



# Housing Transition & Tenancy Sustaining (HTTS) Service Training Guide

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## ACKNOWLEDGEMENTS

The planning and development of this Housing Transition & Tenancy Sustaining (HTTS) Service Training Guide was made possible by the collaborative expertise and contributions of the following organizations who share a commitment to the self-determination of all people:

- Pennsylvania Health Law Project
- Values into Action – PA
- Pennsylvania Assistive Technology Foundation (PATF)
- Regional Housing Legal Services

This Guide and its content were developed by the collaborating organizations with funding from the Pennsylvania Developmental Disabilities Council. This guide reflects the lessons learned through two separate Person Directed Housing grant projects and the facilitation of five Housing Transition & Tenancy Sustaining pilot training sessions. These sessions were held virtually and included gathering feedback from participants. We are grateful to those who have helped to improve the content. We hope the curriculum will continue to evolve as the Pennsylvania disability community continues to promote and expand the use of this important service.

## HOW TO USE THIS GUIDE

The HTTS Service Training Guide represents the culmination of five years of learning, teaching, and reflecting on best practices in supporting people to control where and with whom they live. This HTTS Service Training Guide can be used by organizations to educate their employees to learn how to access housing resources and programs, and to know how to inform and refer others to housing programs and resources. Having employees who understand and know how to provide a broad range of housing support enables the provider to meet the provider qualifications to deliver the Housing Transition & Tenancy Sustaining (HTTS) service in Pennsylvania to individuals funded through Office of Developmental Programs (ODP) waivers.

This Guide focuses on the role and responsibilities of a HTTS service provider working in the Office of Developmental Programs system. Designed to be user friendly and instructive, this Guide should assist facilitators who lead the education and development of HTTS service providers in Pennsylvania. The Guide provides step-by-step instructions for delivering the content. It should be used consistently by approved Facilitators in organizations offering the HTTS service.

## PREPARATION AND SET-UP

These lessons are designed to be interactive. An ideal audience is 20-25 participants.

### Virtual Meeting Space

Select a virtual platform that can accommodate accessibility needs of the participants and can create break out rooms to facilitate small group activities.

### Materials

Each participant should be provided with the agenda in advance with other items distributed by the facilitator at the appropriate time per the curriculum. Additionally, session participants should receive copies (electronic or paper) of the PowerPoint slides in this Guide and all resources related to the curriculum. Or alternatively the participants could be given a list and access to the resources on the internet.

# Introduction

TITLE: Housing Transition & Tenancy Sustaining (HTTS) Service Training

Time: 10 minutes



Housing Transition & Tenancy Sustaining Service  
Introduction

1

[Slide 2]

The facilitator welcomes everyone, introduces the presenters and asks participants to introduce themselves by sharing:

1. Name, where they are from and a little background (this can be structured based on size of group)
2. Their expectations for the training

The facilitator explains:

1. Agenda including break schedule
2. Cell phone use
3. Materials provided and how they will be used

## **Welcome!**

- Introduction of presenters
- Accessibility Needs
- Housekeeping

2

[Slide 3]

The facilitator reads the slide.

## Virtual Classroom Expectations

- You must have a computer or tablet and internet connection to participate.
- You must attend and participate in the entire webinar with your camera on in order to get confirmation of attendance.
- Registrants should block out time to attend class just as you would if class were being held in person. Please plan to be in a quiet location with minimal distractions.
- If you experience any technical difficulties during class, you should contact [susanr@viapa.org](mailto:susanr@viapa.org) promptly. If the issue cannot be resolved quickly, you may be asked to attend a future re-certification class.
- Please be respectful of your facilitators and others in the virtual classroom.

[Slide 4-5]

The facilitator states:

We will be covering a great deal of information in this training. Let's review the learning objectives together.

The facilitator reads the slides.

### Learning Objectives

- Demonstrate core competencies for providing Housing Transition and Tenancy Sustaining Services (HTTS)
- Explore the role of the HTTS service in furthering values consistent with Everyday Lives, HCBS Final Rule, Person-Centered planning, Charting the Lifecourse Framework, and the Principles of Self-Determination
- Identify Pennsylvania housing options and supports and how to access and utilize

### Learning Objectives, cont.

- Provide guidance and resources regarding sample Housing Assessment and individualized Housing Plan templates used by one organization.
- Introduce Prepared Renter Education Program (PREP) Training, Cents and Sensibility, and tools from LifeCourse Framework
- Provide guidance and resources to support people in sustaining their housing

[Slide 6]

This slide acknowledges the project partners, the funding source, and the copyright.



## Acknowledgement

This training was developed by the PA Health Law Project, Values Into Action, PA Assistive Technology Foundation and Regional Housing Legal Services with grant funding from the Pennsylvania Developmental Disabilities Council. It is the culmination of five plus years of collaborative work.

The Pennsylvania Developmental Disabilities Council is supported by the Administration for Community Living (ACL), U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$3,095,416.00 with 100 percent funding by ACL/HHS. Council efforts are those of the grantee and do not necessarily represent the official views of, nor an endorsement, by ACL/HHS, or the U.S. Government.

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# Module 1

TITLE: SETTING THE STAGE TO ALIGN HOUSING WITH THE HOME & COMMUNITY BASED SERVICES FINAL RULE

Time: 40 minutes



Housing Transition & Tenancy Sustaining Service  
Setting the Stage to Align Housing with the Home & Community Based Final Rule

1

[Slide 2]

The facilitator states:

To set the tone for this training, we thought we'd start with this video. It's called In Their Own Words: The Dignity of Independence. This video was created by the Pennsylvania Health Law Project through the PA DD Council Person Directed Housing project and shares with us the essence and importance of having one's own home. It runs about 9 minutes.

The facilitator plays the video.

In Their Own Words: The Dignity of Independence

<https://youtu.be/H2pWR6y8tEs>

2

ACTIVITY: The facilitator states:

Take a minute to think about the video we just watched. When you're done, we'd like you to describe what a home means to you. Everyone's definition may be different, and

that's ok. Just share how you might describe a home if you were explaining it to someone else.

NOTE: If meeting in person, the facilitator will ask for volunteers. If meeting virtually, attendees can put it in the chat and the facilitator will read them to the group.

[Slide 3]

The facilitator states:

In the next series of slides, we will focus on elements of the Housing Paradigm and the impact of the beliefs, decisions and practices that inform the provision of HTTS services.

The facilitator reads the slide.

**Identifying the Housing Paradigm**

What is a Paradigm?

"A system of beliefs, ideas, values, and habits that is a way of thinking about the real world."

<https://simple.wiktionary.org/wiki/paradigm>

NOTE: It is recommended that the following slides [4-12] be facilitated by a self-advocate.

[Slide 4]

The facilitator states:

If you take nothing else away from this training, please take this. Nothing about me without me. I'll say that again. Nothing about me without me. That means, when you're helping people, like me, to plan for their housing, don't do anything without checking with us first. Listen to us, in whatever way we're able to communicate. Always presume we are competent. We are the experts of our lives, we know what we want, and we will find a way to tell you what you need to know. We have a right to make our own choices and decisions. If you want us to select you as our provider, you need to treat us with the respect we deserve. We are always at the center of the service planning, even when we invite others to help us plan and realize the dream of having our own home.

To put it simply, presuming competence means you believe that the person seeking housing has the potential to develop their thinking, learning, and understanding of what

is needed to obtain a home of their own and the provision of HTTS services are done with the person. Planning must start with supporting the person to identify their housing goals and preferences and how these goals and preferences fit into their vision of a meaningful life.

ACTIVITY: If anyone else has thoughts or examples of presuming competence, please feel free to throw them in the chat.



### Presuming Competence

“Nothing About Me Without Me”

[Slide 5]

The facilitator states:

The Olmstead Decision is one of the most important civil rights decisions for people with disabilities in our country's history. On June 22, 1989, the Court ruled that the ADA prohibits unnecessary segregation of people with disabilities, who have a right to live and receive services in the most integrated setting appropriate. So, what does this mean in the context of this training?

- It means funding must be made available to support people's right to control their own housing.
- We all know that with rights come responsibilities, so while I have the right to choose where I live, I also have the responsibility to make the decisions and accept the consequences (good or bad) of those decisions.
- If you feel that people must be “ready” to make their housing decisions, where and with whom they live, let go of that assumption. Olmstead gave us the right to decide and to live in the most integrated setting appropriate.

This is the beginning of the foundation for the rest of the day. As we move forward, remember that housing is a fundamental value established by the Olmstead decision but unfortunately, not all individuals and families know yet that housing options exist.

## Impact of The Olmstead Decision

- The Olmstead Decision is one of the most important civil rights decision for people with disabilities in our country's history.
- On June 22, 1989, the Court ruled that the ADA prohibits unnecessary segregation of people with disabilities, who have a right to live and receive services in the most integrated setting appropriate.
- The foundation for Home and Community Based Services.

[Slide 6]

The facilitator states:

Most of us are familiar with the Everyday Lives principles. These principles have guided the Office of Developmental Programs and the service system since the first publication of Everyday Lives in 1991. If you're not familiar, there's a link on this slide to access the 30<sup>th</sup> anniversary updated version.

Now I'm going to quote directly from the document because it is so well written. In 1989, the Pennsylvania Office of Developmental Programs (ODP) invited people with disabilities, families, advocates, governmental officials, and service providers to think about what the future should look like for all people with disabilities. Pennsylvania had been a national leader in creating community services as an alternative to institutional services, but it was time to think more deeply about what the purpose of community services should be, what kinds of experiences and opportunities people should have and what the overall outcome should be. For months, participants conducted research about best practices and discussed their findings. Most importantly, the planning group asked people with intellectual disabilities what was important to them. The result was a list of Everyday Lives principles that has guided ODP and the service system since Everyday Lives was published in 1991. Deeply rooted in the concept of self-determination, Everyday Lives promotes the belief that, with the support of family and friends, people with disabilities can and should decide how to live their lives. Unquote. The Everyday Lives document provides a context for Housing Transition and Tenancy Sustaining services. A few fundamental principles outlined in the document that address this statement are:

- Community Integration through choice of what the person wants, and homes can be chosen in the neighborhoods they view as community.
- The ODP Information Sharing and Advisory Committee's (ISAC) Recommendation and Strategies beginning in 2016 and continuing into the 2022/23 #10 is Expand Options for Community Living. It goes on to explain further. Expand the range of housing options in the community so all people can live where and with whom they want to live. Listening to people with disabilities and their families, providers and Support Coordinators will help people locate affordable and accessible housing, find housemates, and identify housing

resources and supports and other government benefits that, when blended with natural supports, will promote an everyday life.

### Everyday Lives: Values In Action

- Identifies Community Integration as the Goal
- Everyday Lives Recommendation #10 "Expand Options for Community Living"

ODP+Annual+Data+Report+FY21-22.pdf (amazonaws.com) pgs. 59-62  
[Everyday+Lives+2021+FINAL.pdf \(palms-aws3-repository.s3-us-west-2.amazonaws.com\)](#)

[Slide 7]

The facilitator states:

So, how does the Home and Community Based Settings (HCBS) final rule apply to the work?

You need to become familiar with the Chapter 6100 regulations. In that document, there is a statement. "A service location shall be integrated in the community and the individual shall have the same degree of community access and choice as an individual who is similarly situated in the community who does not have a disability and who does not receive an HCBS."

There's another statement I want to point out. "No more than 25% of the units in an apartment, condominium or townhouse building may be newly funded in accordance with this chapter on or after February 1, 2020. The exceptions relating to a duplex, two bi-level units and two side-by-side apartments in § 6100.444(a)(1) and (b)(1) apply." There are links to resources on this slide. I recommend you follow the path and review them, and make sure you refer to the Chapter 6100 regulations throughout your practice.

Because this service includes pre-tenancy and housing sustaining supports to assist participants in being successful tenants in private homes owned, rented or leased by the participants, the housing location cannot be owned by the service provider. This means the housing is separate from the supports.

## HCBS Settings: The Final Rule

- 6100.443 Integration
- 6100.445 cap on % of waiver participants
- Separation of Housing and Supports

Resource:  
Temple U Institute on Disabilities <https://disabilities.temple.edu/hcbs/>

[Slide 8]

The facilitator reads the slide and states:

But finding safe affordable housing can present many barriers.

In 2023 in Pennsylvania, the maximum amount a person with a disability can receive from Supplemental Security Income benefits is \$914 per month. If a person did not receive any other income, based on the recommended ratio of rental costs being 30% of a person's monthly income, this person could only afford a place that rents for \$275.

