Silicon Valley
Deaf Counseling, Advocacy and Referral Agency

Friends of Hue
Gilroy Compassion Center
Grace Solutions
Healing Grove
International Rescue Committee
Korean American Community Services
Luna
Midtown Family Services
PARS Equality Center
Roots
Sewa International
Silicon Valley Independent Living Center
St Vincent de Paul Morgan Hill
St Vincent de Paul San Jose
Sunday Friends
Teen Success
The Health Trust
Vivo

II. STAFF AND VOLUNTEER TRAINING AND CONFIDENTIALITY

A. General Guidelines and Training

All information collected for HPS-CV that is related to an applicant, their household members, or their landlord/property owner is considered confidential and must be handled with high standards of privacy and security. Confidential information should only be viewed or shared in order to carry out your duties as described in this Policies & Procedures Manual. Confidential information must not be disclosed to a third party without the member's consent to release such information.

All staff and volunteers working on HPS-CV are required to attend or watch recordings of the following trainings:

- Policies & Procedures #1 (4/27) - Required
- P & P #2 - HPAT & application overview (4/28) - Required
- Unqork Training (5/3) - Required
- Compliance Training (5/5) - Required for at least one staff per agency
- Best Practices (5/13) - Encouraged

B. Confidentiality and the HPS-CV Release of Information

In order to ensure confidentiality, the following policies must be adhered to:

1. All staff and volunteers implementing HPS-CV or accessing Unqork must review, sign, and follow the HPS-CV Staff and Volunteer Confidentiality Agreement.
2. All applicants must sign an attestation through Unqork before submitting their application or complete the HPS-CV Release of Information consenting to share basic information in cases where staff or volunteers assist households with completion of the HPS-CV application. However, applicants may refuse to sign the HMIS ROI and be entered into the HMIS database anonymously. See Section III. B. for additional information.
 - o Exception: Survivors of domestic violence, sexual assault, and human trafficking who are assisted by victim service providers will only share personal information with the agency that is processing their application.
3. Staff and volunteers must explain to the applicant what information needs to be shared with the applicant's landlord and only communicate with the landlord after the applicant has agreed to this communication.
4. Staff and volunteers utilizing the HMIS database must be authorized and trained HMIS users and must follow all HMIS policies and procedures.

Agencies must take appropriate measures to protect hard copy and electronic files and communication, such as: maintaining hard copy files in a secure, locked location and protecting computers and online communication with appropriate electronic security, including password protection.

Training videos, the Confidentiality Agreement, and additional resources are located in the [HPS-CV Partners Shared folder](#).

III. ACCESSIBILITY

HPS-CV Partners are expected to follow common eligibility requirements and assessment and intake procedures to ensure equitable levels of access, fairness, and efficiency for all families that seek services. Households will be enrolled based on client choice of agency and referrals from other community organizations, regardless of zip code. All partner agencies will make services accessible to non-English speakers through the use of staff

language expertise, Language Line, and use of translated program documents (in Spanish, Vietnamese, and Mandarin).

Access through Community and Network Partners

HPS-CV relies on Community and Network Partners’ connection to high-risk communities, cultural competence, language abilities, and capacity to provide services quickly and efficiently. Due to limited program capacity, community outreach will be limited in scope; HPS-CV does not intend to conduct large-scale public announcements or outreach. Any efforts to provide outreach to Partners’ existing networks or the community at large should be targeted to households that are least likely to ask for assistance or to have the capacity to apply if they are not proactively approached by the organization. All outreach should particularly prioritize communities most severely impacted by the pandemic, such as City of San Jose zip codes 95110; 95111; 95112; 95116; 95122; and 95127.

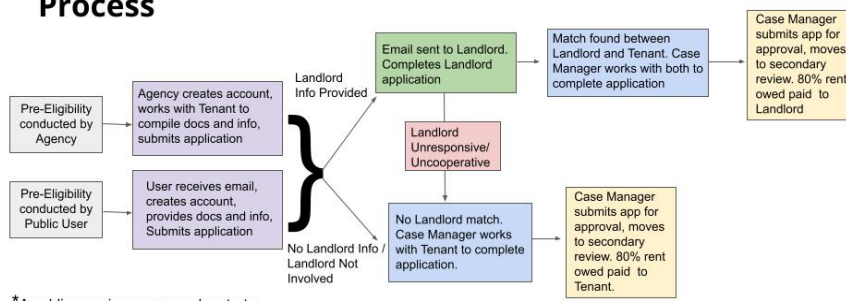
Network and Community Partners will respond to all requests for assistance by completing Pre-Eligibility screening questions. Households that meet eligibility criteria will be assisted with registration and completion of a full Application. COVID-impacted households with Very Low or Low Incomes should be referred to the State rental assistance program (housingiskey.com). Households that are not eligible for HPS-CV or the State program but do meet the Homelessness Prevention System (HPS) eligibility requirements (Santa Clara County resident, Low Income, housed and at-risk of homelessness, seeking mortgage/deposit assistance) should be screened for enrollment in HPS; Network Partners will perform HPS screenings, and Community Partners should refer potentially eligible households to a Network Partner for further assistance by providing HPS contact info: 408-926-8885 or housinginfo@sacredheartcs.org or a link to the HPS flyer at www.destinationhomesv.org/homelessness-prevention/.

Access through other community resources

Santa Clara County residents can also get information through the Homelessness Prevention System referral phone line and email: (408) 926-8885 or info@PreventHomelessness.org. Program Materials are available in English, Spanish, Traditional Chinese, and Vietnamese.

IV. DISPATCH AND ASSIGNMENT PROCESS

Overview of the HPS-CV Application Process



Application for HPS-CV assistance will be managed through the Unqork application, which consists of three distinct sections: Pre-Eligibility, Application, and Review & Approval. All components will be completed in sequence within Unqork but are also available in paper form and/or pdfs for accessibility and for DV agencies, which are not able to enter any client data into Unqork.

