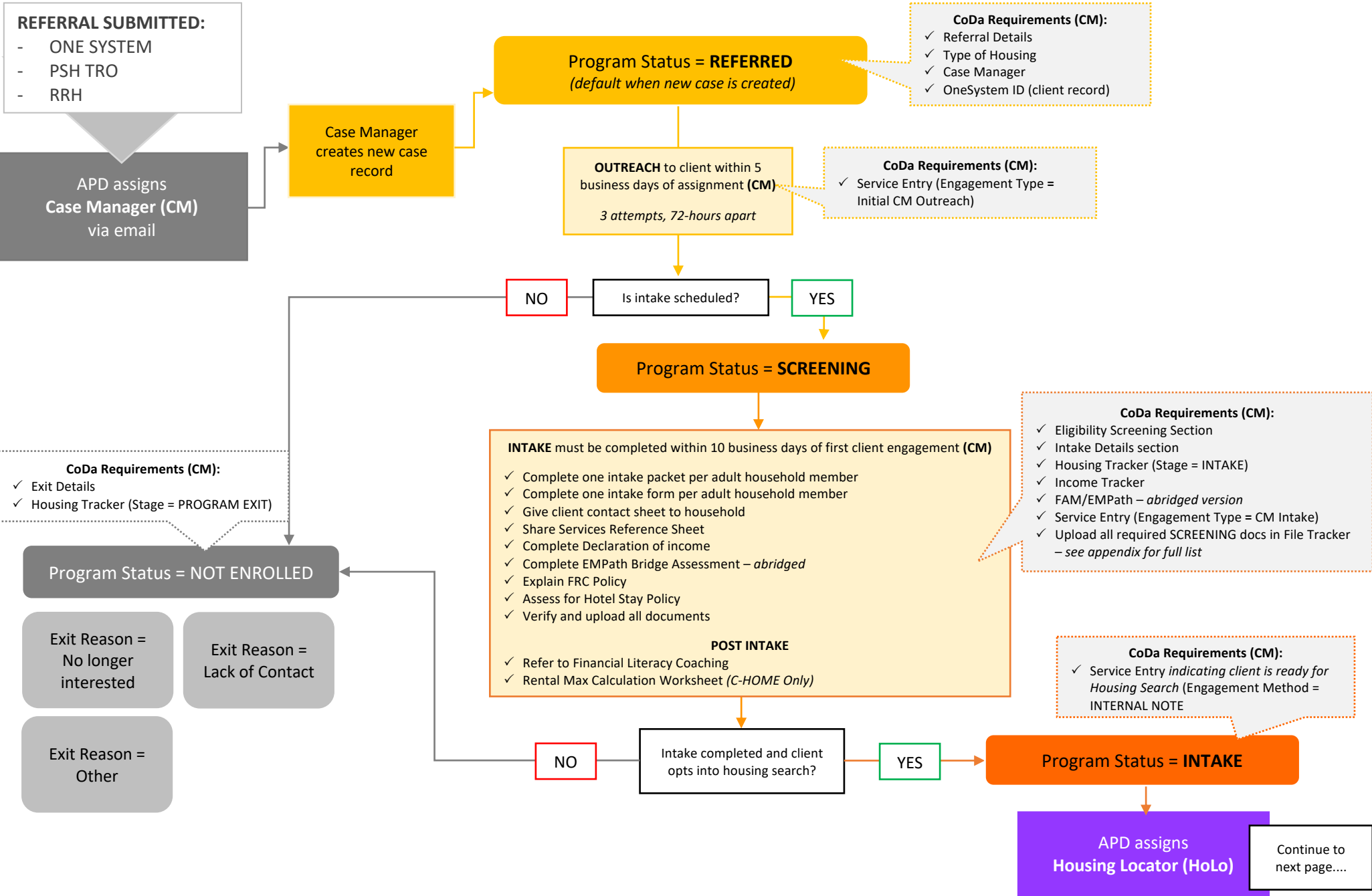
