The mission of the Office of Developmental Programs is to support Pennsylvanians with developmental disabilities to achieve greater independence, choice and opportunity in their lives.

AUDIENCE: Individuals and Families, Administrative Entities, Supports Coordinators and Supports Coordination Organizations, Providers of services under the Consolidated, Person/Family Directed Support (P/FDS), and Community Living Waivers

PURPOSE: This Office of Developmental Programs (ODP) communication is intended to provide further instructions and clarification on the use of Housing Transition and Tenancy Sustaining Services available through the Consolidated, Person/Family Directed Support, and Community Living waivers (hereafter referred to as Intellectual Disability and/or Autism (ID/A) waivers).

BACKGROUND:

The 2016 Everyday Lives publication included 13 recommendations for supporting people with developmental disabilities to live Everyday Lives. Recommendation 10 is “EXPAND OPTIONS FOR COMMUNITY LIVING: 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 to locate affordable and accessible housing, find housemates, and identify housing resources/supports and other government benefits that, when blended with natural supports, will promote an everyday life.”

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. 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.
PROVIDER QUALIFICATIONS:

Agencies must meet the following standards:

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 provider 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 know how to access, refer to, and inform others on the following programs or resources, including, but not limited to:
   
   • Housing choice vouchers
   
   • Section 811 Project Rental Assistance (PRA)
   
   • Mainstream/Non-Elderly Disabled (NED) vouchers
   
   • Project based operating assistance
   
   • Tenant based rental assistance: Home Investment Partnerships Program (HOME) and Nursing Home Transition (NHT)
   
   • 20% Units Low-Income Housing Tax Credit (LIHTC) deeply affordable/accessible units
   
   • Fair housing
   
   • Reasonable accommodations
   
   • Homeownership programs
   
   • United States Department of Agriculture (USDA) rural housing services, loans, and grants
   
   • Local and regional housing providers, housing resources, and organizations serving persons with disabilities and older adults
   
   • Privately financed housing opportunities and any other project-based subsidies, local-
state-federal housing initiatives as they are available

- Discharge processes from various institutional and residential settings
- Home Modifications funded through the Department, PA Housing Finance Agency (PHFA), and Department of Community and Economic Development (DCED)
- Olmstead requirements
- Housing First
- Trained in Prepared Renters Program (PREP) training for agencies
- Ability to use PAHousingSearch.com

To show qualification in each of these areas, providers should submit a list of trainings, experience, and certifications. Verification of necessary knowledge and experience may be demonstrated through a provider brochure, documentation of references, website information, annual report, and/or training certificates.

8. Comply with Department standards related to provider qualifications.

**Staff working for or contracted with the agency, as well as volunteers utilized in providing this service if they will spend any time alone with an individual, must meet the following standards:**

1. Be at least 18 years of age.


3. Have child abuse clearance (when the individual is under age 18) per 23 Pa. C.S. Chapter 63.

**Verification of Provider Qualifications and Entity Responsible for Verification:** The Administrative Entity is responsible for ensuring that each provider meets qualification standards prior to rendering Housing Transition and Tenancy Sustaining Services. After the provider is initially qualified, the Administrative Entity will ensure that the provider continues to meet qualification standards at least once during a 3-year Quality Assessment and Improvement monitoring cycle and more frequently when deemed necessary by ODP. New providers may be qualified more frequently depending on which monitoring cycle to which they are assigned.

**RESOURCES:**

1. **Cents and Sensibility by the Pennsylvania Assistive Technology Foundation (PATF) – A comprehensive guide to money management for individuals.** PATF also has an educator companion manual to help practitioners better support individuals’ financial education
needs. PATF is a statewide, nonprofit organization that helps individuals with disabilities and older Pennsylvanians acquire the assistive technology devices and services they want. PATF is a state- and federally-certified Community Development Financial Institution (CDFI) and is the Commonwealth’s designated Alternative Financing Program.

2. **Consumer Financial Protection Bureau (CFPB)** – A federal government agency that regulates the offering and provision of consumer financial products or services. CFPB provides financial education tools and other financial resources to practitioners.

3. **Financial Education and Coaching Program by the Pennsylvania Housing Finance Agency (PHFA)** – This program was developed to help renters, homebuyers, and homeowners understand and improve their personal finances. Visit the website for the PHFA Financial Education and Coaching Program and locate a counseling agency in your area.

4. Local Lead Agency (LLA) – The LLAs are designated lead human/social service agencies which work in conjunction with the Regional Housing Coordinators (RHC) to organize the Local Referral Network.

5. Local Referral Network (LRN) – Local coalitions organized by the Local Lead Agency and Regional Housing Coordinators which serve as a network of resources, information, and referrals to housing in the community. The LRN is comprised of Local Lead Agencies, human services organizations, service providers, housing providers, and Regional Housing Coordinators.