Assignments will be managed by a Dispatch team who will triage and assign applicants needing assistance arriving through the following channels:

- HPS phone line (408-926-8885), managed by Family Supportive Housing
- Emails (info@preventhomelessness.org or housinginfo@sacredheartcs.org), managed by SHCS
- Clients working on Unqork on their own who click the help button. Unqork will handle technical support questions, and the rest will be referred to the Dispatch team

The Dispatch team will field questions from applicants at different stages of the process:

1: General questions from people who haven't started the Unqork process

- To the extent possible, based on volume and capacity, basic questions (*what's this program about? what's the status of my state application?*) will be answered by FSH/SHCS and referred to 211 or the State's housingiskey.com website as appropriate
- Questions requiring additional follow up (*I don't have a lease, am I eligible? I want to apply but don't know how to upload documents*) will be sent to the Dispatch team

2: Questions from applicants who have started the process in Unqork and are stuck and looking for help

- Applicants may have only gotten as far as Pre-Eligibility, in which case the partner agency will need to start the process from the beginning
- For applicants who have already registered and created an account in Unqork, the partner agency can help the applicant continue their application
- In cases where an applicant has encountered difficulties and a partner cannot troubleshoot or help them continue with their application, the partner can start a new application on behalf of the client and mark the tenant's original application as a duplicate.

3: Applicants with questions about the status of the Application they completed and submitted through Unqork.

Applicants from all three groups will be assigned to partner agencies based on network and program capacity. All partners will be asked to track data on their capacity and share regular updates on how many applicants they are working on in-house and their ability to take additional assignments.

Important Note: People are often stressed and confused about the process and motivated to look for assistance and answers from multiple sources - especially people who have applied to the State program but haven't heard anything back. We anticipate a large number of people may seek help from multiple agencies and programs. To avoid duplication and simplify the process for the people we are serving, as soon as taking an assignment, partners should immediately check HMIS and Unqork to see if the applicant is already working with another agency, or potentially has an application in process. In the initial conversation, it is critical to ask applicants: **Have you already applied to the State at housingiskey.com? Have you talked to any other local agencies about assistance?**

V. UNQORK SECTION 1: PRE-ELIGIBILITY

Note: Unqork performs best in Chrome but is also compatible to work in other browsers (Edge, Safari, Firefox. It is NOT compatible with Internet Explorer).

A. Eligibility Criteria

Target Population for Santa Clara County's Homelessness Prevention System COVID-19 (HPS-CV): Extremely Low-Income households impacted by COVID-19 who are at high risk of homelessness/eviction. Following our HPS philosophy, we prioritize those with the greatest risk and fewest options for alternative support.

HPS-CV Eligibility Criteria

- Resident of Santa Clara County
- Loss of income or other financial hardship due to COVID-19. The list below is located in the Unqork tenant application:
 - Laid off/Furloughed
 - Work hours reduced
 - Unemployed for more than 90 days
 - Lost job
 - Cannot work in order to take care of others
 - Employer closed business due to public health order
- Extremely Low-Income (at or below 30% AMI) see chart on the next page (**any one** of the following is considered sufficient documentation)
 - 2020 annual income or income over the past 60 days.
 - Documentation must be provided for each adult in the household.
 - Self-certification is acceptable for household members with no income or if documentation is not available.
 - Households may also document their income eligibility by providing proof of enrollment in a federal, state, or local benefits program that requires verification of income under 30% AMI. The verification must be on or after January 1, 2020.
- At risk of homelessness or housing instability (self-certification of **any one** of the following through questions in Unqork is sufficient)
 - Inability to pay rent
 - Past-due utility or rent notice or eviction notice;
 - Self-certification through response to the application question regarding past due rent or utilities and need for future rent or utilities assistance;
 - A score of 9 or higher on the Homelessness Vulnerability Assessment (HPAT) section of Unqork - called Housing History questions (note, higher scores may still be eligible, using any of the other criteria mentioned above)
- In need of rental assistance – HPS-CV assistance is available only for households that rent their home or mobile homeowners applying for rental assistance with their space; homeowners are not eligible.
- Not currently enrolled in a rental assistance program, such as Rapid Rehousing, Permanent Supportive Housing, or the Homelessness Prevention System that provides both income-based rental assistance and supportive services (note that households currently enrolled in the Homelessness Prevention System may be able to transfer to HPS-CV through the HPS agency with which they are enrolled).
 - Households that receive one-time assistance, such as Season of Sharing, may still be eligible as long as the one-time assistance does not pay for the same rent as HPS-CV.
 - Households that receive assistance from the State rental assistance program may not receive assistance with the same rent paid for the State.
 - Recipients of CFAP Phase 1 or Phase 2, or CEHPP funding may be eligible for additional funding through HPS-CV. NOTE: HPS-CV rental payments cannot overlap with one-time CEHPP rental assistance payments. See Section G #3 below for additional details.
 - Section 8 households are eligible for assistance through HPS-CV but can only receive assistance with the household's portion of rent.

A "household" is defined as a group of people who live in the same home, depend on the same income, and share the same food. If there are multiple families or individuals living in the same home who do not share their

income or food, they may be considered different households. Ask your liaison for clarification on complicated cases.

Santa Clara County 2021 Area Median Income (AMI) Chart

Income Level	Income Limits by Household Size							
	1	2	3	4	5	6	7	8
Low Income (LI) <i><80% of the Area Median Income</i>	\$82,450	\$94,200	\$106,000	\$117,750	\$127,200	\$136,600	\$146,050	\$155,450
Very Low Income (VLI) <i><50% of the Area Median Income</i>	\$58,000	\$66,300	\$74,600	\$82,850	\$89,500	\$96,150	\$102,750	\$109,400
Extremely Low Income (ELI) <i><30% of Area Median Income</i>	\$34,800	\$39,800	\$44,750	\$49,700	\$53,700	\$57,700	\$61,650	\$65,650

B. Unqork Pre-Eligibility Process

The Pre-Eligibility section of Unqork will be used to screen households and direct them to the program for which they are eligible: HPS-CV, the State housingiskey.com program, or other resources, such as HPS. Pre-Eligibility can be completed independently by applicants or can be filled out by trained staff using self-reported responses from the applicant. If Pre-Eligibility screening shows that the household is eligible, they may move forward with a full application.