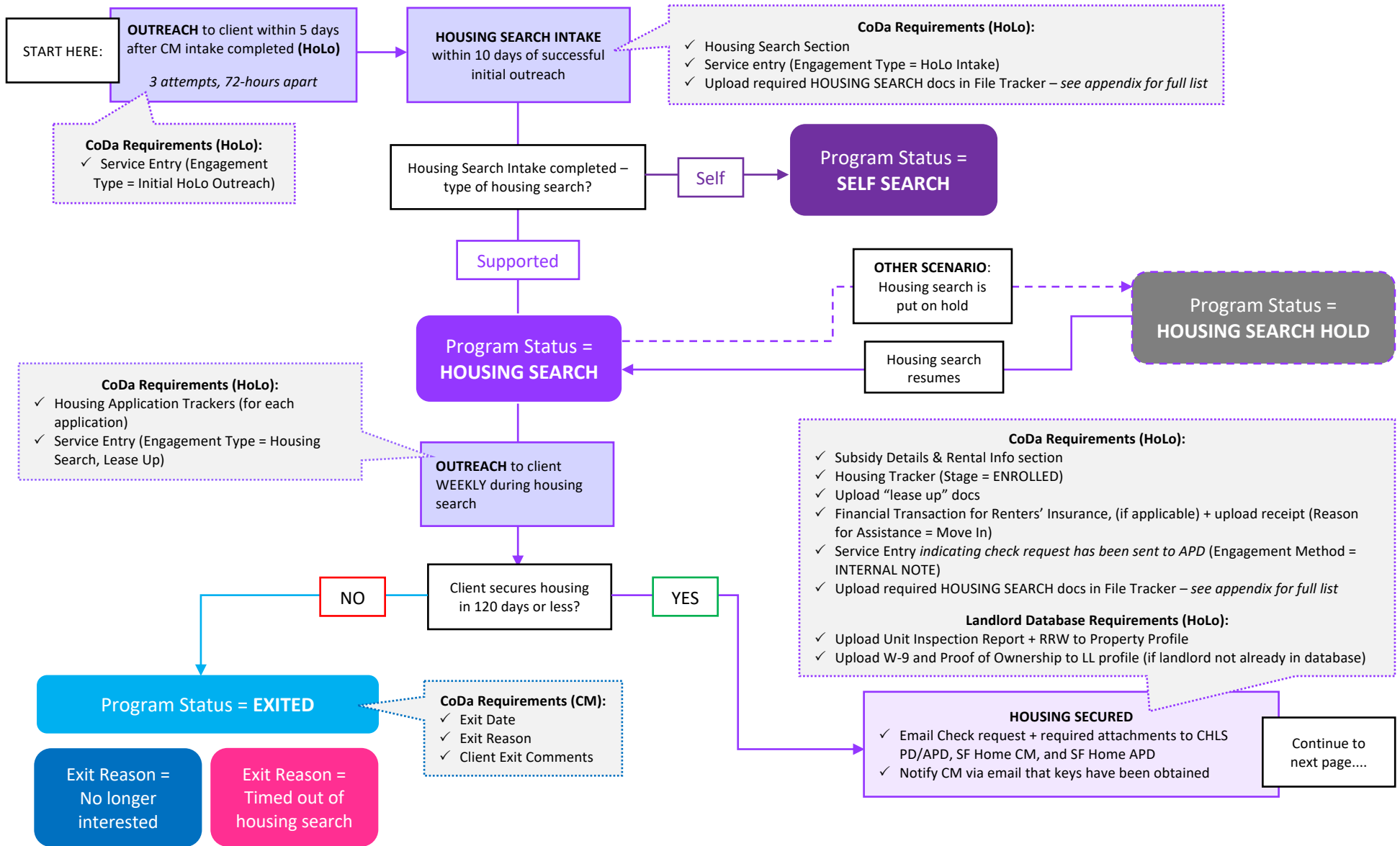