This information is important as it identifies one of the challenges you may encounter when assisting in the safe, affordable housing search.

## The State of Housing for People with I/DD and Autism

In 2023 in Pennsylvania, a person with a disability received Supplemental Security Income (SSI) benefits equal to **\$914** per month.

- <https://www.ssa.gov/oact/cola/SSI.html?sub5=24398702-B696-7944-95DC-6E0D910C25E>
- [https://www.hud.gov/program\\_offices/public\\_indian\\_housing/programs/hcv/landlord/fmr](https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/landlord/fmr)

[Slide 9]

The facilitator states:

Within Pennsylvania's federally defined housing market areas, the cost of a one-bedroom rental unit ranges from a low of 68% of SSI payments in the Sharon housing market area (which is in the western PA region) to a high of 128% in the Pike County housing market area (which is in northeast PA).

The information on this slide provides a sample of rental costs for a one-bedroom apartment around the state of Pennsylvania.

As you can see, a person with a disability who is dependent on \$914/month to live is at a distinct disadvantage.

### 2023 Fair Market Rent Values in PA

One Bedroom Rental Units in:

- Dauphin County = \$975
- Allegheny County = \$904
- Bucks County and Philadelphia Area = \$1218
- Lehigh County = \$1102
- York County = \$883

[FY 2023 Fair Market Rent Documentation System – Statewide Summary for Pennsylvania \(huduser.gov\)](#)

[Slide 10]

The facilitator states:

Based on the figures from the areas listed in the previous slide, a person with a disability receiving SSI of \$914 per month would have to pay 93% of their monthly income to rent an efficiency unit and 106% of their monthly income for a one-bedroom unit.

### The State of Housing for People with I/DD and Autism

A person with a disability receiving SSI would have to pay 93% of their monthly income to rent an efficiency unit and 106% of their monthly income for a one-bedroom unit.

Source: "Priced Out- The Housing Crisis for People with Disabilities" Technical Assistance Collaborative (2021 PA data): <https://www.tacinc.org/resources/priced-out/>

[Slide 11]

The facilitator states:

The figures we just discussed help us to understand why so few individuals rent or own their own homes. As of the writing of this training guide, 11% of individuals receiving Office of Developmental Programs (ODP) services rent their own home. And only 1% own their own home. The hope is that by providing the HTTS service, your work will improve these numbers.



## State of Housing for People with I/DD and Autism, cont.

Just 11% of individuals receiving Office of Developmental Program (ODP) services rent their own home and just 1% own their own home

- Data from Everyday Lives 2022 RECOMMENDATIONS, STRATEGIES AND PERFORMANCE MEASURES, Recommendation 10
- There's No Place Like Home™ Council on Quality & Leadership & the ARC (2019) <https://www.c-q-l.org/resources/guides/theres-no-place-like-home-a-national-housing-study/>

11

[Slide 12]

The facilitator reviews the key takeaways and provides an opportunity for the group to ask questions.

## Key Take Aways

- Always presume competence!
- The Olmstead Decision is the foundation for Home and Community Based Services.
- Everyday Lives: Values In Action identifies community integration as a goal.
- Per 6100 Regulations, a service location shall be integrated in the community and the individual shall have the same degree of community access and choice as an individual who is similarly situated in the community who does not have a disability and who does not receive an HCBS.
- It can be challenging, but not impossible, for people with disabilities to find affordable housing.

12

[Slide 13]

This slide acknowledges the project partners, funding source, and the copyright.

## Acknowledgement

This training was developed by the PA Health Law Project, Values Into Action, PA Assistive Technology Foundation and Regional Housing Legal Services with grant funding from the Pennsylvania Developmental Disabilities Council. It is the culmination of five plus years of collaborative work.

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## Module 2

TITLE: Introduction to Housing Transition and Tenancy Sustaining Services

Time: 50 minutes

[Slide 1]

The facilitator states:

Housing is a social determinant of health. Housing that is stable, affordable, and meets the needs of those who are aging or have disabilities is critically important and can result in positive health outcomes, a higher quality of life, and savings that can be reinvested in healthcare systems. Appropriate housing is often hard to find and obtain. Additionally, it is often difficult for individuals to maintain their homes in their community.

The Housing Transition and Tenancy Sustaining (HTTS) service was established to assist individuals with staying in their own private homes, regardless of whether the home is rented, leased, or owned by the individual. The use of the Housing Transition and Tenancy Sustaining service is available through the Consolidated, Person/Family Directed Support, and Community Living waivers.



Housing Transition & Tenancy Sustaining Service  
Introduction to Housing Transition and Tenancy Sustaining Services

1

[Slide 2]

The facilitator states:

Here is the link to the Consolidated waiver. We will review the service definition during this training and recommend you refer to it throughout your practice.

## HTTS Service Definition

Housing Transition and Tenancy Sustaining Services

<https://www.dhs.pa.gov/Services/Disabilities-Aging/Documents/Developmental%20Programs/Consolidated%20Waiver%20Renewal%20Jan%202023.PDF>

2

[Slide 3]

The facilitator states:

The HTTS service is designed to help people be successful in obtaining and sustaining a home that they own, rent, or lease. The HTTS service includes pre-tenancy and housing sustaining support to assist individuals in being successful tenants in private homes owned, rented, or leased by the participants.

The facilitator will then explain direct vs. indirect services.

- a. Direct Services – Direct contact with the person (Face-to-face, by phone, and virtual communications)
- b. Indirect Services - Activities that cannot be billed include driving to appointments, completing service notes and progress notes, and exploring resources and developing relationships that are not specific to a participant's needs as these activities are included in the rate.

## HTTS Service Overview

- Pre-tenancy and housing sustaining supports to assist participants in being successful tenants in **private homes** owned, rented or leased by the participants.
- Includes direct and indirect services provided to participants.

3

[Slide 4]

The facilitator will read the slide and then states:

We are looking for homes that anyone can access, regardless of their disability. A key part of the HTTS service is that it is focused on living in a "private home" as the primary goal. The private home is key when assisting a person to move. A private home is a

home that is owned, rented, or leased by the participant. Homes owned, rented, or leased by a provider are not private homes. Homes owned, rented, or leased by a provider and subsequently leased to a participant or his or her relatives are also not private homes.

### Waiver Definition of “Private Home”

- A home that is owned, rented or leased by the participant.
- Homes owned, rented or leased by a provider *are not private homes.*
- Homes owned, rented or leased by a provider and leased to a participant or his or her relatives *are also not private homes.*

[Slide 5 & 6]

The facilitator states:

Helping someone figure out housing may seem like a jigsaw puzzle, because it is just like that and the HTTS service has a place in that puzzle, but it isn't the entire puzzle. This and the next slide demonstrate what the HTTS is not. It's important to look at what the HTTS service is not as too often there is a general misunderstanding of the service.

- HTTS is not an emergency housing service – we don't provide immediate/temporary/emergency housing.
- HTTS does not provide the money for housing – it does provide support to the person to identify and access resources available for use.
- HTTS is not a real estate service but does work to build resources and connections to potential landlords and housing options.
- HTTS is not legal aid – we do not offer legal advice...again the HTTS provider helps a person to identify legal resources.
- It's also important to understand that HTTS was not designed to be a stand-alone service that will guarantee affordable housing of the participant's choice with all the needed supports.

### HTTS Service

This service is not:

- Emergency Housing Supports or Services
- A Financial Provider
- Real Estate Services
- Legal Aid

### HTTS, continued

- HTTS *does not fund housing costs*
- HTTS providers are not real estate agents and *do not have primary responsibility* for finding a house or apartment for the participant
- HTTS providers are not responsible to provide or obtain emergency housing for a participant

[Slides 7 & 8]

The facilitator states:

We know what HTTS is not, now let's talk about what it is. The HTTS service is designed as a service that works with the participant and their team to identify the participant's housing choices and what is needed to obtain and maintain that housing, and then work with the participant and their team to reach the identified housing outcomes identified in the individual's Housing Plan.

The facilitator reads the slides.

### HTTS Service and the Housing Puzzle

This service is:

- A transitional and tenancy sustaining service
- *An indirect and direct service* to help build skills and plan for Housing support needs
- A service that works with the participant and their team to identify:
  - ✓ What is needed to obtain and maintain housing
  - ✓ Participant's housing choices
  - ✓ Action steps to reach identified housing outcomes

[Slide 9]

The facilitator states:

Role delineation is vital to be successful in supporting someone to live in their own home. The Service Definition for the HTTS service focuses on 4 primary components:

- a. Conducting a tenant screening and **housing assessment** that identifies the participant's preferences and barriers related to successful tenancy.
- b. Developing an **individualized housing support plan** based upon the housing assessment.
- c. Assisting with and/or **identifying resources** needed to implement the housing support plan.
- d. Assisting participant in **maintaining housing once leased or purchased**.

And each of these roles should incorporate the concepts and philosophy of person-centered planning throughout the development and implementation of an individual housing support plan.

#### 4 Major Activities

- Conducting a tenant screening and Housing Assessment
- Developing an *individualized* Housing Support Plan
- Assisting with and/or identifying housing resources
- Assisting with maintaining housing

[Slide 10]

The facilitator states:

- a. The HTTS service is available to individuals using Person/Family Directed Supports (PFDS), Community Living and Consolidated waivers (HTTS is not available for persons on the Adult Autism Waiver).
- b. Some Administrative Entities have approved base funding.
- c. The HTTS service is not available for participants authorized for residential habilitation, life sharing or supported living except when:
  1. A participant wants to move from a provider-managed residential home into a private home.
  2. A participant in Supported Living needs assistance in identifying appropriate, sustainable housing and in developing a Housing Plan.

#### Participant Eligibility

- Individuals enrolled in the Person/Family Directed Supports (PFDS), Community Living or Consolidated waiver (*Not available for persons on the Adult Autism Waiver*)
- Possible Base Funded Option
- Not available for participants authorized for residential habilitation, life sharing or supported living *UNLESS*:
  - A participant seeks to move from residential services to a *private home*
  - A participant in Supported Living needs assistance in identifying appropriate, sustainable housing

[Slide 11]

The facilitator reviews the key takeaways and provides an opportunity for the group to ask questions.

## Key Take Aways

- HTTS created in response to 2016 Everyday Lives Document to "Expand Options for Community Living"
- Available in Consolidated, Community Living and P/FDS Waivers
- Direct and Indirect Service
- HTTS is Not An Emergency Housing Supports or Services Financial Provider, Real Estate Services or Legal Aid
- 4 major Roles of HTTS: Conducting a tenant screening and Housing Assessment, Developing *individualized* Housing Support Plan, Assisting with and/or identifying housing resources, and Assisting with maintaining housing

11

[Slide 12]

This slide acknowledges the project partners, funding source, and the copyright.

## Acknowledgement

This training was developed by the PA Health Law Project, Values Into Action, PA Assistive Technology Foundation and Regional Housing Legal Services with grant funding from the Pennsylvania Developmental Disabilities Council. It is the culmination of five plus years of collaborative work.

The Pennsylvania Developmental Disabilities Council is supported by the Administration for Community Living (ACL), U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$3,095,416.00 with 100 percent funding by ACL/HHS. Council efforts are those of the grantee and do not necessarily represent the official views of, nor an endorsement, by ACL/HHS, or the U.S. Government.

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# Module 3

TITLE: Preparing to Provide the Service

Time: 50 minutes



Housing Transition & Tenancy Sustaining Service  
Preparing to Provide the Service

1

[Slide 2]

The facilitator will read the slide and state:

To provide the HTTS service, a provider agency must be enrolled with ODP as a provider and be qualified to provide the service. Resources on provider enrollment process can be found at:

- a. Chapter 6100.81-.84
- b. ODP Provider Applicant Orientation Instructions 2.3.21
- c. Agencies must meet the following standards regardless of provider service location:
  1. Have a waiver service location in Pennsylvania, Washington DC, Virginia or a state contiguous to Pennsylvania.
  2. Have a signed ODP Provider Agreement on file with ODP.
  3. Complete standard ODP required orientation and training.
  4. New providers demonstrate compliance with ODP standards through completion of a self-assessment and validation of required documentation, policies and procedures.
  5. Have Commercial General Liability Insurance.
  6. Have Workers' Compensation Insurance, in accordance with state law.
  7. Have knowledge of and how to access, refer to, and inform others on the HTTS service and resources



## Provider Enrollment

### ODP Provider Enrollment

<https://www.myodp.org/course/view.php?id=287>

- Resources for Provider Enrollment 6100.81-84
- Providers Must Meet Enrollment Standards

[Slides 3 & 4]

The facilitator will read the slides and state:

- For agencies already enrolled with ODP as providers of any service, completion of PREP training, and this HTTS service training, coupled with familiarity with local housing resources, should meet the knowledge requirements set out in the provider qualifications.
- Service is funded by the Person/Family Directed Support, Community Living, and Consolidated Waivers
- Tenancy support services may not be authorized for participants who are authorized to receive Residential Habilitation, Life Sharing or Supported Living services.
- However, Housing Transition services may be authorized when the participant has a plan to move from the home where Residential Habilitation or Life Sharing is provided into a private home that the participant will own, rent or lease or when a participant in Supported Living needs assistance in identifying appropriate, sustainable housing.
- This service must be delivered in Pennsylvania.