Pre-Eligibility questions may also be used, to the extent possible, by FSH and SHCS staff answering public emails and phone calls to provide helpful information to the Dispatch team about what type of support people need.

Applicants should be reassured that no information about immigration status will be collected anywhere in the application process, and participation in HPS-CV will not affect Public Charge.

C. HPS-CV Release of Information (ROI)

All applicants who are screened for HPS-CV will be tracked through the program-wide Unqork database, and therefore must authorize the release and exchange of confidential information between agencies participating in the program. An HPS-CV Release of Information (ROI) will be embedded in the Unqork portal and will be completed through the Application. Applicants without access to sign electronically can sign a paper ROI that staff should upload into Unqork. Staff must make every effort to obtain a hard copy and should consider mailing or dropping off the form for households with access challenges.

In extreme circumstances, some individuals may be unable to sign the HPS-CV ROI. In these cases, staff may complete an HPS-CV Release of Information Verbal Consent Validation form for applicants. It is a last resort and should only be used when the alternative would be denying the applicant for HPS-CV because they have no reasonable way to sign the ROI. Partners should consult with their HPS-CV Network Coordination Team before completing a verbal consent form.

DV Agencies must maintain a signed HPS-CV ROI (or Verbal Consent Validation) in the application file for all households that complete an application for at least five years from the end of the project and must be made available upon request.

D. Households Determined Ineligible and Denied based on Pre-Eligibility

At the point of completing the screening tool it may be determined that the applicant does not meet eligibility criteria for currently available funds. In these situations, the staff member or volunteer should provide the applicant with information about other community resources and share information about COVID-19 tenant protections and how to contact the Law Foundation if their landlord is violating these protections.

Community Partners

Screen for any other assistance programs your agency offers

Refer to HPS if ELI, scored 9 or higher on Housing History questions (COVID impact not required)

Network Partners

Screen for HPS and then any other assistance programs your agency offers

VI. UNQORK SECTION 2: APPLICATION

A. Account Registration

Households who meet pre-eligibility criteria are able to advance to the Application section of Unqork, where detailed information is provided including household, income, and rental information; necessary documents are uploaded; and self-certifications, ROIs, and signatures are collected. At this point the applicant must create an account in Unqork, including a username and password. The applicant can create an account to proceed on their own, or an agency can create an application on behalf of the applicant.

B. HPAT - Unqork Household History

The Homelessness Prevention Assessment Tool (HPAT) is a new revised version of the PR-VI-SPDAT assessment tool used to determine eligibility for the Homelessness Prevention System (HPS) program. It is incorporated into the HPS-CV Application in Unqork. **For HPS-CV there is no minimum score requirement** for eligibility. However, if a household scores 9 or higher on the Household History questions, this can be used as documentation of housing instability required for the HPS-CV program and also means they are eligible for the HPS program if their application for HPS-CV is ultimately denied.

C. Required Documentation

Households must verify their eligibility for HPS-CV by providing required documentation. In order to reduce barriers to assistance, HPS-CV accepts self-attestation in place of some types of required documentation. In some cases, self-certifications within Unqork are acceptable. A comprehensive self-attestation is the final signature and release of information that must be signed before submitting an application. Self-attestations completed by a partner on behalf of the applicant should include the case manager's name and agency, as well as "on behalf of 'applicant name'" in the "Type Your Signature" space (e.g. SHCS *My Name* on behalf of *Client Name*).

APPLICATION REQUIRED DOCUMENTATION

Note: [Additional information](#) and [Documentation Examples](#) is available in the HPS-CV Partners Shared folder.

1. Identification for ALL Adult household members (if possible, please scan horizontally and enlarged, so images are easy to read)

Acceptable forms of ID for adults (expired IDs are acceptable):

Driver's License or ID Card issued by any state in the USA

Photo ID card issued by a foreign government, including cards issued by the Mexican Consulate.

Passport issued by the USA or any foreign government

Combination of 1) Official document with full name and date of birth (e.g. birth certificate or medical records) and 2) Identification with full name and photo (e.g. employee badge or credit card with photo)

If a household member does not have any of these forms of ID, please check in with your program liaison for guidance on how to proceed.

2. **Address Verification (Identification with current address, medical/utility/bank bills, employer, or school letter with address clearly displayed)**
3. **Income Verification (or self-certification within Unqork)**
4. **Lease or documentation of rental agreement (see chart below)**
5. **Documentation of rent owed by the tenant (see notes under CEHPP section of duplicates)**
6. **HMIS Release of Information**

ACCEPTABLE RENT DOCUMENTATION RESOURCE CHART

	Rental Assistance to be paid to <u>LANDLORD</u>	Rental Assistance to be paid to <u>TENANT</u>
Landlord Match in Unqork	Required	NA
Lease	Alternative verification possible if not available (notice of past due rent, eviction notice, rent ledger)	Agreement (lease/sub-lease if available; informal written confirmation) with person they lease from, if available; Sublease Verification Document)
Verification of Residency	Lease	ID, recent mail, bills, school registration
Verification of Monthly Rent	Lease	Agreement with person they lease from; bank withdrawal statements, receipts, or money orders; self-certification; Sublease Verification document)
Verification of Rent Owed	Landlord Application Completed (property manager must have name included on lease or written confirmation they are authorized)	Confirmation with person they sublease from (email, written, verbal with case file documentation, Sublease verification document)
Verification of Property Owner	TIN of Property Owner in Unqork, verified by Middesk	NA

D. Documentation of Rent and Fair Market Rent (FMR)

1. Verification of Rent and Fair Market Rent (FMR)

If a household can provide acceptable verification of the amount of rent, as outlined in Section V, subsection C. Required Documentation, the monthly rental assistance provided by HPS-CV may exceed Fair Market Rent (up to 150%).