SF HOME CODA WORKFLOW

PART I. REFERRAL, SCREENING & INTAKE PHASE



PART II. HOUSING SEARCH



PART III. MOVE-IN & ENROLLED

START HERE

FAMILY MOVES IN

- ✓ Turn on utilities
- ✓ Request moving assistance (if needed)
- ✓ Request Welcome Home kit
- ✓ Arrange furniture purchase

CoDa Requirements (CM)

- ✓ Service Entry *indicating family is housed* (Engagement Method = INTERNAL NOTE)
- ✓ Financial Transaction for Movers, (if applicable) + upload receipt (Reason for Assistance = Move In)
- ✓ Financial Transaction for Furniture, (if applicable) + upload receipt (Reason for Assistance = Furniture)
- ✓ Household Expense tracker (C-Cares only)
- ✓ Upload required ENROLLED docs in File Tracker – *see appendix for full list*

CoDa Requirements (CM)

- ✓ Service Entry (Engagement Type = Case Management, Home Visit, Recertification, Exit Planning – *C-Home only*)
- ✓ FAM/EMPath – full
- ✓ Goals

Program Status = ENROLLED

FIRST 90 DAYS: Weekly OUTREACH + Monthly HOME VISIT

(90 DAYS + BEYOND:

- ✓ **C-Home** = 2x monthly outreach, 1x monthly in-person, quarterly EMPATH/FAM + goals, quarterly Recertification, exit planning 3 months before end of 2nd year and 3rd year
- ✓ **Flex Pool** = 2x monthly outreach, quarterly in-person, quarterly EMPATH/FAM + goals, annual Recertification
- ✓ **Housing Ladder** = Monthly outreach, annual in-person, annual EMPATH/FAM + goals, annual Recertification

OTHER SCENARIO:

Family plans to relocate while in the program

Program Status = ENROLLED/SEARCHING

When family relocates

CoDa Requirements (HoLo):

- During relocation search:**
Same as initial Housing Search +
- ✓ Relocation Details section
- Once new housing is secured:**
Same as initial Housing Search +
- ✓ NEW Enrolled Housing Tracker
 - ✓ Updates to relevant fields in the Subsidy Details & Rental Information section

OTHER SCENARIO:

Subsidy pauses mid-lease

Program Status = SUBSIDY PAUSED

When subsidy resumes

CoDa Requirements (CM)

- ✓ Program Status Change Note – indicate the reason for the pause. Must update once subsidy resumes.
- ✓ No outreach requirements during pause

Family has reached 1-year mark, is stably housed and fully in compliance and opts out of case management (*C-Cares only*)

Program Status = ENROLLED - GRADUATED

CoDa Requirements (CM)

- ✓ Monthly/bi-monthly outreach no longer required
- ✓ Annual recertification only

Family has reached 2-year mark and received 3rd year extension (*C-Home only*)