### Provider Qualifications

- AEs determine whether a provider meets the qualifications for HTTS service.

***"Providers must demonstrate knowledge of HTTS and how to access, refer to, and inform others on a broad range of housing programs or resources."***

ODP Announcement 083-18

<https://s3-us-west-2.amazonaws.com/palms-aws-s3-repository/Communications/ODP/2018/ODP+Announcement+Housing+Service-083-18-FINAL.PDF>

### Provider Qualifications, cont.

- For agencies ***already enrolled with ODP as a Provider:***
  - ✓ Completion of PREP training
  - ✓ Familiarity with local housing resources
- Providing Residential Habilitation and/or Life Sharing ***does not meet the provider enrollment and qualifications for HTTS service***
- HTTS cannot be offered to individuals receiving Residential Habilitation, Life Sharing, or Supported Living services ***unless*** the purpose is to plan for a move to a person's private home

[Slides 5 & 6]

The facilitator will read the slides.

### Knowledge Requirements Per Service Definition

- Housing Choice Vouchers
- Section 811. Project Rental Assistance (PRA)
- Mainstream & Non-Elderly Disabled (NED) Vouchers
- Project Based versus Tenant Based Rental Assistance
- Low Income Housing Tax Credit properties & 20% Units
- Home ownership financing
- Fair Housing, Reasonable Accommodations
- Home Ownership
- USDA rural housing services, loans, and grants

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### Knowledge continued

- Local and regional housing resources
- Local, state, and federal housing initiatives
- Discharge Process from residential and institutional settings
- Privately funded housing opportunities
- Home Modification Funding
- Olmstead Requirements
- Housing First
- PAHousingSearch.com
- Prepared Renters Education Program Training for agencies

6

[Slide 7]

The facilitator reads the slide and explains the PREP training is recommended for HTTS providers to register and complete the training to meet the qualification standards.

### Prepared Renters Education Program (PREP)

- Free training on rights and responsibilities of tenants
- Provided by Self Determination Housing PA

<https://www.inglis.org/programs-and-services/inglis-community-services/self-determination-housing-of-pennsylvania-sdhp/sdhp-calendar>

7

[Slide 8]

The facilitator reads the slide and states:

- a. Make sure the HTTS service is flexible for the person.
- b. Ensure that the service meets the person's needs.
- c. The waivers allow flexibility to utilize this service in conjunction with other services funded by the waivers.
- d. HTTS service providers can provide other services to support a person in other areas of their life which then connect to supporting the person's housing goal, i.e., In-Home Community Supports (IHCS) and Companion Services.
- e. Refer to the waiver service definition for a list of services that cannot be provided by the HTTS provider to the same person.

### Options for Service Provision

- Waiver allows flexibility to utilize this service in conjunction with other services
- Examples include In Home & Community Support (IHCS) and Companion Services if approved in the ISP
- Review the service definition for list of services that can and cannot be provided by the HTTS provider to the same person

[Slide 9]

The facilitator reads the slide and states:

Ideally the HTTS provider, the person, and their team work together in:

- a. Assessing need, mapping an individualized housing plan, and plan implementation
- b. Identifying needed resources
- c. And fostering relationships with people and entities important to meeting the person's identified housing outcomes

### Building Relationships

Working collaboratively & respectfully

- Supports Coordinator
- Administrative Entity (AE)
- Other service providers
- The person's natural support circle

[Slide 10]

The facilitator states:

This slide provides some examples of resources for continued learning.

The facilitator reads the slide.

## Resources for Continued Learning

- Mailing lists of organizations that provide periodic trainings or informational webinars such as
  - Self Determination Housing PA  
<https://www.inglis.org/programs-and-services/inglis-community-services/self-determination-housing-of-pennsylvania-sdhp/sdhp-newsletters>
  - Pennsylvania Housing Finance Agency (PHFA)  
<https://www.phfa.org/news/newsletter.aspx>
    - Link to sign up for newsletter at bottom of web page
  - Housing Alliance of PA  
<https://housingalliancepa.org/>
  - Local Public Housing Authorities
- Develop & maintain training documentation records

10

[Slide 11]

The facilitator states:

- HTTS is a one-to-one service providing both Indirect (on behalf of person) and Direct (with person) services.
- Services are capped at 640 units (160 hours) per participant per fiscal year. Can be annualized, as needed so that an additional 640 units becomes available at the beginning of the next fiscal year, if needed.
- The current rate is \$20.24 a unit (\$80.96 an hour); \$12,953 annually.
- Note: HTTS service costs are counted towards the P/FDS and the Community Living service cap so individuals on P/FDS and Community Living may not have enough money left in their budget after the cost of other services to receive the full 640 units of HTTS service.

## Service Limitations & Rate

- Procedure Code H0043
- One-to-One Service
- Direct and Indirect Service
- Capped at 640 units (160 hours) per participant per fiscal year
- \$20.24 for a 15- minute unit (\$80.96 an hour/\$12,953 annually)

*Note: Cost is included in the P/FDS and the Community Living budget, participants may not have budget capacity to receive the full 640 units*

11

[Slide 12]

The facilitator states:

As with all ODP funded services, there needs to be a way to document and substantiate the provision of the HTTS service. Refer to the **Technical Guidance for Claims and Service Definition for Providers and Supports Coordination Organizations of Consolidated, Community Living, and Person/Family Directed Support Waiver services** as well as Targeted Support Management and Base-funded Services. The link to this document is at the bottom of this slide. Briefly, these are components of the documentation process:

- a. Documentation (Service Notes & Progress Notes)
- b. Connected to an Outcome in the ISP for HTTS
- c. Technical Guidance for Claim and Service Documentation – Link in slide
- d. Progress Notes are required for this service. Please refer to the bulletin for the requirements for progress notes.
- e. Other Documentation: The provider must retain a record of time that staff worked that demonstrates the service was provided as specified in the ISP.

The provider may choose to create and use a checklist to document the activities provided to or on behalf of the individual that satisfies the requirement for a description of activities, if it includes all other elements listed above. The checklist may include, but is not limited to:

- a. Tenant screening and housing assessment that identifies the individual's preferences and barriers related to successful tenancy.
- b. Developing an individualized housing support plan based on the housing assessment.
- c. Assistance with the process of searching for a home that is in an integrated setting that is dispersed in the community in a noncontiguous location not located on a campus setting.
- d. Assisting with the housing application process, including assistance with applying for housing vouchers.
- e. Identifying resources to cover housing expenses.
- f. Ensuring the living environment is safe and ready for move-in.
- g. Assistance with arranging for and supporting the details of a move.
- h. Developing a housing support crisis plan.
- i. For Housing Transition, the individualized housing support plan is developed based upon the housing assessment.

### Documentation Requirements

- Service Notes
  - Document Service Delivery
  - Provides a record that services have been delivered in accordance with the individual's ISP.
  - Describes the activities conducted.
  - Used to ensure the delivery of high-quality services.
- Quarterly Progress Notes
  - Evaluate whether the activities occurring as part of the provision of services are helping the individual achieve their desired outcomes (aka delivering quality services).
  - Ensure services are meeting the individual's needs over time.
- Compliance with approved activities & tasks per the current service definition

<https://www.illinois.gov/oc/pubs/communications/Documents/1108876200669A0078E9A30007/Bulletin-06-22-23-Attachment-1-BA-Report-20M-Base-Updated.pdf>

12

[Slide 13]

The facilitator states:

This slide outlines the requirements. Some indirect services, such as time spent developing an individual housing plan or connecting with potential resources for a specific client are billable. Indirect services that are not billable:

- a. Driving to appointments.
- b. Completing service notes and progress notes.
- c. Exploring resources and developing relationships that are NOT specific to a participant's needs.

It is the provider's responsibility to establish compliant billing methods that track times/dates for allowable services for billing and monitoring available units. Again, you will want to refer to the Technical Assistance document referred to on the previous page.

*NOTE: The facilitator should make sure not to get tied up in the conversations about how to process and submit billing. The focus should be on Direct vs. Indirect and Billable and not-billable activities.*

### Direct vs Indirect

- Direct Services – provided with the person
- Indirect services- *billable*
  - ✓ developing an individual housing plan
  - ✓ connecting with potential resources for a specific person
- Indirect services- *not billable*
  - ✓ Driving to appointments
  - ✓ Completing service notes and progress notes
  - ✓ Exploring resources and developing relationships that are *NOT* specific to a participant's needs

13

[Slide 14]

The facilitator reviews the key takeaways and provides an opportunity for the group to ask questions.

### Key Take Aways

- Includes pre-tenancy and housing sustaining supports to assist participants in being successful tenants in *private homes* owned, rented or leased by participant
- One-on-one Direct and Indirect services
- \$20.24 per 15 minutes
- Annual CAP 640 units (can be renewed annually, as needed)
- Available in the Consolidated, Community Living and Person and Family Directed Services (PFDS) waivers (the service is not currently available in the Autism Waiver)
- *May not be authorized if participant is authorized to receive Residential Habilitation, Life Sharing or Supported Living services UNLESS Participant has a plan in the ISP to move from home where services are provided into a private home owned, rented or leased by the participant.*

14

[Slide 15]

This slide acknowledges the project partners, funding source, and the copyright.

## Acknowledgement

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# Module 4

TITLE: Providing the Service

Time: 180 minutes with breaks



Housing Transition & Tenancy Sustaining Service  
Providing the Service

1

[Slide 2]

The facilitator reads the slide and then states:

The goal of the HTTS service is to support a person to obtain and maintain housing of their own separate from their services. This means that, if a person doesn't like their house, they can move without losing their services. Additionally, a person who doesn't like their service provider wouldn't have to move to get a new provider. When starting the HTTS service, the HTTS provider will begin by working with the person to assess their resources, skills, and support, followed by the creation of an individualized housing plan. After a housing plan is developed, the provider will assist in implementing the plan, while working with the person to continuously assess their resources, skills and supports/services that are received to figure out what is working, and what isn't.

## **Purpose of HTTS Service**

- Appropriate housing is often hard to find and obtain.
- It is also often difficult for individuals to maintain their homes in their community.
- The Housing Transition and Tenancy Sustaining Services were established to assist individuals with tenancy in their own homes, whether rented, leased, or owned.

<https://s3-us-west-2.amazonaws.com/palms-awss3-repository/Communications/ODP/2018/ODP+Announcement+Housing+Service-083-18-FINAL.PDF>

2

[Slide 3]



The facilitator states:

It is important that we identify a way to communicate with the participant. To start, we must determine what a person's preferred form of communication is, and then we need to use that preferred/effective form to communicate. There are TONS of materials and training on communication. This slide provides some resources that may be helpful.



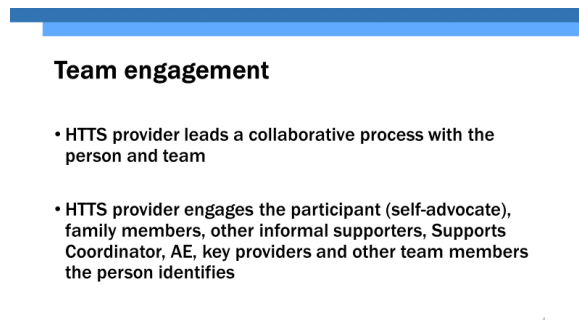
**Communicating with Participant**

- Determine and use participant's most effective form(s) of communication
- ODP materials on communication (special populations division)  
<https://www.myodp.org/course/view.php?id=978> (log in first)
- TechOWL materials on communication supports  
<https://aacccommunity.net/>
- ASERT  
<https://paautism.org/resource/communication-works-both-ways/>  
<https://paautism.org/resource/autism-interaction-communication/>  
<https://paautism.org/resource/communication-speech-talk/>

[Slide 4]

The facilitator reads the slide and then states:

The person you are supporting may have other people in their lives that help them to make decisions, engage in their communities, provide support, or may just be a friend. It's important that the HTTS provider engages in a collaborative process with the person as well as their team.