***FMRs are updated annually and are effective October 1st each year unless otherwise noted by HUD.**

Below is the FMR for FY 2021 (effective 10/1/20) and FY 2022 (effective 10/1/21).

[HUD-Approved Fair Market Rent \(FMR\) for Santa Clara County](#)

Information provided by Department of Housing and Urban Development (HUD) Website.

FMRs By Unit Bedrooms					
Year	Efficiency	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
FY 2022 FMR	\$2,145	\$2,418	\$2,868	\$3,687	\$4,213
FY 2021 FMR	\$2,228	\$2,558	\$3,051	\$3,984	\$4,593

150% of FMRs By Unit Bedrooms					
Year	Efficiency	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
FY 2022	\$3,217	\$3,627	\$4,302	\$5,530	\$6,319
FY 2021	\$3,342	\$3,837	\$4,576	\$5,976	\$6,889

2. Self-Attestation of Rent and Fair Market Rent

If a household is unable to provide documentation of the amount of rent, they may provide a self-attestation. However, if the rental obligation is only documented through self-attestation, the monthly rental assistance provided by HPS-CV may not exceed Fair Market Rent. Self-attestation of rent is a **one-time exception** that can be used to provide assistance with past due rent and the initial three months of forward rent. If a household needs additional forward rental assistance, they must provide documentation of their monthly rent when they apply to recertify their eligibility for additional forward rental assistance

Example Scenarios:

1. a). If a client provides acceptable documentation for a rental obligation of \$4,000/monthly for a two-bedroom housing unit, they would **qualify** for \$4,000/monthly rental assistance provided by HPS-CV. Even though the client’s rental obligation exceeded the FY 2021 FMR for a two-bedroom housing unit (\$3,051), the client would qualify for rental assistance up to \$4,576/monthly, the 150% FY 2021 FMR limit so long as they meet all other program criteria. Please note that although the client would qualify for rental assistance up to \$4,576/monthly, the maximum assistance provided would be \$4,000/monthly because of the rental obligation amount listed in the documentation provided.

b). If that same client provides acceptable documentation for a rental obligation of \$4,600/monthly for a two-bedroom housing unit, they would **qualify** for \$4,576/monthly rental assistance provided by HPS-CV. Even though the client’s rental obligation exceeded the HPS-CV limit of 150% FY 2021 FMR (\$4,576), the client would qualify for rental assistance up to the maximum limit of \$4,576/monthly so long as they meet all other program criteria.
2. a). If a client provides self-attestation documentation of a rental obligation of \$3,000/monthly for a two-bedroom housing unit, they would **qualify** for \$3,000/monthly rental assistance provided by HPS-CV.

Since the client's rental obligation is under the FY 2021 FMR limit (\$3,051) and they provided self-attestation documentation they would qualify for rental assistance up to \$3,051/monthly, the FMR limit. Please note that although the client would qualify for rental assistance up to \$3,051/monthly, the maximum assistance provided would be \$3,000/monthly because of the rental obligation amount listed in the documentation provided.

b). If that same client provides self-attestation documentation but their rental obligation is \$3,100/monthly for a two-bedroom housing unit, they would **qualify** for \$3,051/monthly rental assistance provided by HPS-CV. Even though the client's rental obligation exceeded the FY 2021 FMR limit (\$3,051), the client would qualify for rental assistance up to the maximum limit of \$3,051/monthly so long as they meet all other program criteria.

Refer to the Acceptable Rent Documentation table above for a summary of types of documents accepted.

E. Landlord Participation

For tenants who apply and provide landlord contact information, landlords will receive an email / text sent directly from Unqork. In order to receive payment directly, the landlord must provide:

- Tax Id # (TIN)
- property information
- verification of rent owed
- signed attestation, including an agreement to accept HPS-CV payment received as payment in full for past rent due and agreement to apply forward rent payment to corresponding time period

Applications can also be processed without landlord participation. Payment will be made to tenant:

1. If the landlord is unresponsive:
 - a. The partner agency must make at least three contact attempts by phone, email, and/or text message over a ten calendar day period.
 - b. All contact attempts must be documented in Unqork.
2. If the landlord declines to participate:
 - a. Confirm that the landlord is declining to participate in the program and is not just struggling with the application. Offer help with the application.
 - b. If possible, get the refusal to participate in writing.
 - c. If the landlord is not willing to respond in writing, follow the Verbal Refusal Process

Landlord Verbal Refusal Process

A Refusal Request Script document is available in the Documents subfolder.

- Follow the script for calls and voicemails.
 - Clarify that the landlord is declining to participate. Offer help with the application if that's the barrier.
 - **Document the conversation** in the application file including the date, the name of the person you spoke with, and what they said to decline participation.
 - **Send a follow-up email or letter** documenting that the landlord refused to participate.
3. If the landlord cannot be contacted:
 - a. This scenario only applies if contacting the landlord is unsafe or would put the applicant's housing at risk, e.g. if the landlord does not know that the applicant is subleasing a room in the unit.
 - b. If the landlord cannot be contacted, the financial assistance must be funded by private funding. Private funding is extremely limited; therefore, this option should be used only when no other option is available.

NOTE: It is absolutely critical that staff make every effort to follow the standard protocols and landlord requirements because flexible funding for payment to the tenant is extremely limited.

F. Principal Tenant (PT) acting as Landlord

In subleased situations, particularly when it is unsafe to contact the Landlord, the Principal Tenant (the person who has the lease with the Landlord) may act as the landlord for their sublessee who is applying for HPS-CV assistance. In this scenario, the Principal Tenant will be treated as equal to a landlord in all aspects of the HPS-CV rental assistance application and payment process.