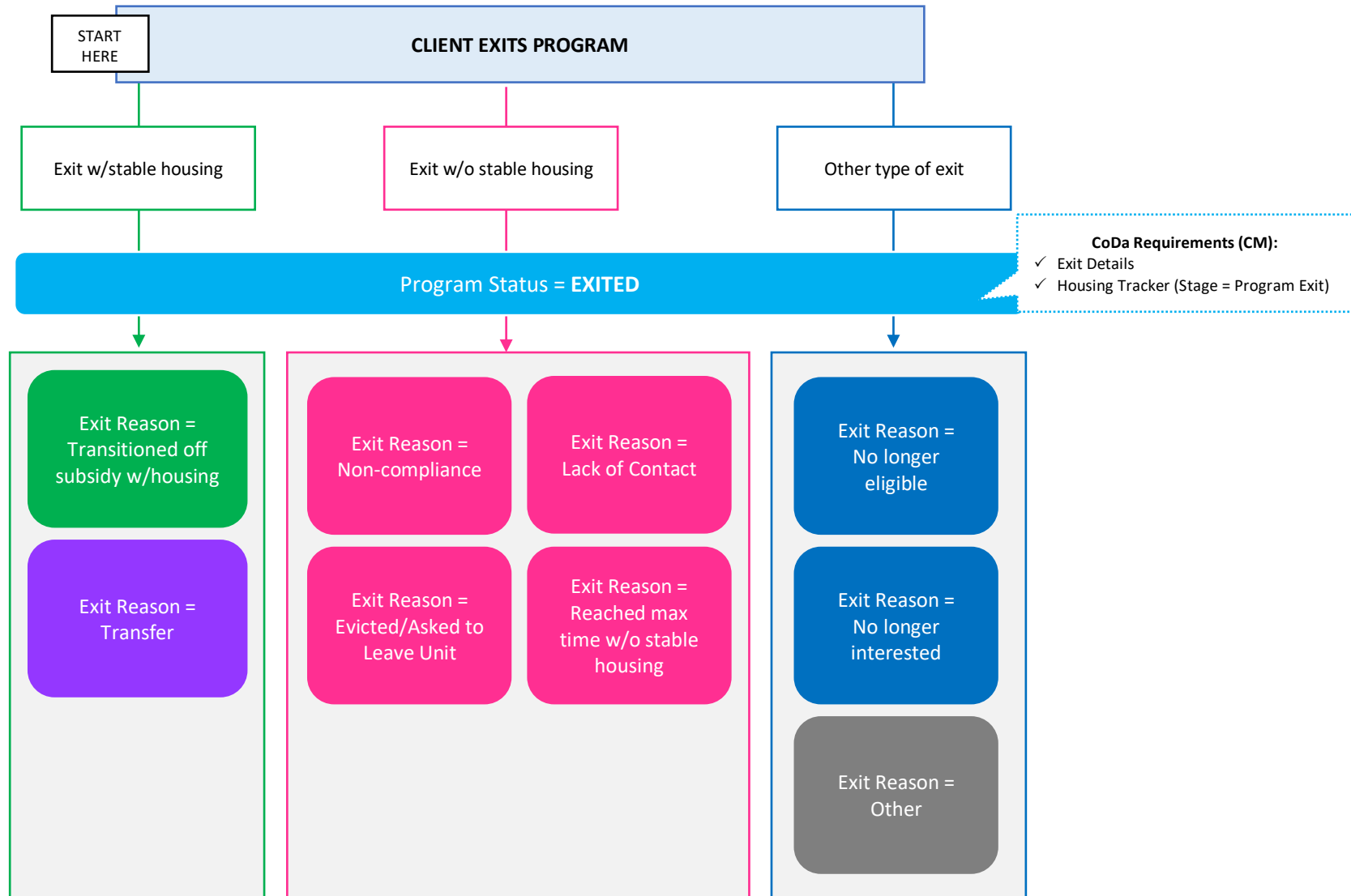
Program Status = ENROLLED - EXTENSION

CoDa Requirements (CM)

- ✓ Planned subsidy term – update to indicate 36 months

CLIENT EXITS PROGRAM – Next page.....

PART IV: EXIT



APPENDIX: REQUIRED DOCUMENTS

PROGRAM STATUS	DOCUMENT NAME
Screening & Intake	<p>INTAKE</p> <ul style="list-style-type: none"> ✓ Phone ID ✓ Proof of Legal Custody ✓ Social Security Card (Optional) ✓ Reasonable Accommodation (Optional) ✓ Child School Enrollment Verification ✓ Intake Packet ✓ Declaration of Income ✓ Proof of Income ✓ EMPath Bridge – <i>abridged</i> <p>POST-INTAKE</p> <ul style="list-style-type: none"> ✓ Rental Max Calculation Worksheet (C-Home only)
Housing Search	<p>HOUSING SEARCH</p> <ul style="list-style-type: none"> ✓ Subsidy Award Letter ✓ Self-Search Form (Optional) ✓ Reasonable Accommodation (Optional) ✓ Utility Allowance Worksheet ✓ Housing Search Hold Letter (Optional) ✓ Engagement Warning Letter (Optional) ✓ Extension Request Form (Optional) <p>HOUSING SECURED</p> <ul style="list-style-type: none"> ✓ Unit Inspection ✓ Check Request ✓ Promissory Note (Optional) ✓ Intent to Rent ✓ W-9 ✓ Proof of Ownership ✓ Renters Insurance Receipt (Optional) ✓ Signed Lease and Addenda ✓ Final Exit Letter (Optional) ✓ Rent Reasonableness (C-Home only, Optional)

Enrolled

ENROLLED

- ✓ **Signed Furniture Invoice**
- ✓ Moving Company Invoice (Optional)
- ✓ **First Recertification**
- ✓ **Annual Unit Inspection**
- ✓ Subsidy Award Letter (Optional)
- ✓ Engagement Warning Letter (Optional)
- ✓ Subsidy Compliance Agreement (Optional)
- ✓ Final Exit Letter (Optional)
- ✓ Rental Max Calculation Worksheet (C-Home only, Optional)

EXIT-RELATED

- ✓ 3rd Year Transition Agreement (C-Home only, Optional)
- ✓ **Exit Planning Packet (C-Home only)**
- ✓ **90/60/30 Day Exit Warning Letters (C-Home only)**