**Team engagement**

- HTTS provider leads a collaborative process with the person and team
- HTTS provider engages the participant (self-advocate), family members, other informal supporters, Supports Coordinator, AE, key providers and other team members the person identifies

[Slide 5 & 6]

The facilitator reads the slides and then states:

Sometimes team members, or even the person you support, may have fears and concerns about living on their own. Some fears may include not having enough staffing, or staff call-offs, for someone needing support. Other fears may include emergency situations or being taken advantage of by neighbors. As HTTS providers, we need to hear those concerns and fears, and help the person to address these using their

housing plan. While some things cannot be avoided, planning allows the person to take control and feel secure knowing what to do if any of their fears come true.

One way to address fears that may be unavoidable, such as staff call offs, could be reaching out to self-advocates who can serve as mentors for participants and their families to better understand what housing looks like for someone with a disability who is already doing it. Assistive Technology and Remote Supports are amazing resources. We've come a long way in technological advances that support folks living on their own who may need a bit of help.

### Addressing Fears & Concerns

- Fears especially regarding staff call-outs and emergencies
- Providers will need to listen to those fears/concerns and address them in the housing plan

### Addressing Fears & Concerns, cont.

- Consider hiring self-advocates who have successfully transitioned to a private home as peer mentors to lessen participant and families' fears.
- Consider engaging families of self-advocates who have successfully transitioned to self-directed housing
- Assistive Technology (AT) and remote supports are also important resources to address fears/concerns of self-advocates and families
  - Remote Supports require Informed Consent
  - <https://smarthomesmadesimple.org/privacy-and-security/why-informed-consent-matters-when-using-remote-supports/>

[Slide 7]

The facilitator states:

As part of the service definition, each person receiving the HTTS service must have a housing assessment and plan. Values Into Action partnered with Diana T. Myers and Associates in the Person Directed Housing project funded by the Pennsylvania Developmental Disabilities Council to create the Finally Home Housing Toolkit User Guide. This guide provides Housing Options training, as well as sample Assessment and Housing Plan templates. It can be accessed by following the link on the slide.

### Finally Home Housing Toolkit User Guide

Created by Values Into Action and Diana T. Myers, Associates in the Person Directed Housing project funded by the Pennsylvania Developmental Disabilities Council

- Housing Options 1 & 2 Trainings
- HTTS User Guide
- Housing Assessment
- Individualized Housing Plan
- Appendix

<https://valuesintoaction.org/pa/housing-toolkit/>

[Slide 8-10]

The facilitator reads the slides and then states:

So, how do we do an assessment? The assessment should identify a person's current skills, resources, and supports, preferences and identify gaps that may become barriers to obtaining or maintaining housing.

### The Housing Assessment

From the Service Definition...

"Conducting a tenant screening and housing assessment that identifies the participant's preferences and barriers related to successful tenancy. The assessment may include collecting information on potential housing transition barriers, and identification of housing retention barriers."

### The Housing Assessment, cont.

- Is completed with the person
- Participant's existing skills, resources, and supports
- Existing natural supports
- Participant's preference

### The Housing Assessment – cont.

- Income and financial resources
- Past rental history
- Criminal history
- Credit history
- Finances

[Slide 11]

The facilitator states:

As part of the assessment process, it's important to think about where the person wants to live.

The facilitator reads the slide.

### Location Considerations

- Location preference of the person- urban, suburb, rural
- Pool of Support Service Professional (SSPs), Direct Support Professionals (DSPs), and other direct service workers
- Public transportation for participant and for potential staff
- Family & other natural supports
- Employment and volunteer opportunities
- Food markets and other retail stores
- House of Worship attended by participant
- Community activities of interest to participant

[Slide 12]

The facilitator states:

Some additional considerations could be (read slide):

### Other Considerations

- Physical and sensory accessibility needs
- Communication needs
- Assistive Technology (AT) needs
- Remote supports needs
- Medical supports
- Behavioral supports

12

[Slide 13]

The facilitator states:

One way to obtain as much information as possible and to support the person is to review the Individual Support Plan (ISP). Pay attention to the Important To, What Makes Sense, and Health & Safety sections, as well as the rest of the document. The ISP should also include any personal safety concerns. The information can be used as conversation starters when you meet with the participant.

### Using the Individual Support Plan (ISP)

- A person's ISP can be used to prompt conversation with the participant during the assessment
  - "Important to Individual" under Individual Preferences in participant's ISP
  - "What makes sense" and "Health and Safety" in participant's ISP
  - Identify personal safety concerns including fire safety and wandering

13

[Slide 14]

The facilitator states:

For the next 20 minutes, we're going to break out into groups. Each group will be given a scenario and the Housing Assessment from the Toolkit. In your groups, review the scenario, and complete the assessment as best you can. Please come back prepared to have someone speak for your group.

Logistics: The facilitator distributes the scenario and copy of the assessment template to the participants via the Chat. Participants are sent to breakout rooms with a timer set for 20 minutes. Best practice: If your virtual platform includes this feature, remember to send time reminder messages to the break-out rooms such as: 10 minutes left in exercise, 5 minutes left in exercise, etc. Also, if there is more than one facilitator, you could join the breakout rooms to witness the discussions and provide support as needed.

To access the Assessment, follow this link to the Housing Toolkit User Guide webpage <https://valuesintoaction.org/pa/housing-toolkit/>

Below is a sample scenario or you can create your own:

You have agreed to support a young man, James, with Housing Transition and Tenancy Sustaining (HTTS) services. You first met James several weeks ago. At this meeting you will begin to provide his HTTS services.

James has lived in his current apartment for about a year. James is very easily influenced by his friends who hang out in his apartment and puts the needs of his friends before his own. Due to the noise levels from loud music and yelling, James' landlord has received numerous complaints from his neighbors. James has received an eviction notice due to his numerous lease violations.

This is the 6<sup>th</sup> place James has lived since he turned 21 and was asked to leave his grandmother's home. James was evicted from each of the previous 5 places he lived. He has limited contact with his grandmother, no contact with other family members, and wants to continue living alone.

You have the following information gathered from your initial meeting with James and from speaking with his Supports Coordinator:

James is a 26-year-old man who has a diagnosis of intellectual disability with several ongoing medical concerns. He frequently visits the hospital that is within walking distance of his apartment building. James is living alone in a subsidized housing community in Harrisburg, PA (Dauphin County). He is currently unemployed but says he wants to work and has been referred to the Office of Vocational Rehabilitation (OVR). James manages his own money and receives \$914/mo. from Social Security Income (SSI). His Supports Coordinator is concerned that James is being financially exploited by his friends, but he has not confirmed her suspicions.

James is paying \$335/mo. for rent which includes heat, cable, and water. James pays for his electric and phone services. James pays his bills on

time, but he and his Supports Coordinator have discussed employing a representative payee to manage his money due to his friends suspected financial exploitation. James keeps his apartment clean and orderly except when his friends visit.

James likes living in the city of Harrisburg. He walks, bikes, or uses the bus to get around in his community. James is a social guy and enjoys helping his neighbors. He enjoys playing basketball and will hang out at the local playground waiting for opportunities for pickup basketball games. James regularly attends a church that he can walk to. He is an active member of his church family and volunteers for events such as monthly dinners and delivering meals to those in need. James also LOVES dogs and wishes to have a dog at some point.

James is authorized to receive 30 hours of the In-home Community Supports (IHCS) service a week. But he frequently refuses to use the service. It is unclear what goals are identified to support the need for the IHCS hours. James states that he has had no input in hiring team members to work with him and says that he does not like who shows up to help him.

***How would you start the assessment process?***

***What are your initial thoughts about James's immediate needs?***

When the participants return to the main room, discuss what happened in their breakout session. Conversation starters can include:

- How would you start the assessment process?
- What are your initial thoughts about the participant's immediate needs?
- Pull up the assessment and refer to the appropriate sections throughout the conversation.



### **Group Activity #1**

#### **Developing the Assessment**

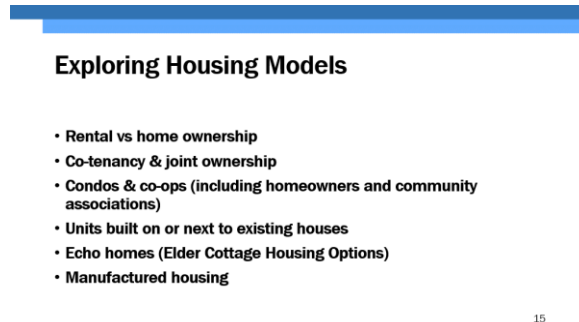
14

[Slide 15]

The facilitator states:

It is important to make sure the person receiving support understands the many housing models available to them.

The facilitator reads the slide.



**Exploring Housing Models**

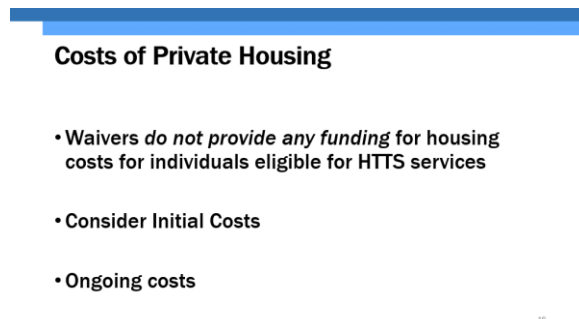
- Rental vs home ownership
- Co-tenancy & joint ownership
- Condos & co-ops (including homeowners and community associations)
- Units built on or next to existing houses
- Echo homes (Elder Cottage Housing Options)
- Manufactured housing

15

[Slide 16]

The facilitator reads the slide and then states:

Although we will always work to encourage preference, cost is a huge factor in the housing options available. The waivers do not provide any funding for housing.



**Costs of Private Housing**

- Waivers *do not provide any funding* for housing costs for individuals eligible for HTTS services
- Consider Initial Costs
- Ongoing costs

16

[Slides 17- 18]

The facilitator reads the slides and then states:

The housing plan must be individualized. This means the participant must be able to use it. That it must reflect that participants progress and goals, and steps to reach those goals. It must be driven by the participant and include the goals they wish to pursue. It's important to conduct the planning with the person's circle of support (that they identify). This plan will not remain stagnant and will continue to update and change as the participant works on each goal and step. This housing plan is also an agreement between the Provider and the Participant about what the service will be focused on.

## The Housing Plan

### From the Service Definition...

"Developing an individualized *Housing Support Plan* based upon the housing assessment that addresses identified barriers, includes short and long-term measurable goals for each issue, establishes the participant's approach to meeting the goal, and identifies when other providers or services, both reimbursed and not reimbursed by Medicaid, may be required to meet the goal".

17

## The Housing Plan, cont.

- Individualized
- Driven by the Participant
- Circle of Support identified by Participant
- Dynamic
- An Agreement between the Provider and the Participant

18

[Slide 19]

The facilitator reads the slide and then states:

It's important to pace with the participant, not with a specific timeline or required deadlines. This could mean it will take longer or shorter than expected for the person to obtain housing or reach housing plan goals/steps.

## Timing and Flexibility

- Participants will move through the process at different paces
- Timelines will need to be adjusted to meet the person's realities and preferences
- Revisited as a participant's circumstances change

19

[Slide 20]

The facilitator states:

The housing plan will identify barriers faced by the participant and develop steps to overcome those barriers. These steps can include skill building, increasing supports, adding services, or increasing resources. Home accessibility features, modifications and smart home tech can also help fill in gaps/overcome barriers. You will see, as we go through the assessment and plan, that we continue the process of assessing skills, supports/services and resources, and this framework will continue as the person works through their housing plan.



## Identifying Barriers

Work with the person to identify barriers to be addressed in the housing plan

- Include skill building, increasing support, or increasing resources
- Consider home accessibility features, modifications, and technology
- Assess skills, supports and resources—Use that as the framework
  - Assessing Skills
  - Assessing Supports
  - Assessing Resources

20

[Slide 21]

The facilitator states:

Sometimes when a person moves, that means they will be leaving the home of natural supports. When that happens, we need to support the participant in identifying the change, quantifying the impact, and reporting that information to the Supports Coordinator.

## Determining Additional Support Needs

- Work with participant, their team and supports coordinator to develop a projection of supports and additional services that will be needed if the participant moves into their private home
- Quantify natural supports that may be lost or reduced upon move
- Determine changes needed to current supports and how they might be provided

21

[Slide 22]

The facilitator states:

For the next 20 minutes, we're going to break out into groups. Using the same scenario that we used to develop the assessment, we will now begin developing the Housing Plan. Refer to the scenario and the assessment as you work through the Housing Plan. Please come back prepared to have someone speak for your group.