When to consider this option:

When there is a Principal Tenant (PT) in the place of a Landlord (LL) working with a sublessee.

- When the rent debt is owed to the Principal Tenant by the sublessee
 - Possible scenarios
 - The LL is already paid by the PT
 - The LL has not been paid by the PT, but the PT does not want to apply for ERA on their own for the sublessee's debt
 - When it is unsafe to contact the LL due to subleasing
 - The PT and sublessee both are applying for assistance

Documents that need to be provided:

- A PT lease
- A W9 from the PT
- A complete Sublease form
- A document that can show the rent has already been paid to the LL by the PT or can show the rent is still owed to the LL for the subleased unit.
 - Rent ledger
 - Bank statement
 - Online portal screenshot
 - Rent receipts
 - Statement from the LL
 - In the form of email/text/ handwritten
- All other required documents for program participation

Processing changes:

- Need to perform a duplicate check (in HMIS and with the State) for both PT & sublessee

What it looks like in Unqork:

- Add the PT info in place of the LL info
 - Adding "PT" in front of the PT's First Name in the LL name field.
 - The case manager will need to also leave a comment w/in Unqork "PT is acting as LL"

Important things to communicate to the PT:

- If the PT agrees to participate and be the recipient of the rental assistance payment directly through this program, **it will be considered taxable income and they will receive a 1099 from KeyPoint Credit Union with the payment information**

- If the PT declines to be the recipient of the payment, the payment will go to the sublessee applicant. In this case, we are not able to enforce how they use the money
 - In order to decline participation in the program we require a written statement from the PT stating that they do not want to participate in the program. This must be uploaded to the application. The case manager will need to also leave a comment w/in Unqork “PT is declining to participate.”
- The Middesk check will be done using the PT’s Social Security number
 - If the PT does not want to provide their SSN, it will be considered a refusal to participate and if the application is approved the payment will be made out to the sublessee
 - The refusal to participate will be documented and a confirmation will be sent in writing to the PT

F. HMIS ROI

The Application in Unqork will require households to create an account and provide identifiable information which will eventually be uploaded into HMIS. The HMIS ROI is only required for the head of household. It is uploaded at the time the application is submitted. Partners will need to work with the household to ensure the HMIS ROI is filled out properly, and then upload the document to the Unqork portal. If a valid ROI already exists in HMIS, you can upload that into Unqork; doublecheck the expiration date to be sure it will be valid for the duration of the HPS-CV program.

G. Duplication Checks

HPS-CV assistance may only be accessed once per household and cannot be accessed by households who are currently enrolled in rental assistance programs that provide income- based rental assistance and supportive services, such as Rapid Rehousing, Permanent Supportive Housing, and the Homelessness Prevention System (note that households currently enrolled in the Homelessness Prevention System may be able to transfer to HPS-CV through the HPS agency with which they are enrolled). Households having previously received financial assistance from the COVID-19 Financial Assistance Program (CFAP) or COVID Emergency Homelessness Prevention Program (CEHPP) are eligible to receive HPS-CV assistance. Households who have received assistance from the state ERAP program (housingiskey.com) are not eligible for HPS-CV assistance.

All partners must ask households if they are receiving rental assistance from any other source including one-time assistance or other programs outside HMIS. Even if a household is not enrolled in an ongoing rental assistance program, they may not receive rental assistance from HPS-CV if another program is paying for the same rent (i.e. two programs cannot duplicate payments for the same month and portion of assistance). The applicant will need to sign a certification that they are not receiving duplicate assistance as part of their application.

Upon initial contact with an applicant, partners are responsible for asking if the applicant, or another member of their household, has:

- Applied to the State program at housingiskey.com (if they have not yet been approved, they may apply for HPS-CV, but their application will be canceled if they receive State assistance before their HPS-CV application is approved)
- Worked with any local agency to receive rental assistance (may be eligible for HPS-CV)

In addition, a duplicate check process will be required in the following 4 places:

1. Within HPS-CV

Once an application has been submitted in Unqork, possible duplicate applications will be flagged in the Case Manager view under Related Cases. Case Manager will be required to review the details to confirm whether or not they are duplicate applications. In the event a duplicate entry is discovered, the Case Manager should contact the Dispatch Team. Dispatch will then communicate directly with both agencies and ask the first agency to have worked with the household to continue processing the application. They will also share the name of the duplicate agency to ensure a smooth transition and facilitate the sharing of information.

The DH and SHCS HPS-CV Teams will also conduct regular duplication checks in order to catch any HMIS duplicate entries that might be overlooked due to the timing of applications and data entry.

2. Other Assistance Programs (HMIS)

Network Partners will be responsible for checking HMIS for duplicates.

Community Partners with HMIS access will be responsible for performing an HMIS check for duplicates. For agencies who are not in HMIS, the DH HPS-CV Coordination Team will perform the HMIS check for duplicates and inform the Community Partner if the household may proceed with intake.

Instructions for completing HMIS duplication checks:

Search HMIS for all households applying to CEHPP by **date of birth and last name of all adults in the household**. If nothing initially appears, try searching by full name, then the name in different combinations if the client has multiple names. Also try searching DD/MM/YYYY as sometimes the date of birth is entered backwards. It can also be helpful to search for the first and last name using only the first 3 letters, in case the name has been spelled incorrectly.

If any adult in the household has an HMIS account, open the Programs Tab, and look for Active enrollments. Look for **Rapid Rehousing (RRH), or Permanent Supportive Housing (PSH) or (CCP)**. If the household is actively enrolled in one of these programs, they are not eligible for HPS-CV and should be instructed to contact their Case Manager for additional support rather than continuing an application. If it is unclear if a program is a rental assistance program or if the applicant says they have exited the program, but it still shows active in HMIS, check-in with the HPS-CV Team for guidance.