   Housing providers may include local housing authorities, local community and economic development agencies, property developers/owners, property managers, landlord associations, the homeless Continuums of Care, the PA Housing Finance Agency, the Pennsylvania Department of Community and Economic Development.

   Human service organizations may include: community action agencies, legal aid networks, local community foundations, philanthropic foundations, or larger national organizations.

6. Medical Assistance Transportation Program (MATP) – Medical transportation services available to Supplemental Security Income recipients and Medical Assistance (MA) recipients who have no other way of traveling for necessary medical care or prescription drugs. MATP is available only in certain counties.

7. Money Smart by the Federal Deposit Insurance Corporation (FDIC) – **Money Smart** is a comprehensive financial education curriculum designed to help low- and moderate-income individuals outside the financial mainstream enhance their financial skills and create positive banking relationships.

8. Nursing Home Transition Tenant-Based Rental Assistance (NHT TBRA) – A temporary rental subsidy for income eligible individuals transitioning out of a nursing home. NHT TBRA can provide rental assistance for up to 24 months for individuals who are on a waiting list for a
permanent housing subsidy. The individual pays a portion of the rent set at approximately 30% of their income while NHT TBRA pays the remaining amount.

9. **PA Housing Search** – An online interactive search tool that helps people look for affordable and accessible homes and apartments in Pennsylvania. Property owners and landlords participate for free by advertising their available apartments.

10. Pennsylvania ABLE Savings Program (PA ABLE) – The PA ABLE is a state program that gives individuals with qualifying disabilities a tax-advantaged way to save or invest without impacting their government benefits. [PA ABLE](#) is administered by the Pennsylvania Treasury Department.

11. Pennsylvania Housing Finance Agency (PHFA) – PHFA works to provide affordable homeownership and rental apartment options for older adults, low- and moderate-income families, and people with disabilities who have special housing needs. Through its carefully managed mortgage programs and investments in multifamily housing developments, PHFA also promotes economic development across the state.

12. Regional Housing Coordinators (RHC) – A team of regional housing experts who serve as a single point of contact for both housing providers and social service agencies regarding resources and information related to housing and services for people with disabilities. RHCs provide technical assistance to community systems to identify and expand housing options for people with disabilities and older adults. They conduct outreach and provide a variety of housing trainings, including the Prepared Renter Education Program (PREP) in a train the trainer format.

13. Section 811 Supportive Housing for Persons with Disabilities (811 Program) – The 811 Program is a U.S. Department of Housing and Urban Development supportive housing program that assists people with extremely low-incomes and disabilities to live independently in the community by providing affordable housing linked with voluntary services and supports.

14. U.S. Department of Housing and Urban Development (HUD) – The Federal government agency that oversees the administration of multifamily housing programs, including Supportive Housing for the Elderly (Section 202) and Supportive Housing for Persons with Disabilities (Section 811). HUD administers the Housing Choice Voucher Program (formerly Section 8), Project-Based Vouchers, and through privately owned subsidized housing, help apartment owners offer reduced rents to low-income tenants.

**DISCUSSION:**

**Service Definition:**
The Housing Transition and Tenancy Sustaining Service includes pre-tenancy and housing sustaining supports to assist individuals in being successful tenants in private homes owned, rented, or leased by the individuals. The concepts and philosophy of person-centered planning should be incorporated throughout the development and implementation of individual housing
service plans. Lastly, every possible scenario cannot be accounted for in this guidance and as such, the lists of issues and solutions contained here are not exhaustive.

Tenancy support services may not be authorized for individuals who have the following authorized services on their Individual Support Plan (ISP):

- Residential Habilitation,
- Life Sharing or
- Supported Living services

Housing Transition services may be authorized when the individual has a plan to move from the home where Residential Habilitation or Life Sharing is provided into a private home that the individual will own, rent, or lease. Financial support that constitutes a room and board expense is excluded from federal financial participation in the ID/A waivers.

This service can only be delivered in Pennsylvania.

**Housing Transition services are direct services provided to individuals that include the following activities to be completed by the provider:**

1. **Conducting a tenant screening and housing assessment that identifies the individual’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 should include identification of the individual’s preferences, such as whether they want to live with anyone, where they want to live, and when they would like to move. It should also consider the individual’s needs, such as geographic location, availability of services, accessibility features/assistive technology/home modifications, or a need for financial education. The housing assessment should also include identification of barriers specific to the individual. Barriers to housing transition and retention commonly include criminal backgrounds, poor or no credit history, poor or no rental history, limited income, lack of proper documentation, lack of accessibility features and/or public transportation in or around the property (if a property is already identified). Each preference, need, and barrier often impacts or overlaps with other aspects of the assessment and planning process. For example, the geographic location may fall within all three categories. The individual may prefer to live in a rural town near a friend or family member, the individual needs access to public transportation and accessible sidewalks, but a barrier exists in that the rural town has limited public transportation and no accessible sidewalks.