Logistics: The facilitator distributes a link to the Housing Plan template to the participants via the Chat. Participants are sent to breakout rooms with a timer set for 20 minutes. Reminder - Best practice: If your virtual platform includes this feature, remember to send time reminder messages to the break-out rooms such as: 10 minutes left in exercise, 5 minutes left in exercise, etc. Also, if there is more than one facilitator, you could join the breakout rooms to witness the discussions and provide support as needed.

When the participants return to the main room, debrief the process. Pull up the Housing Plan and refer to the appropriate sections throughout the conversation.

## Group Activity #2

### Developing the Housing Plan

22

[Slides 23 & 24]

The facilitator states:

Planning resources are important, but don't get stuck on just one format. Each person has a different way of visualizing goals, and steps to get there. Here are some planning resources that may be helpful to you and the people you support. Make sure to spend time reviewing these resources. You may also seek out ongoing training opportunities to keep your skills about the resources up to date as things are always changing in the system. And there are always new best practices being discovered. New housing resources are always being introduced within the system. Keep educating yourself!

#### Planning Resources

- Finally Home Housing Toolkit User Guide
  - <https://valuesintoaction.org/pa/housingtoolkit/>
- Life Course Tools:
  - <https://www.myodp.org/course/view.php?id=1173>
  - <https://www.lifecoursetools.com/>
- PATH & MAPS:
  - <https://inclusion.com/path-maps-and-person-centered-planning/>
  - <https://inclusive-solutions.com/person-centred-planning/maps/>
  - [https://ohioemploymentfirst.org/up\\_doc/What\\_is\\_PATH\\_Strategic\\_Planning.pdf](https://ohioemploymentfirst.org/up_doc/What_is_PATH_Strategic_Planning.pdf)
  - <https://www.youtube.com/playlist?list=PLQ9lgZXp0IK2YMy5uF77x-cSgfl-Abby0>

23

#### Planning Resources, cont.

- Pennsylvania Assistive Technology Foundation (PATF)
  - A Home of My Own- Preparing for Independence
    - <https://www.studymoney.us/activity/activity-16-preparing-for-independence/>
  - Cents & Sensibility: A Guide to Money Management
    - <https://patf.us/cents-and-sensibility-a-guide-to-money-management-508-compliant-pdf/> (in particular Chapter 7)
- Housing and Services Resource Center of US Health and Human Services (HHS) & Housing and Urban Development (HUD)
  - <https://acl.gov/HousingAndServices>

24

[Slide 25]

The facilitator reads the slide and then states:

The housing crisis plan is just a way to prevent a housing disaster or respond to one. The housing crisis plan should focus on things that put housing in jeopardy. But be aware, this discussion may lead to some emergency planning discussions, which are also great to have.

## Crisis Planning

### What the Waiver Says...

- Developing a housing support crisis plan with the individual that includes prevention and early intervention services when housing is jeopardized to assist individuals with planning, locating and maintaining a home of their own.

### What we need to know...

- What is a crisis?
- Prevention Strategies
- How I know Housing is Jeopardized?
- Knowing when it's time to move

25

[Slide 26]

The facilitator reviews the key takeaways and provides an opportunity for the group to ask questions.

## Key Take Aways

- HTTS Support is for people who want housing separate from their services.
- Housing Assessments identify resources, skills, and supports (or lack thereof) and participant preferences.
- Housing Plans are individualized to the person and may be very different from one person to another.
- Crisis Planning is a way to identify possible issues that will impact housing and develop ways to overcome these problems.

26

[Slide 27]

His slide acknowledges the project partners, funding source, and the copyright.

## Acknowledgement

This training was developed by the PA Health Law Project, Values Into Action, PA Assistive Technology Foundation and Regional Housing Legal Services with grant funding from the Pennsylvania Developmental Disabilities Council. It is the culmination of five plus years of collaborative work.

The Pennsylvania Developmental Disabilities Council is supported by the Administration for Community Living (ACL), U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$3,095,416.00 with 100 percent funding by ACL/HHS. Council efforts are those of the grantee and do not necessarily represent the official views of, nor an endorsement, by ACL/HHS, or the U.S. Government.

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# Module 5

TITLE: HTTS Provider Role

Time: 50 minutes



Values  
into action



Housing Transition & Tenancy Sustaining Service  
HTTS Provider Role

1

[Slide 2]

The facilitator states:

The service definition for HTTS outlines several actions the HTTS Provider can do to support a participant.

The facilitator reads the slide.

## HTTS Provider Role...

- Identify the programs for which the individual might qualify & their availability
- Assist with Application processes and documents necessary to apply-for subsidy & an apartment
- Identify resources needed to obtain documents needed
- Build relationship with local housing authorities and Regional Housing Coordinators
- Make referrals to Section 811 Local Referral Network or become stakeholder referral agency
  - Allows you to make referrals for subsidized housing through the 811 Project Rental Assistance program

2

[Slide 3]

The facilitator reads slide and then states:

Financial education and planning are the biggest roles of the HTTS Provider. Although it may sound clear cut, it is often difficult to initially explain affordability and how that impacts preference/choice in housing. For instance, a person may want a house on the beach somewhere warm year-round. However, their budget says that's not realistic, yet. However, there are things they can do to increase their income, such as obtain employment, or increase their circle of support to include others who have the same desire, etc.

## Financial Education & Planning

### What the waiver says...

- Assisting the participant with obtaining and identifying resources to assist the participant with financial education and planning for housing. Activities include assistance with budgeting for house and living expenses. Assistance with completing applications for subsidies or other entitlements such as energy assistance, or public assistance. Assistance with identifying financial resources to assist with housing for the participant including special needs trusts and ABLE accounts.

### What we need to know...

- What is affordable
- Role of Financial Decision Makers
- Financial Education Resources
- Credit
- Public Assistance
- Financial Resources

[Slide 4]

The facilitator states:

It's important to assist participants to determine and understand their financial situation and that they will need to prioritize expenses. The resources provided on this slide can be helpful.

## Financial Education Resources

- Important to assist participant to determine and understand their financial reality for housing purposes and to prioritize expenses
  - Work sheets: Money Mapping portion of financial education curriculum- PATF's <https://www.studymoney.us/> & Cents and Sensibility, <https://patf.us/what-we-do/financial-education/> and PREP materials

[Slide 5]

The facilitator reads the slide.

## Resource Identification: Ongoing Expenses

### What the Waiver Says...

Assisting the participant with identifying resources to secure household furnishings and utility assistance. Activities will include identifying and coordinating resources that may assist with obtaining a security deposit, first month rent, or any other costs associated with the transition. Financial support that constitutes a room and board expense is excluded from federal financial participation in the waiver.

### What we need to know....

- How to identify and coordinate resources
- Household Furnishing Resources
- Utility Assistance Resources
- Resources for Security Deposits, first month rent
- Resources for other Transition Costs

[Slide 6-9]

The facilitator states:

The next few slides list several financial resources and ways a participant can save money without impacting their benefit eligibility.

Activity: Before we get started, I'm going to ask each of you to take a few minutes to look up one of the resources. When we come back together, we'll share what we learned with the group.

The facilitator assigns each participant a resource from slides 6-9 and sets timer for 5 minutes.

When the group returns, ask for volunteers to share what they learned or call on participants individually. Then review the slides.

The facilitator reads the slides.

### Other Financial Resources

- Contributions from family
  - ✓ May affect SSI payment rate and eligibility for waiver and Medical Assistance.
  - ✓ May not be a reliable long-term source of funding for housing costs
- Supplemental Nutrition Assistance Program (SNAP)
- Low-Income Home Energy Assistance Program (LIHEAP)

### PA ABLE Accounts

- Great flexibility & low administrative fees
- Funds can be used for wide variety of purposes including some ongoing expenses like rent/mortgage, utilities, repairs, taxes
- Contributions currently capped at \$17,000 a year, higher if the account owner contributes money earned from a job
- Participant must have a disability that occurred before age 26

<https://PaABLE.gov/>  
<https://patf.us/pdf-download-investing-for-my-future-a-supplement-to-cents-and-sensibility-a-guide-to-money-management-508-compliant/>

## Special Needs Trusts

- Cannot be used for ongoing living expenses like rent
  - Exception: 1 time housing related expenses like mortgage down payments or home repairs
- No cap on amount that can be put into trust
- File federal and state taxes based on the growth of the earnings; administrative fees are usually higher for a Trust than are charged for an ABLE account.
- Should be set up by an attorney

<https://www.specialneedsalliance.org/>  
<https://www.achieva.info/family-trust/special-needs-trusts-101>

## Pooled Trusts

### Non-profit Pooled trusts

- Achieva Family Trust
  - <http://achievafamilytrust.org/>
- Ardent Community Trust of PA (formerly ARC Community Trust)
  - <https://actpa.org/>

### Comparison of ABLE accounts & Special Needs Trusts- PATF's summary

<https://patf.us/who-we-are/publications/able-vs-snt/>  
<https://www.studymoney.us/activity/ways-to-save-money-and-not-lose-benefits/>  
[https://patf.us/wp-content/uploads/2023/03/Chart\\_Comparison-of-ABLE-Accounts-and-Special-Needs-Trusts\\_2023\\_508.pdf](https://patf.us/wp-content/uploads/2023/03/Chart_Comparison-of-ABLE-Accounts-and-Special-Needs-Trusts_2023_508.pdf)

[Slide 10 & 11]

The facilitator states:

Credit is required to obtain an apartment or home in a person's own name.

The facilitator reads the slides.

## Understanding Credit

- Good credit is critical to obtain most private apartments and mortgages
- The need to create a credit history.
- The need to take action to improve their credit
  - Resource: PATF Cents and Sensibility: A Guide to Money Management, 7th edition, Chapter 6 (Borrowing Money) downloadable pdf <https://patf.us/what-we-do/financial-education/>
  - <https://www.studymoney.us/activity/credit-overview/>
  - Interactive worksheets on the StudyMoney.us website- include auto- calculations

10

## Understanding Credit – cont.

- Non-payment or late payment of bills, especially rent and utilities, can damage credit and may even result in eviction, refusal to renew lease, termination of utilities or being sent to collection
- Consider co-signers and options for renting from people familiar with the participant while credit is being built or repaired

### Resources:

- <https://patf.us/what-we-do/financial-education/>
- <https://www.studymoney.us/activity/credit-overview/>

11

[Slide 12]

The facilitator states:

Technology has come a long way, and the pandemic really helped us in the ID service field to find unique solutions to accessibility and support issues. Assistive technology can include anything from a shower chair to a smart home. PATF's Guide to Funding Assistive Technology also includes an assessment to show how assistive technology can be used to provide support. Additionally, Remote Supports are now available and covered as a waiver-funded service.

## Assistive Technology & Remote Supports

- PATF's Guide to Funding Assistive Technology  
<https://patf.us/funding-your-assistive-technology-pdf>  
Hard copies (English & Spanish) can be downloaded
- Remote supports
  - two-way, real-time communication in the individual's home or community which allows an employee or contractor who is offsite to monitor and respond to the individual's needs.
  - Covered under waivers as an alternative to direct staffing

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[Slide 13 & 14]

The facilitator reads slides and then states:

To utilize smart home and assistive tech, you will probably need internet access. Unfortunately, there are still communities where there are barriers to reliable internet access. Although waiver funds do not cover internet access, there are programs that can. Use the links on the slide to learn more.

### "Smart Home" Technology

Smart home technology includes generic, mainstream devices that are found in our local stores. These devices can help people with disabilities turn on and off lights, control the temperature, see who's at the door and unlock or lock the door, open and close blinds, and much more.

<https://SmartHomesMadeSimple.org>

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### Internet Access

- Some AT and Smart home technologies use internet connections to function.
- Self-advocates often depend on the internet to communicate with friends and for telehealth and other virtual services.
- Per CMS rules, waivers cannot cover the cost of internet connections.
- Affordable Connectivity Program- provides \$30 a month discount towards internet service for anyone on a waiver or Medicaid  
<https://www.fcc.gov/affordable-connectivity-program-consumer-faq>  
<https://docs.fcc.gov/public/attachments/DA-23-366A1.pdf>

14

[Slide 15]

The facilitator reads the slide.

## Searching for a Home

### What the Waiver Says...

"Assisting the participant with the process of searching for a home that is located in an integrated setting that is dispersed in the community in a noncontiguous location not located on a campus setting. Housing Transition cannot be used to find homes that are located in any development or building where more than 25% of the apartments, condominiums, or townhouses have ODP waiver funded participants residing."