Households that are currently enrolled in the **Homelessness Prevention System (HPS)** should be referred back to their HPS provider for further assistance and/or transfer to HPS-CV (all HPS providers are part of the HPS-CV network). Households that were previously enrolled in the Homelessness Prevention System (HPS), but have been exited, may be screened for eligibility in HPS-CV or re-enrollment in HPS (if they are not COVID impacted).

3. CEHPP

Households having previously received financial assistance from the COVID-19 Emergency Homelessness Prevention Program (CEHPP) are eligible to receive HPS-CV assistance, but it cannot duplicate assistance provided under CEHPP, i.e. rental assistance can only be provided for portions of rent not already paid for through CEHPP (100% of rental arrears from March-August 2020 and 60% of arrears from September-January 2021)

For an HPS-CV applicant who previously received CEHPP funding, the following rules apply:

- 1) No rent owed from April-August 2020 can be paid under any circumstance.

- 2) HPS-CV can pay up to 100% of 40% of rent owed Sept 2020-Jan 2021. (Since CEHPP provided assistance with 60% of arrears, the most HPS-CV can offer is assistance with the remaining 40% of arrears due. If households used any direct client assistance from CEHPP, or any other personal contributions were made to pay for a portion of their rent, this also needs to be deducted from the rent due.)
- 3) HPS-CV can cover up to 100% of past due rent and forward rent payments for any time after February 2021.

If a household received CEHPP funding, an entry will be found within HMIS for the CEHPP Head of Household. Please refer to the HMIS duplicate check instructions above for best practices. Contact your HPS-CV liaison for any questions about allowable assistance for CEHPP recipients, including if confirmation is needed about which months and amounts of assistance were provided through CEHPP.

4. With the State ERAP Program ([housingiskey.com](https://www.housingiskey.com))

After an application has been reviewed and approved by a Case Manager and Supervisor, it will automatically be sent for a State Duplicate Check. HPS-CV Network Coordination Team members will notify you when an application has been cleared and is ready to be processed further.

Note: Network Partners AACI, Community Solutions, Maitri, NextDoor Solutions, and YWCA provide services specifically to survivors of domestic violence and therefore cannot share information in Unqork or HMIS. These agencies will track households served and services provided in a separate spreadsheet and will have separate duplication check protocols to avoid duplication.

H. Closed (Formerly Known As Denied) Applications

- 5 Types of Closed Applications (previously Denied):
 - Referred to State (Closed) (over ELI, lives outside of Santa Clara County)
 - Closed – Ineligible (no COVID impact, homeowner, etc.)
 - Closed – Insufficient Funding (don't use; may be utilized in the future)
 - Closed – Unresponsive (tenant doesn't respond after 15 business days)
 - Closed – Withdrawn (applicant requests to withdraw their application)

A Notice of Application Closure will be generated in Unqork for Closed apps and those referred to the State. The Notice will be automatically generated when the case is moved to Closed Status.

Lots of additional detail is provided in the [slides from the Supervisor Presentation](#) provided to Network Partners, but here is a quick summary of steps **for Supervisors** to follow:

Download and **Send the Notice** to the Tenant and Landlord (if participating)

- Saved in the Closed Determination section in Unqork
- Also Available to Tenants & Landlords on their Dashboard

All denied applications must be migrated to one of the closed statuses:

- Move all of your agency's denied applications back to "In Supervisor Review"
- Re-review the application to confirm it should be closed.
- Starting Weds 9/15, click on the button in Supervisor Review for the correct Closed Status.
- **Download and send the Notification** to the Tenant & Landlord
- Note: Do NOT bulk action denied applications to the new closed status – this will not generate the Notification.

All partners should review Denied applications and confirm if they should indeed be closed; most importantly, doublecheck those applications that are Closed - Ineligible for not having a COVID Impact. People often don't understand our definition of a COVID impact, so have a conversation if necessary to see if their income was negatively impacted by COVID (which the majority of households were). A few Pro Tips on determining if there was a COVID impact:

- Did they lose income at any time during the pandemic due directly or indirectly to the impacts of COVID-19? This could include a lost job, reduction in hours, reduction in business for people who are self-employed, etc. It can also include a loss of financial support from a family member who lost income due to the pandemic.
- Did they have additional expenses due to the pandemic? For example, signing up for internet to attend online appointments or work, Uber/Lyft expenses to get to appointments in order to avoid exposure on buses or other public transit, delivery costs for food or medicine due to quarantining or avoiding exposure, etc.
- Did they experience delays in obtaining employment during the pandemic due to the fact that the economy was shut down?

I. Application Withdrawals

Whenever possible, Unqork records should indicate a reason applications have been withdrawn by the applicant and a [withdrawal form](#) should be uploaded. A clear written request (e.g. email or text) can also be used. If an applicant withdraws from HPS-CV because they also applied to the State, the application should be marked as Referred to State, NOT Withdrawn. This is extremely important because the notifications for those statuses have a different meaning if the landlord shows them in court.

VII. UNQORK SECTION 3: REVIEW & APPROVAL

After an application has been completed and submitted, it will go to the Review & Approval process. In Unqork, this process is called "Case Management". Network and Community Partners will be responsible for review and verification of all documentation and sign off by supervisory staff at your agency.

The Review and Approval process will be facilitated through Unqork. The Case Manager role conducts the Review, and the Supervisor role is responsible for Approval.

VIII. FINANCIAL ASSISTANCE CALCULATION AND PROCESSING

Eligible households may receive the following financial assistance:

A. Rental Assistance

Up to 15 months of total assistance, which may include up to 12 months of assistance for Rental Arrears and Future/Prospective Rent, per the following guidelines:

1. Rental Arrears, defined as any unpaid rent due between April 1, 2020 and the date the applicant applied for assistance
 - a. 100% of total rent owed, up to 12 months
 - b. If a household owes more than 12 months of arrears, HPS-CV will assist with the 12 months for which the highest amount is owed.
2. Future/Prospective Rent, defined in Unqork as rent owed for the month the application was submitted in Unqork, plus 3 subsequent months (e.g. 5/28/21 enrollment, Prospective Rent would be amount

owed for May, June, July, and August. To determine the date an application was submitted, check the Days Open column in the Case Manager Dashboard.

