

**Step 1.** The Case Manager (CM) collects applicable documents on [BSS+ESG-CV Community Housing Referral Checklist](#) and completes the [BSS+ ESG-CV Community Housing Referral Form](#). The documents and referral form are emailed to the BSS+ ESG-CV referral email box, [esgreferrals@caritasofaustin.org](mailto:esgreferrals@caritasofaustin.org). Note: Referrals received, after 4:30 P.M., will be reviewed next business day.



**Step 2.** The Director of BSS+ Programs reviews the referral submission within one business day of receipt and, upon verification that the necessary documents and information are present, assigns the referral to a Community Housing Specialist (CHS). (If the Director determines that additional items are needed or the referral is incomplete, the CM will be notified and the process starts back at Step 1.)



**Step 3.** Within two business days of assignment, the CHS responds to the CM acknowledging receipt of the referral and sets up a call with the CM to review the client's referral and discuss the approach for providing service to the client (refer to the Community Housing Referral Checklist). The CHS sends CM an email recap of the conversation to include a summary of items still outstanding to create a successful application packet for the client.



**Step 4.** Partner Agency's assigned AmRent Reporter will run AmRent report and CM will summarize and include AmRent summary with referral. If Partner Agency does not have an assigned AmRent Reporter, CHS will run AmRent report and provide summary to CM.



**Step 5.** The CHS begins the housing search based on the client's preferences. This includes speaking with proposed properties to introduce the program and to understand the property's willingness to work with specific barriers.



**Step 6.** CHS emails housing options and follows up on outstanding documents with the CM. Within one business day, the CM responds to the CHS with the client housing choices and provides the outstanding information.



**Step 7.** After receiving the client's property selections and all the information necessary for a successful application packet, the CHS and CM will work together in coordinating property visit and application initiation.



**Step 8.** The CM attends the property tour with the client and if the client is interested, the application process may begin at that time. If the CM needs assistance or has questions in the application process, the CHS is available to answer those questions. The CM is responsible for completing the check request process for payment of application fees (and security deposit if necessary at this time). This includes collecting, from the property, the LLV necessary to complete the check request.

**Step 9.** The CHS and CM maintain regular contact to update each other on the progress of the application throughout the application process.



**Step 10.** Once the application is approved, the approval is communicated between the CHS and the CM. (Whoever gets the notice of approval communicates to the other.) This includes when the unit will be ready and the expected move-in date.



**Step 11.** The rent reasonableness form, rental assistance agreement, and incentive addendum (if applicable) is completed by the CHS and emailed to the CM for signatures and the case file.



**Step 12.** The habitability inspection is completed and the signing of the rental assistance agreement and incentive addendum (if applicable) is facilitated by the CM. (The CHS can complete this step in the event of an emergency.)



**Step 13.** The CM completes the check request for the security deposit (if not paid previously), first months' rent, and any signing bonuses. Also, CM accompanies the client to lease signing, delivers payments, assist client in connecting utilities and processes any necessary check request for utility assistance.



**Step 14.** The case manager processes ongoing monthly check requests for rent and utilities and makes regular contact with both the client and the property to ensure an ongoing productive relationship. (Check requests for the following month's rent may be submitted after the 15<sup>th</sup> of the current month.)



**Step 15.** If there is an issue between the client and the property, the CM may request assistance from the CHS to assist with resolution with the issue and to mediate with the property management if necessary.

Please note that a workflow cannot anticipate every possibility and that steps may not always occur in this exact order. There will be special circumstances that demand a change in procedure from time to time. However, habitability inspection, rent reasonableness, rental assistance agreement and incentive addendum (if indicated) must always occur before payment of first months' rent and any incentive.

Revised: 10/12/2021