### What we need to know...

- Factors to consider
- Tools and Resources for Housing Search

15

[Slides 16]



The facilitator states:

According to the United States Department of Housing and Urban Development, a person's home is affordable if no more than 30% of their income covers their housing costs (including utilities). Anything over 30% is considered rent burdened and not affordable. There are resources regarding determining affordability in the links on the slide. Please remember that the waiver does not pay for housing for individuals receiving HTTS Support.

### Assessing Affordability

- Assist participant to determine and understand their financial situation in relation to the fair market rent.
- 30% Rule
  - "Don't spend more than 30% of your gross monthly income on housing."
  - Senator Edward Brooke & The Brooke Amendment (coauthor of the Fair Housing Act with Senator Walter Mondale in 1968)
  - [https://www.huduser.gov/portal/pdredge/pdr\\_edge\\_featd\\_article\\_092214.html#--text=The%2030-percent%20rule%20for%20measuring%20affordability%20can%20be%20se-nator%20and%20a%20vocal%20advocate%20of%20affordable%20hou-sing](https://www.huduser.gov/portal/pdredge/pdr_edge_featd_article_092214.html#--text=The%2030-percent%20rule%20for%20measuring%20affordability%20can%20be%20se-nator%20and%20a%20vocal%20advocate%20of%20affordable%20hou-sing).
- Fair Market Rent
  - [https://www.huduser.gov/portal/datasets/fmr/fmrs/FY2022\\_code/select\\_Geograp-hy.odn](https://www.huduser.gov/portal/datasets/fmr/fmrs/FY2022_code/select_Geograp-hy.odn)
- Waivers do not provide funding for housing costs for individuals eligible for HTTS services

[Slide 17 & 18]

The facilitator states:

We are going to review in the next few slides some ways to make the fair market rent that seems unaffordable, affordable.

The facilitator reads the slide.

### Subsidized Housing

Subsidized housing ensures long term affordability. However, there are long waiting lists and available units may not be in locations that meet the participant's needs. Types of subsidized housing include:

- Apartments in buildings operated by local Public Housing Authority ("PHA")
- Housing vouchers that belong to the participant which subsidize rents in private apartments if landlord accepts the voucher
- Subsidized apartments in buildings that received certain federal or state funding

### Subsidized Units

- Apartment buildings for seniors and people with disabilities
  - ✓ operated by religious organizations or other non-profits
  - ✓ usually HUD Section 202 projects
- Subsidized units in building funded with Low Income Housing Tax Credit (LIHTC)
  - ✓ Guide to renting a LIHTC Home  
<https://www.rhls.org/2022/03/renting-a-lihtc-home-everything-you-need-to-know/>

**Additional Resources**  
<https://www.pahousingsearch.com/> to search for those units.  
<https://affordablehousingonline.com/guide>

[Slide 19]

The facilitator states:

PA Housing Search is a great resource to find both fair market rent housing and subsidized housing.

The facilitator reads the slide.

### PAHousing Search.com

- Building networks with private landlords
- Working with real estate agents and property managers
- Knowing your local Housing Authorities
- Regional differences

<https://www.pahousingsearch.com/>

19

[Slide 20 & 21]

The facilitator reads the slides.

### Housing Choice Vouchers (“Section 8”)

- Application is made at the local Public Housing Authority (PHA).  
<https://www.hud.gov/states/pennsylvania/renting/havebsites>
- Applicants will need to supply documents to verify their identity, citizenship/immigration status and income.
  - Providers should assist applicants in obtaining required documents.
- Most PHAs have long waiting lists for housing choice vouchers and may not even be taking applications  
<https://affordablehousingonline.com/public-housing-waiting-lists/Pennsylvania>

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### Housing Choice Vouchers, cont.

- Tenant pays 30% of their income towards the rent while the PHA pays the rest- up to a maximum set by HUD on a regional basis.
- Landlord cannot charge more than the maximum rent set by HUD.
  - ✓ People who obtain a voucher must find a private landlord who will accept a rental amount that does not exceed the HUD-set maximum. Given the rise in rents, this has become increasingly difficult.

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[Slide 22]

The facilitator reads the slide.

### Section 811 Project Rental Assistance Program

- For people with disabilities who meet low-income guidelines
- 811 information resource  
<https://www.phfa.org/mhp/section811pra/>
- Provider agencies can become “Stakeholders” to take applications - Contact [samantha.vollrath@inglis.org](mailto:samantha.vollrath@inglis.org).
- Applications can also be made through “Local Lead Agencies”  
[https://www.phfa.org/forms/local\\_lead\\_agencies/dhs-local-lead-agencies.pdf](https://www.phfa.org/forms/local_lead_agencies/dhs-local-lead-agencies.pdf)

22

[Slide 23]

The facilitator reads the slide.

## Homeownership

- Homeownership can provide greater housing stability than rentals
- Owning a house or condo will not affect a person's eligibility for waiver services or other benefits, so long as it is the person's primary residence
- Providers can explain pros & cons of homeownership and help identify needed resources but should not advise on the legalities of sales agreements or mortgages

[A Guide to Homeownership Programs for People With Disabilities | MoneyGeek.com](#)

23

[Slides 24 & 26]

The facilitator states:

There is even funding available for home ownership that makes it more affordable.

The facilitator reads the slides.

## Funding for Homeownership

Pennsylvania Housing Finance Agency (PHFA) Mortgages

- Offers many mortgages that have lower down payment requirements, lower costs and competitive interest rates.  
<https://www.phfa.org/homebuyers/>
- Access Home Modification Program- not less than \$1,000 and no more than \$10,000
  - <https://www.phfa.org/programs/assistance/accesshomemod.aspx>
- Home buyers may also be eligible for a no interest loan of up to \$15,000 for downpayment and closing costs  
<https://phfa.org/programs/assistance.aspx>

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## Funding for Homeownership, cont.

FHA insured mortgage

- With good credit and some money for a down payment, you may qualify for an FHA-insured mortgage
- Lower down payment than most conventional mortgages.
- Finance your closing costs and fees into the mortgage  
<https://www.hud.gov/buying/loans>

HUD's 203(k) program:

- Finance the purchase and repairs on the home.  
[https://www.hud.gov/program\\_offices/housing/sfh/203k/203k-df](https://www.hud.gov/program_offices/housing/sfh/203k/203k-df)

25

## Funding for Homeownership, cont.

US Department of Agriculture (USDA) offers homeownership assistance programs for residents of non-urban areas.

- Property Eligibility  
<https://eligibility.sc.egov.usda.gov/eligibility/welcomeAction.do?pageAction=sfpd>
- Applicant Eligibility  
<https://eligibility.sc.egov.usda.gov/eligibility/welcomeAction.do>

Veterans Administration

- No down payment and has lower closing costs for Veterans and their family members.  
<https://www.va.gov/housing-assistance/#-text=VA%20housing%20assistance%20can%20help%20benefits%20you've%20earned>

26

[Slide 27]

The facilitator states:

Housing Choice Vouchers can also be used in home purchases, but this program has specific rules and is not available in all areas.

The facilitator reads the slide.

### HUD Homeownership Voucher Program

- HUD offers a homeownership program for holders of Housing Choice Vouchers
- This program is not available in all areas. Check with your local housing authority to see if they offer this program.  
[https://www.hud.gov/program\\_offices/public\\_indian\\_housing/programs/hcv/homeownership](https://www.hud.gov/program_offices/public_indian_housing/programs/hcv/homeownership)
- Information about the Philadelphia Housing Authority's Housing Choice Voucher Homeownership Program can be found at  
<http://www.pha.phila.gov/resident-services/homeownership/housing-choice-homeownership.aspx>

27

[Slides 28 & 29]

The facilitator states:

Housemates, sometimes referred to as roommates, are a very personal choice for people. These slides list things that should be considered and ways the HTTS provider can assist the participant.

The facilitator reads the slides.

#### Considering a Housemate

- Personal Choice
- Identifying preferred characteristics
- Shared interests
- Characteristics that may present challenges for potential housemates

28

#### Considering a Housemate, cont.

- Identifying resources for finding potential room/housemates
- Assist with locating, interviewing and selecting potential housemates
- Communicating with your room/housemate
- Consider developing written/share agreements for changing or ending relationship

29

[Slide 30]

The facilitator reads the slide and then states:

Again, sharing a home with someone or others is a very personal choice.

## Shared Housing

- Personal choice- Provider cannot insist participant seek a housemate but some participants may not want to live alone
- For some participants, sharing housing with another may be financially necessary in order to obtain the type of housing in the location sought by the participant
- Obtaining preferred characteristics of room/housemate from supported individual (one page profile and/or matching tool or in assessment)
- Consider shared interests, availability, characteristics and financial ability before disability

30

[Slide 31]

The facilitator states:

This slide provides additional resources specific to reasonable accommodations and reasonable modifications.

The facilitator reads the slide.

## Reasonable Accommodations

- **Reasonable Accommodations**  
<https://www.equalhousing.org/fair-housing-topics/reasonable-accommodations-for-people-with-disabilities/>  
[Reasonable Accommodation Housing - Fair Housing Rights For Individuals With Disabilities - Fair Housing \(fhlaw.org\)](#)
- **Reasonable Modifications**
  - Landlord must allow if "reasonable" but usually at tenant's expense  
<https://www.equalhousing.org/fair-housing-topics/reasonable-modifications-for-people-with-disabilities/>

31

[Slide 32]

The facilitator reviews the key takeaways and provides an opportunity for the group to ask questions.

## Key Take Aways

- Affordability means only 30% of a person's income is needed for their housing costs (including utilities)
- There are many ways to save money, including PA Able accounts, Pooled Trusts, Special Needs Trusts, etc.
- Technology can provide many solutions to overcoming housing barriers.
- Shared housing and roommates are a personal choice that should not be taken lightly.

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[Slide 33]

This slide acknowledges the project partners, funding source, and the copyright.

## Acknowledgement

This training was developed by the PA Health Law Project, Values Into Action, PA Assistive Technology Foundation and Regional Housing Legal Services with grant funding from the Pennsylvania Developmental Disabilities Council. It is the culmination of five plus years of collaborative work.

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# Module 6

TITLE: Addressing Barriers

Time: 30 minutes



Housing Transition & Tenancy Sustaining Service  
Addressing Barriers

1

[Slides 2-4]

The facilitator states:

As previously discussed, this module will provide resource links and suggestions about how to address common barriers that may come up when providing HTTS services. Being part of the community and living as independently as possible are among the most important values and goals shared by people with disabilities, their families, and advocates. A home of one's own – either rented or owned – is the cornerstone of independence for all people. However, across the U.S. people, including people with intellectual and developmental disabilities, face a severe housing crisis.

- a. For people with disabilities, there are far too many barriers to housing. Without affordable, accessible housing in the community, many are at risk of institutionalization or homelessness.
- b. Across the nation, many people with disabilities are experiencing an affordability crisis. Approximately 4.8 million non-institutionalized people with disabilities who rely on federal monthly Supplemental Security Income (SSI) have incomes averaging only about \$9,156 per year – low enough to be priced out of every rental housing market in the nation.
- c. Many people with intellectual and/or developmental disabilities (IDD) live with aging caregivers (age 60 and older). As this generation of caregivers continues to age, many of their adult children with IDD may be at risk of institutionalization or homelessness.
- d. An accessible home offers specific features or technologies such as lowered kitchen counters and sinks, widened doorways, and wheel-in showers. For people who use mobility devices, finding housing with even basic accessibility

features (e.g., an entrance with no steps) can be daunting, if not entirely impossible or unaffordable.

- e. The availability of affordable, accessible housing remains far less than the need, leaving far too many people with IDD institutionalized, homeless, or in “worst case” housing (paying too much in rent to afford other basics or living in severely inadequate conditions).
- f. The Fair Housing Act prohibits housing discrimination on the basis of race, color, religion, sex, disability, familial status, and national origin. Complaints by people with disabilities often make up the majority of discrimination complaints received by HUD’s Fair Housing Enforcement Office and other fair housing agencies.

Now let’s talk about some resources that can help address some of these barriers.

The first barrier is home accessibility so let’s start with exploring resources for Home Modifications.

The facilitator reads the slides.