- a. 100% of total rent owed
3. Prospective Rent Renewals Households who have not yet received 15 months of assistance when they are first served (i.e. those who needed less than 12 months of Rental Arrears) may be eligible for additional Prospective Rent assistance of up to 3 months per Recertification. Per federal guidelines, households may only receive more than 12 months of assistance (total combined between arrears and future/prospective rent) if it is necessary to ensure housing stability. Therefore, households should only be recertified to receive months 13-15 of assistance if they continue to be Extremely Low Income and at-risk of homelessness or housing instability.

NOTE: As of November 9, 2021, all **PENDING** applications reviewed and approved by HPS-CV are eligible for future rent through December 2021, as long as total months of assistance still falls within the 15-month maximum limit. Previously, HPS-CV would only approve applications for future rent owed in the application month plus 3 subsequent months, as outlined in Section VIII, subsection A under guideline #2 (for example, an application submitted in August 2021 would be potentially eligible for September, October, and November 2021; under the policy change, approved applicants would also receive December 2021 rental assistance so long as they meet all other program criteria and have not exceeded 15 months of assistance). The policy change provides more assistance and a longer window to apply for additional assistance through the State to applicants whose applications are still in PENDING status after waiting lengthy application processing times.

B. Rental Assistance Recertification

Recertification rental assistance amounts will be determined at a later date based on funding availability. Recertification will be handled through Unqork. More detailed information will be provided in future revisions.

C. Direct Client Assistance

Eligible households will also receive a direct client assistance payment of \$1,000 per household. Direct client assistance is available only through the initial application; recertification is for assistance with rent only.

Financial Assistance will be automatically calculated in Unqork, or through a Financial Assistance Calculation worksheet available for agencies not utilizing Unqork.

Separate checks should be processed for rental and direct client assistance. The first rental check will include arrears and the first three months of prospective rental assistance.

D. Additional Review of High Dollar Rental Assistance Requests

Rental assistance payments of more than \$15,000 or cumulative rental assistance payments of \$20,000 or more will undergo an additional approval process, requiring HPS-CV Coordination Team review and additional confirmation of partner due diligence, including staff confirmation of due diligence before acceptance of self-certifications. Additional process instructions will be provided soon

E. Assistance Calculation and Processing in Unqork

Unqork will automatically calculate 100% of the rent owed as payment amount.

F. Centralized Payment Processing

HPS-CV Community Partners will utilize a centralized payment processing option through the County of Santa Clara; Network Partners have the option to utilize the County institution or provide financial assistance directly from their organization. For partners utilizing the County system, all HPS-CV payments approved by your organization will be processed by the County through their vendor, KeyPoint Credit Union. The County may change vendors over the course of the program.

After a signed Grant Agreement has been submitted in Unqork, the application will automatically be sent to the HPS-CV Network Coordination Team for processing. An Unqork payment report containing details for processed applications will be provided in a Citrix Shared Folder. Supervisors will receive an auto alert each time a payment file is uploaded. For Partners utilizing KeyPoint for financial assistance payments, this will be your record of payments sent out. For Partners providing financial assistance internally, you will use the payment file in Citrix to process payments. It is up to each agency to design a process around payments to ensure you download the correct file and do not duplicate payments to applicants. Agencies processing payments internally are responsible for tracking all agency payment data (check number, date, cleared status).

NOTE: We no longer split payments with the State. As of August 9, 2021, if the Duplicate Check indicates that the State has paid, the local program application should be closed and status updated to “Referred to State.” Case managers should support the applicant in reaching back out to the State to re-open their application to apply for additional forward rent, if needed. If they don’t receive payment from the state or the State denies their application for additional forward rent, they can come back to request assistance from HPS-CV.

G. Confirmation of Payment Receipt

Partners will be responsible for confirming both direct client assistance and rental assistance checks were received and cashed. Additional information about this process for Partners using the County’s KeyPoint system will be provided as details become available.

H. Tax Implications

Generally, HPS-CV payments are considered emergency assistance, which are typically not considered as taxable income. For landlords, these payments will be treated as ordinary rental income with the same tax liability as if they had been paid directly by the tenant. Answers about specific scenarios are available [here on the IRS FAQs webpage](#) about Emergency Rental Assistance. Specific questions should be confirmed with a tax specialist.

I. Hotel Policy

HPS-CV can provide rental assistance to households whose primary residence is a hotel or motel, as long as the following criteria are met:

- The household has been temporarily or permanently displaced from its previous primary residence and does not have a permanent residence elsewhere.
 - If possible, case managers should collect documentation about the household’s displacement from their prior primary residence. However, if documentation is not available, the case manager may document the situation in case notes in the application.
- The household considers the hotel/motel to be their primary residence and they have lived there for a continuous 30 days or more.
 - Exceptions to the 30 day stay requirement can be approved by HPS-CV Network Coordination for brief absences or occasional moves between hotels/motels, due to inability to pay, being

required to move by the hotel/motel, or other incidental time away (e.g. to visit family or any other typical absence that a household might have from their primary residence).

- Hotel/motel expenses may not include incidental charges to the room.
- Hotel/motel room expenses may not exceed \$125 per night plus taxes.
 - Exceptions can be approved by HPS-CV Network Coordination when there is a reasonable justification for a higher cost, such as changes in the market rate or a reasonable need to stay at a hotel in a high cost area within the County (for example, needing to stay in a high cost area because it is near school/work/medical appointments and the household does not have access to reliable transportation).
- If the hotel/motel resident is eligible for and has access to a permanent housing program, such as Permanent Supportive Housing or Rapid Rehousing, they will not be provided hotel/motel assistance regardless of whether they refuse the other housing intervention.