### Resources for Home Modifications

- Waivers: “Home Accessibility Adaptations” service
  - \$20,000 for a 10-year period or when participant moves into another private home
  - 3 bids usually required
  - Refer to the person’s Supports Coordinator for information and assistance
- PA Accessible Housing Program
  - Funded by Pa Department of Community and Economic Development and administered by Self Determination Housing PA and some local Housing/Redevelopment Authorities

<https://www.inglis.org/programs-and-services/inglis-community-services/home-modification-program>

### Resources for Home Modifications, cont.

- Office of Vocational Rehabilitation (OVR) can be a resource for home modifications if part of an employment plan
- PHFA provides loans for home modifications for home buyers with disabilities who get their mortgage through PHFA. These loans do not have to be repaid until the home is sold or remortgaged.
- PHFA also provides a Resource list for Home repairs, Modifications and Assistive Technology
  - <https://www.phfa.org/programs/ppd.aspx>
- USDA provides 1% interest loans for home repairs which can include accessibility modifications in areas of PA designated rural.
- <https://www.rd.usda.gov/programs-services/single-family-housing-programs/single-family-housing-repair-loans-grant/pa>

### Resources for Home Modifications, cont.

- PA Assistive Technology Foundation provides low interest loans for AT, home modifications and purchase of vans to be modified <https://patf.us/>.
- Private funding sources - see PATF’s “Funding Your Assistive Technology” guide for a list: <https://patf.us/who-we-are/publications/funding-your-assistive-technology/>
- Habitat for Humanity provides some home mods for older adults <https://www.habitat.org/our-work/aging-in-place>
- Achieva Trust – Pooled trust [www.achieva.info](http://www.achieva.info)

[Slides 5 & 6]

The facilitator states:

There are local resources available including making contacts with your:

The facilitator reads the slides.



## Local Resources

- Public Housing Authorities
- Redevelopment Authorities
- Private landlords and property management companies
- Local Housing Options Teams (LHOTs)
- County Area Agencies on Aging

## Local Resources

- Local Homeless Assistance Program Agencies
  - <https://www.dhs.pa.gov/Services/Other-Services/Pages/Homeless-Assistance.aspx>
- Religious and charitable organizations
- Local agencies that administer the PA Home Accessibility Program
- Local banks and mortgage companies
- Local real estate agents

[Slide 7]

The facilitator states:

There are times when we may be supporting a person who has a documented criminal history. This can be a barrier especially when many landlords require criminal background checks as part of the application process. This slide provides a resource and suggestions for navigating through this challenge.

The facilitator reads the slide.

## Personal Barriers to Housing

### Having a Criminal history

- Clean slate law, expungement & Petition to Seal
  - Free legal services, but varies by county
  - RHLS – Regional Housing Legal Services
    - <https://www.rhls.org/>
- Landlords can consider age and nature of conviction
- Contact your local Fair Housing Center for more information

[Slide 8]

The facilitator states:

Remember that it is illegal to discriminate in the sale or rental of housing, including against individuals seeking a mortgage or housing assistance, or in other housing-related activities. The Fair Housing Act prohibits this discrimination because of race, color, national origin, religion, sex, familial status, and disability. If you feel you have been the victim of illegal housing and commercial property discrimination, you should file a complaint or report a bias incident by contacting the PA Human Relations Commission.

The facilitator reads the slide.

## Understanding Fair Housing Rights

- PA Human Relations Commission
  - [https://www.phrc.pa.gov/Complaints/Pages/Housing\\_andCommercial\\_Property.aspx](https://www.phrc.pa.gov/Complaints/Pages/Housing_andCommercial_Property.aspx)
- Reasonable Accommodations
  - [https://www.equalhousing.org/fair\\_housing-topics/reasonable-accommodations\\_for-people-with-disabilities/](https://www.equalhousing.org/fair_housing-topics/reasonable-accommodations_for-people-with-disabilities/)
- Reasonable Modifications
  - Landlord must allow if "reasonable" but usually at tenant's expense
  - [https://www.equalhousing.org/fair\\_housing-topics/reasonable-modifications\\_for-people-with-disabilities/](https://www.equalhousing.org/fair_housing-topics/reasonable-modifications_for-people-with-disabilities/)
- Assistance animals
  - Landlord cannot deny a person with a disability the right to have an assistance animal as long as the animal's function has a direct connection to the person's disability
  - [https://www.equalhousing.org/fair\\_housing-topics/assistance-animals-for-people-with-disabilities/](https://www.equalhousing.org/fair_housing-topics/assistance-animals-for-people-with-disabilities/)

[Slide 9]

The facilitator states:

The lease or mortgage contract should always include the name of the person you are supporting. However, there may be times when the landlord or mortgage company has concerns. This slide provides resources to assist you with navigating these challenges. And in addition, Chapter 6 of the PREP Training (discussed in a previous module) includes a section on Understand a Lease.

The facilitator reads the slide.

## Who Will Sign Lease or Mortgage?

- Will landlord/mortgage company question legal capacity of participant to sign on their own?
- Does participant lack credit acceptable to landlord/mortgage company so co-signer will be required?

### Resources

- [www.supporteddecisionmaking.org](http://www.supporteddecisionmaking.org)
- <https://www.disabilityrightspa.org/resources/#estate-planning-substitute-decision-making-guardianship>

[Slide 10]

The facilitator states:

There may be landlords who do not understand the renter's capacity to rent. The PREP Training is a first step in helping the renter prepare for being an informed tenant or homeowner. PREP is a train-the-trainer program that prepares individuals to enter the rental process, navigate housing issues, and successfully retain housing that meets their needs. Participants learn how to:

- a. Assess housing needs.

- b. Budget for housing.
- c. Understand common barriers to housing.
- d. Locate housing.
- e. Understand common components to a lease.
- f. Communicate with landlords.
- g. Understand the eviction process.
- h. Create housing folder.

The facilitator reads the slide.

### Resources for Review of Lease or Mortgage Terms

- SDHP's PREP Training and Course book  
<https://www.inglis.org/programs-and-services/inglis-community-services/self-determination-housing-of-pennsylvania-sdhp/sdhp-calendar-for-date-of-next-training>
- Know Your Rights as a Renter  
<https://renters.equalhousing.org/application-lease/things-to-consider-before-renting/>

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[Slide 11 & 12]

The facilitator states:

Another barrier can be lack of preparation prior to moving into one's new home. Think about times that you have prepared for a move.

**Activity** - What things did you need to consider before making your move? Ask for 5 or 6 answers before moving on to slide review.

The facilitator states:

Things to consider when preparing for a move are:

The facilitator reads the slide.

### Preparing for Move-In

- Ensuring accessibility modifications are in place
- Arranging for move of furnishings & belongings
- Obtaining additional furnishings
- Arranging for utilities

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### Preparing for Move In, cont.

- Connecting with housemate (if any) and natural supports to ensure that they are also ready for move-in
- Support the Participant to check with responsible party (service agency, Common Law Employer or Managing Employer) to confirm that staffing at new home is in place

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[Slide 13]

The facilitator reviews the key takeaways and provides an opportunity for the group to ask questions.

### Key Take Aways

- Resources are available to address many barriers
- Knowing about these resources can be a key to overcoming barriers
- Completing the PREP Course and using the course with the individual supported is a great way to address or prevent barriers a person might experience
- Being prepared prior to moving can help reduce barriers that may be encountered when moving
- Educating the person about ways to address barriers builds life skills and independence

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[Slide 14]

This slide acknowledges the project partners, funding source, and the copyright.

### Acknowledgement

This training was developed by the PA Health Law Project, Values Into Action, PA Assistive Technology Foundation and Regional Housing Legal Services with grant funding from the Pennsylvania Developmental Disabilities Council. It is the culmination of five plus years of collaborative work.

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# Module 7

TITLE: Tenancy Sustaining Services

Time: 60 minutes



Housing Transition & Tenancy Sustaining Service  
Tenancy Sustaining Services

1

[Slide 2]

The facilitator states:

The Housing Transition and Tenancy Sustaining service is also available to support individuals to help them maintain their tenancy in a private home owned, rented, or leased by the individual. The availability of ongoing housing-related services in addition to other long-term services and supports promotes housing success, fosters community integration and inclusion, and develops natural support networks.

As an individual's skills and needs evolve, review the Housing Plan and Crisis Plan with the individual and update the plans as needed. When reviewing, consider disputes or issues that may have happened, and the strategies used to resolve the dispute or issue. Also, consider new skills and assets the individual has acquired or restored and how they affect the individual's needs and the Housing Support Plan. You may consider agreeing with the participant to schedule an annual or bi-annual review of the Housing Support Plan to ensure it is up to date and accurate.

## Tenancy Sustaining Service

### What the Waiver Says:

**"This service is also available to support participants to maintain tenancy in a private home owned, rented or leased by the participant. The availability of ongoing housing-related services in addition to other long-term services and supports promotes housing success, fosters community integration and inclusion, and develops natural support networks."**

[Slides 3-7]

The facilitator states:

The next few slides list the tasks included in the Tenancy Sustaining section of the service definition.

The facilitator reads the slides.

### Tenancy Sustaining Service, cont.

- Providing early identification and intervention for behaviors that may jeopardize housing, such as late rental payment and other lease violations.
- Work with the individual to identify behaviors that may put the individual at risk of losing housing.
- Perform skill-building activities to manage and reduce such behaviors, such as late rental payment or other lease violations.
- Provide ongoing support and use of motivational interviewing and linkage to appropriate interventions to ensure successful tenancy. For example, work with the Regional Housing Coordinator/Local Lead Agency (RHC/LLA) to enroll the individual in a housing PREP course or identify other necessary clinical or service interventions.
- Contact the identified person or agency from the crisis plan to assist with necessary interventions.

### Tenancy Sustaining Service, cont.

- Education and training on the role, rights, and responsibilities of the tenant and landlord.
- Provide education and training to the individual to assist him or her in developing or restoring skills to be a good tenant. This education and training includes the review of the rights and responsibilities of both the tenant and the landlord. Education and training may specifically include the review of the lease agreement with the individual to know when to enforce tenant rights and understand the potential consequences for violating the agreement or utility-related obligations.
- Coaching on developing and maintaining key relationships with landlords/property managers with a goal of fostering successful tenancy.
- Work with an individual to develop or restore skills to advocate for him or herself with the landlord or property manager and to develop and maintain positive relationships to foster successful tenancy and community living.
- Model and teach communication skills and role play situations to develop appropriate interpersonal skills. Coach and assist an individual to develop skills to appropriately resolve disputes with landlords and/or neighbors.

### Tenancy Sustaining Service, cont.

- Assistance with activities such as supporting the individual in communicating with the landlord and/or property manager; developing or restoring interpersonal skills in order to develop relationships with landlords, neighbors, and others to avoid eviction or other adverse lease actions; and supporting the individual in understanding the terms of a lease or mortgage agreement.
- When necessary, such as when an individual's skills are still developing or being restored, advocate directly with the landlord on the individual's behalf to address potential lease compliance and other issues related to occupancy, such as complaints from neighbors or late rent payments, to reduce the risk of eviction or other adverse action.
- Advocacy and linkage with community resources to prevent eviction when the housing is, or may, become jeopardized.
- Assist the individual in restoring and/or developing skills related to identifying and connecting to community resources, such as legal aid, food banks, employment assistance, utility assistance, and entitlements, etc.

### Tenancy Sustaining Service, cont.

- Assistance with the housing recertification process.
- Assist an individual to develop the skills to secure necessary documentation for completing a housing recertification, and provide assistance in completing applications, in a timely manner so as not to jeopardize housing.
- Work toward the transfer of skills so the individual learns to complete the application independently.
- Coordinating with the tenant to review, update, and modify their housing support and crisis plan on a regular basis to reflect current needs
- Address existing or recurring housing retention barriers.

### Tenancy Sustaining Service, cont.

- Continuing training in being a good tenant and lease compliance, including ongoing support with activities related to household management.
- Assist in skill development/restoration of natural/community networks of support.
- Ongoing support to the individual including motivational interviewing and behavioral interventions on being a good tenant.
- Skills training with the individual on household management, ADL training, money management, household maintenance, paying bills, etc., as well as the review of potential crisis situations and adherence to the crisis plan.

[Slide 8]

The facilitator states:

We all face challenges, the key to success is how we react when they occur. The best way to minimize challenges is to prepare in advance.

- a. Develop check lists, social stories or other guides that can remind participants of key steps in meeting challenges that may jeopardize their housing.
- b. Identify and develop methods to overcome barriers to sustaining housing (i.e.: communicating with emergency service providers, following lease parameters, keeping your home clean)
- c. Develop and Refer to Crisis Plan

**ACTIVITY:** Ask the group if they have any other suggestions for how we can prepare in advance. This can be done in an open discussion or by entering the suggestions in the Chat. Another way to approach this activity is for the facilitator to prepare a list in advance/identify challenges we know happen. Or ask the group to name challenges they think might happen. Then ask the group to identify several ways to address and prepare for each example challenge.