IX. RECERTIFICATION/REAPPLICATIONS AND FOLLOW UP

A. Recertification/Reapplication

People who haven't received 15 months of financial assistance after their initial application may be eligible for additional assistance. Recertification (for households with income eligibility confirmed through monthly income verification) or reapplication (for households with income eligibility confirmed through annual income verification) will be required, and households will need to continue to meet HPS-CV eligibility requirements (ELI, at risk of homelessness or housing instability). If eligible, households may be eligible for assistance with 3 months of forward rent per recertification/reapplication, until the 15-month maximum assistance threshold is met.

Steps to be completed for Recertifications and Reapplications:

- Recertifications ONLY (*for Reapplications, where annual income was provided, income documentation will not change*): Verify current monthly income; Confirm total household income is currently below 80% AMI (Low-Income or lower; note **ELI is still the income eligibility requirement for all new applications**)
- Enter requested assistance amounts
- Confirm HMIS ROI is not expiring and upload HMIS ROI in the recertification/reapplication application
- Confirm an HPS-CV ROI has been signed electronically or uploaded for the app
- Perform an HMIS duplicate check on all adult household members
- Submit all cases for a second State Duplicate Check
- Upload Lease documents if there has been any change
- Provide ID/Income/Address verification for new adult household members

B. Follow-up

Partners are responsible for following up with households within 3 months from providing rental assistance. It is recommended you start to reach out early in the 3rd month to allow time for multiple attempts to be made. Staff should first determine if the household is in need of additional assistance, and if they are eligible for Recertification/Reapplication (refer to eligibility requirements above). If they are not eligible or no longer need assistance, staff should document their response to a question about improved household stability after receiving assistance. This assessment will be used to capture data for contract reporting. A [Follow Up document](#) is available with a sample script to help make these calls.

Partner agencies must maintain records of all attempts, completion, and outcome of follow-up calls, which will be required for program reports.

Households experiencing any difficulties with their landlords not following COVID-19 tenant protections should also be referred to the Law Foundation.

X. CONFLICT OF INTEREST

A. Staff Conflict of Interest

HPS-CV staff members and volunteers may not process screenings or applications for family (immediate or extended), friends, or coworkers. Staff members also must not give priority or preference to family members, friends, or coworkers, including processing or encouraging a teammate to process, an application preferentially to benefit a friend, family member, or coworker.

If an HPS-CV staff member or volunteer is contacted by a potential applicant (either directly or through a referral) and identifies that the potential applicant is a family member, friend, or coworker, the staff member must stop the screening or application process and notify their supervisor. The supervisor will re-assign the screening/application to another staff member or partner agency that does not have a conflict. If necessary, the supervisor should contact their liaison for guidance on reassigning the application to a neutral partner agency.

B. Agency Conflict of Interest

In addition to the scenario described above in which a staff member is requesting assistance, an HPS-CV partner agency may also have a conflict of interest if the agency, the Executive Director, or a member of the Board of Directors, is the property owner or property manager for a unit for which rental assistance is requested. If such a conflict is identified, the agency must notify the DH/HPS Network Coordination Team for guidance on reassigning the application to a neutral partner agency.

XI. APPEALS

If an applicant wishes to appeal a decision to close an application, they should be directed to the manager of HPS-CV services at the agency that denied them to try to resolve the issue. Applicants have 7 days from receiving the Notification to appeal the decision. Appeals should first be heard at the agency that processed and closed the application. If it cannot be resolved at that level, the appeal should be forwarded to the DH HPS-CV or HPS Network Coordination Team.

If the applicant wishes to go forward with an appeal to Destination: Home or Sacred Heart Community Service, they should submit an email to the HPS-CV Coordination Team at Support@preventhomeslessness.org. To facilitate the process please ask them to include Appeal Request in the subject line and include as much information as possible, including application number if available. Please let your liaison know about any appeals being made by your clients so the Coordination Teams can watch for them and respond promptly.

For denied applicants who don't have access to email, please reach out to your liaison and a phone number will be provided or the Coordination Team will arrange to reach out to the applicant directly.

If after review, the decision remains, the applicant will be notified of the final decision. If the decision is overturned, the DH or HPS Network Coordination Team will notify the partner agency, who will then notify the applicant. The partner agency will update and process the application.

NOTE: If the applicant was first unresponsive, the application can be re-opened. The applicant may have additional information that can change the original determination

XII. REPORTING REQUIREMENTS

Reporting for the HPS-CV program will be required at the end of the program, as well as monthly for Community Partners and quarterly for Network Partners. Report templates and additional instruction will be provided.

XIII. DOCUMENT LOCATION AND TRANSLATIONS

Documentation and resources for the HPS-CV Program will be shared through the HPS-CV Partners Shared Folder in Google. Whenever possible, links have been included throughout this Policies and Procedures Manual. Forms will continue to be added, revised, and updated, so please utilize the HPS-CV Partner Shared Folder to access all of the latest resources. Always feel free to reach out to your liaison if you're having trouble finding something you need.

Access to all forms in the HPS-CV Partners Shared Folder is View Only. All of these documents are templates that should be downloaded and saved to your computer before working on them. After you have downloaded, they can be opened in Word, Excel, Google Sheets or Google Docs for your use without affecting the original document. It is strongly recommended that you use each document in the application in which it was created (i.e. if it was an Excel doc, download and manipulate in Excel, not Google sheets). Documents downloaded and opened in different programs are likely to have formatting and calculation problems.

Spanish and Vietnamese versions of all documents are also located in the Google folder. Contact your liaison if you are unable to find a translated document.

XIV. PROGRAM MONITORING

All applications submitted by Community Partners will be reviewed by members of the DH HPS-CV Coordination Team. At least the first five applications submitted and approved by Network Partners must be reviewed by their liaison. Liaisons will also conduct random file reviews throughout the program to ensure compliance. In addition, the first three applications that are denied by Network Partners or Community Partners must be reviewed by your agency liaison.