### Facing Challenges

- Acknowledge that we all face challenges!
- Support person to identify barriers to sustaining housing and create a plan to overcome
- Assist person to create a plan to avoid a housing crisis and to communicate that plan to the person's supports team

[Slide 9]

The facilitator states:

While a goal of the tenancy sustaining portion of HTTS is to teach tenants skills that enable them to maintain their housing, the HTTS provider must be ready for changes that will require the provider to reengage and develop a new housing plan such as:

- a. Loss or change of housemate.
- b. Sale of property by landlord/owner.
- c. Increase in rent.
- d. Desire of tenant to move to a different location.

When these occur, the HTTS provider should work with the Supports Coordinator to ensure changes are reflected in the ISP as well as to add additional HTTS units if needed to create a new Housing Plan.

### **Addressing Changes Affecting Housing**

- Loss or Change of Housemate
- Sale of Property by Landlord/Owner
- Increase in Rent
- Loss of Income
- Desire to Move to a New Location

[Slide 10]

The facilitator states:

To maintain tenancy, it is important that the participant is supported to remain compliant with the lease.

The HTTS provider should provide continued training and support in being a good tenant and lease compliance, including ongoing support with activities related to household management. The PREP curriculum is a useful tool to assist with this task.

### **Lease Compliance**

Provide ongoing support to the participant

- ✓ Being a Good Tenant
- ✓ Understanding the Lease
- ✓ Ongoing Support with Activities Related to Household Management
- ✓ PREP Curriculum

[Slide 11]

The facilitator states:

This information can be helpful when assisting the participant to understand the role of being a good tenant. As a renter, you will have good landlords, and you will have bad ones. There's not much you can do when it comes to the person at the other end of your leasing agreement, but there are things you can do as a tenant to maintain a good relationship with the person whom you rent from. Figuring out how to assist the



participant to be a good tenant goes even a step further than that. It also means helping the participant to foster positive relationships with their neighbors and the other people in your community. There's a lot of incentive to consciously do what you can to be a good tenant, and a good neighbor. Fortunately, it's not really that difficult. Here's where to start.

The HTTS provider must communicate openly, honestly and directly with the participant. Coaching and mentoring them if needed to be responsible tenants. Below are some sample scripts:

Be honest in your application. There's a lot of competition out there for the best apartments. And when it comes to positioning yourself at the top of the application pile, it may be tempting to fudge the truth a little. Saying you don't have a pet when you really do or that you don't intend to have regular guests over when you know your significant other will essentially be living there with you may seem like small fibs. But they're likely to catch up with you. As with pretty much everything else in life, honesty is the best policy when you want to be a good tenant. And it all starts with your application.

Read the lease. Knowing what you agree to before you sign your lease is crucial for being a good tenant. There may be something in there that you would not otherwise know to adhere to, such as noise regulations that state you can't play loud music after 10pm or rules around how to make sure you get your security deposit back at the end of your rental term. Rental terms are not standard either. You will need to know how long your lease is for. Make sure the lease says what you, and the landlord, agree to. The lease is your contract and is binding on both of you. The more well versed you are in the (legally-binding) agreement between you and your landlord, the better tenant you are going to be.

Don't rent more than you can afford. The golden rule of housing costs is that they shouldn't account for more than 30 percent of your expenses every month. But in 2017, "fully two-thirds of renter households earned less than \$60,000," according to Harvard University's most recent State of the Nation's Housing report. With rental prices continuing to climb, it's becoming increasingly difficult for the large majority of renters to stick to the 30 percent rule.

Only you really know how much you'll be comfortable spending every month, but agreeing to an apartment that will require an unreasonably significant portion of your income can lead to late payments and missed payments. Part of being a good tenant is renting within your means, even when your means don't get you that in-unit washer/dryer you really want.

Paying your rent—and paying it on time—is one of the most basic tenets of how to be a good tenant. Your landlord should never have to hunt you down and ask for your rent to be paid. And unless your lease dictates that you have some flexibility in when lease payments are due (say, up to five days from the first of the month) make sure your

payment is dropped off on or before the due date. This will go a long way toward maintaining a strong relationship during your tenancy.

Not sure about something? Ask!

The saying “it’s easier to apologize than ask for permission” does not apply to the landlord-tenant relationship. If you want to paint a wall, adopt a cat, or upgrade an existing light fixture and you’re not sure if you’re allowed to, ask your landlord before making a move. Any exceptions to what are stated in your lease will need to be agreed upon between the two of you in writing. The lease needs to be updated, and signed by both of you, to prove that you both agree to the new details. Failure to do so can result in some serious penalties, including fines or an eviction. It will also erode trust in your ability to be a good tenant. The guidelines surrounding your relationship with your landlord are business-focused, not personal. So, do not make assumptions about what your landlord will be okay with just because you are on good terms.

#### **Being a Good Tenant**

- ✓ Be Honest!
- ✓ Read the Lease and Respect the Rules
- ✓ Don't Rent More Than You Can Afford
- ✓ Pay Your Rent
- ✓ Ask if Not Sure

[Slide 12]

The facilitator states:

Make sure the participant has a plan to review all mail. It’s important to respond to requests for information from landlords and Housing Authorities. Here are a few recommendations:

- a. Remind tenant to open all mail and alert HTTS provider to any mail coming from Housing Authority or landlord or any mail self-advocate is unsure of.
- b. Review mail from the Housing Authority or landlord with tenant and explain next steps needed.
- c. Assist tenant in obtaining requested documentation such as proof of current income and sending it to the Housing Authority.
- d. Work with tenant to address any questions the Housing Authority or landlord may have about recertification or continued tenancy.

## Housing Recertification

- Alert HTTS Provider to any mail coming from Housing Authority, Landlord or any mail Self-Advocate is unsure about
- Review mail from Housing Authority or Landlord and explain next steps needed
- Assist tenant in obtaining requested documentation
- Assist with addressing any questions the Housing Authority or Landlord may have

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[Slide 13]

The facilitator reads the slide and then states:

While we want to avoid eviction at all costs, there are times when eviction is unavoidable. Know your rights and your resources as a tenant.

## Avoiding Eviction

### What the wavier says...

Assistance with activities such as supporting the participant in communicating with the landlord and/or property manager; developing or restoring interpersonal skills in order to develop relationships with landlords, neighbors and others to avoid eviction or other adverse lease actions; and supporting the participant in understanding the terms of a lease or mortgage agreement.

### What we need to know...

- Understanding a lease
- Understanding a mortgage
- Communicating with Landlords

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[Slide 14]

The facilitator states:

If eviction is imminent, there are resources that can be used to assist with understanding the eviction process. Here are some resources that may be helpful.

The facilitator reads the slide.

## Resources for Eviction

- Local Legal Aid programs/Regional Housing Legal Services  
<https://palegalaid.net/>  
[www.rhls.org](http://www.rhls.org)
- Local county/city Homeless Assistance Program agencies  
[http://services.dpw.state.pa.us/oimpolicymanuals/cash/138\\_Allowances\\_and\\_Benefits/138\\_Appendix\\_E.htm](http://services.dpw.state.pa.us/oimpolicymanuals/cash/138_Allowances_and_Benefits/138_Appendix_E.htm)
- HUD housing counselor agencies  
[https://www.hud.gov/I\\_want\\_to/talk\\_to\\_a\\_housing\\_counselor](https://www.hud.gov/I_want_to/talk_to_a_housing_counselor)
- RHLS – Regional Housing Legal Services  
<https://www.rhls.org/>

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[Slide 15 & 16]

The facilitator states:

If you're supporting a participant who is the homeowner or is planning to become a homeowner, they will need to understand they are responsible for the cost of repairs. The next two slides list a few resources that can be helpful for the participant to save money without impacting waiver benefit eligibility, apply for low interest loans, and access public and private programs that assist with the cost of home repairs.

The facilitator reads the slide and then asks if anyone is aware of additional programs in their area.

<p><b>Home Repairs for Homeowners</b></p> <ul style="list-style-type: none"><li>• The ABL account is a good way to save for home repairs and maintenance <a href="https://paable.gov/">https://paable.gov/</a></li><li>• Special needs trusts can also be used for home repairs</li><li>• Some counties &amp; cities have their own home repair programs <a href="https://www.phila.gov/departments/division-of-housing-and-community-development/get-help/get-home-improvement-help/">https://www.phila.gov/departments/division-of-housing-and-community-development/get-help/get-home-improvement-help/</a></li></ul>	<p><b>Home Repairs, cont.</b></p> <ul style="list-style-type: none"><li>• USDA provides 1% interest loans for home repairs in areas of PA designated rural. <a href="https://www.rd.usda.gov/programs-services/single-family-housing-programs/single-family-housing-repair-loans-grants/pa">https://www.rd.usda.gov/programs-services/single-family-housing-programs/single-family-housing-repair-loans-grants/pa</a></li><li>• Local Habitat for Humanity Chapters (Philadelphia has a repair program) <a href="https://www.habitatphiladelphia.org/home-repair-program/">https://www.habitatphiladelphia.org/home-repair-program/</a></li></ul>
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[Slide 17]

The facilitator states:

There are programs to assist with weatherization for homeowners. This slide provides a link to look up the program in your area. If the participant is renting, they should discuss the program with their landlord and complete the application together.

**Weatherization for Homeowners**

Provided through local community action agencies

- List of agencies  
<https://dced.pa.gov/housing-and-development/weatherization/agency-list/>
- For more information  
<https://dced.pa.gov/programs/weatherization-assistance-program-wap/>

[Slide 18]

The facilitator states:

Unanticipated situations are a fact of life. Revisit Crisis Plan regularly and update as life situations change.

- a. Coordinate with the tenant to review, update and modify their Housing Support and Crisis Plan on a regular basis to reflect current needs and address existing or recurring housing retention barriers.
- b. Work with the Supports Coordinator and team to identify resources to contact during a crisis that requires tenant to relocate.
- c. If hospitalization or other absence is anticipated, identify what will be needed to maintain housing during absence such as:
  1. Payment of rent
  2. Payment of mortgage
  3. Paying utilities
  4. Stopping mail
  5. Caring for pets or plants
  6. Removing perishables and trash

### Planning for Unanticipated Situations

- Review, Update and Modify Housing Support and Crisis Plan Regularly
- Work with Supports Coordinator and Team to Identify Resources to Contact During a Crisis that Requires Tenant to Relocate
- If Hospitalization or other absence is anticipated, identify needs to address to maintain housing during absence such as:
  - ✓ Payment of rent
  - ✓ Stopping mail
  - ✓ Caring for pets or plants
  - ✓ Removing perishables and trash

[Slide 19]

The facilitator reviews the key takeaways and provides an opportunity for the group to ask questions.

### Key Take Aways

- Everyone faces challenges.
- The HTTS Provider can support participants to address changes effecting their housing.
- There are resources for home repairs that may make sustaining tenancy possible.
- Utilizing a crisis plan helps participants avoid negative housing outcomes through planning.

[Slide 20]

The facilitator states:

We're at the end of the training. You will receive an email confirming you attended, the total number of hours, and copies of the power point slides.

We covered a lot of material. Does anyone have additional questions before we end? You can enter your question in the Chat or use the raised hand feature if you prefer to speak.

NOTE: The facilitator should insert their contact information on this slide prior to the training.

### Wrap Up & Questions

Congratulations! You have completed the Housing Transition & Tenancy Sustaining Service training.

You will receive email confirmation of attendance in the next few days.

Please complete the Satisfaction Survey!

Contact Information

[INSERT CONTACT INFORMATION HERE]

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[Slide 21]

This slide acknowledges the project partners, funding source, and the copyright.

### Acknowledgement

This training was developed by the PA Health Law Project, Values Into Action, PA Assistive Technology Foundation and Regional Housing Legal Services with grant funding from the Pennsylvania Developmental Disabilities Council. It is the culmination of five plus years of collaborative work.

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Follow Up Tasks:

At the conclusion of the training, the facilitator will provide confirmation of attendance to the participants. This can be an email stating the title of the training, dates of attendance, and total training hours. The facilitator may also choose to provide a certificate of attendance. The participants will use this as proof of attendance for their employer and to establish they have begun to acquire the knowledge necessary to qualify to deliver the Housing Transition & Tenancy Sustaining service.

The facilitator should consider creating and distributing a post survey to gather feedback on the training from the perspective of the participants.

The facilitator should also encourage the participants to register for and complete the Prepared Renters Education Program (PREP) training available through the Self-Determination Housing of Pennsylvania.

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