2. **Developing an individualized Housing Support Plan with the individual based upon the housing assessment that addresses identified barriers, includes short and long-term measurable goals for each issue, establishes the individual’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.

In developing the Housing Support Plan the provider should use the assessment results to develop short and long-term measurable goals, identify strategies and resources (housing services, essential interventions, and financial assistance), and develop a crisis plan needed to achieve those short- and long-term goals. The Housing Support Plan will also identify who provides the services and supports and will clarify individual and provider roles and responsibilities. The plan should be updated as an individual’s needs change and evolve.

3. **Assisting with the housing search process.**

Referring to the individual’s Housing Support Plan, assist the individual in identifying appropriate and sustainable housing. There are numerous housing locator and search resources for finding housing, including newspapers, housing search databases, or community clearinghouses. Many communities have resources strictly at the local level that are not included here, for example, a municipality or local housing authority may maintain a list of landlords that regularly work with individuals with disabilities or low-incomes. Descriptions of some of the larger state and federal resources are included below, but should not be relied on exclusively.

Housing search resources may include:

- **PA Housing Search** – An online interactive search tool that helps people look for affordable and accessible homes and apartments in Pennsylvania. Search for housing by topics such as rent amount, area of interest, accessibility, or availability of public transportation. Property owners and landlords participate for free by advertising their available apartments. The website link and a bi-lingual, toll-free number are listed below.

  You can also find additional statewide information and resources, including a rental checklist, rent calculator, information on services, transportation, Frequently Asked Questions related to renting, and much more by visiting the “Resources” section of PA Housing Search.

  Providers can also schedule a free training for their agency to learn more about the features of PA Housing Search and how to best use them.  
  [www.pahousingsearch.com](http://www.pahousingsearch.com) or call Toll-Free: 1-877-428-8844

- **Public Housing Authorities** – If you need public housing assistance or information about public housing programs, such as Housing Choice Vouchers (HCVs; formerly known as Section 8 Vouchers), please contact your local public housing authority (PHA). The HCV program is the federal government’s major program that assists very low-income families, older adults, and individuals with disabilities with obtaining decent, safe, and sanitary housing in the private housing market.
• **Rural Development Multi-Family Rental Housing Search Tool** – The U.S. Department of Agriculture’s web-based rural housing search tool allows you to click on your county to find information about housing in your area.

Depending on the area, it may also be helpful to develop and maintain a list of local landlords with whom your agency has established relationships. When reviewing potential properties, the suitability of the property should be considered and aligned with the Housing Support Plan. Important features or characteristics of the property may include access and proximity to or availability of:

- Amenities such as grocery stores, doctors’ offices, pharmacies, etc.
- Public transportation
- Medical Assistance Transportation Program (MATP) or Shared Ride or other transportation programs
- Sidewalks and curb cuts
- Accessibility around the property, such as curb ramps, laundry facilities, outdoor spaces
- Accessibility within the apartments
- Service providers and necessary services
- Home modifications

In addition to the characteristics of the properties, the individual’s budget and proximity to employment should also be considered. When searching for apartments/homes, the individuals should tour the unit under consideration and when appropriate, conduct an overnight visit. Barriers that prevent an individual from touring an apartment should be documented. In those cases, descriptions and pictures of the apartment under consideration should be provided to the individual to support them through this important decision-making process.

4. **Assisting with the housing application process, including assistance with applying for housing vouchers/applications.**

Assist the individual to collect required documentation that are needed to apply and be eligible for housing, including personal identification, proof of income, references and credit history, and identification of potential reasonable accommodations related to the individual’s disability. Assist an individual with obtaining, completing, and submitting applications to secure rental assistance, applying for housing, and requesting reasonable accommodations, if necessary. Some examples of common housing assistance resources include:

- Housing Choice Vouchers (previously known as Section 8 Vouchers)
- Mainstream/Non-Elderly Disabled (NED) Vouchers
- Project Based Operating Assistance (PBOA)
- Section 811 Project Rental Assistance Demonstration (811)
- 20% Area Median Income Units (Low-Income Housing Tax Credit properties – see marketing pipeline and PA Housing Search)
- Public Housing
5. **Identifying resources to cover expenses such as security deposit, moving costs, furnishings, adaptive aids, environmental modifications, moving costs, and other one-time expenses.**

Identify common financial resources the individual is eligible for and assist the applicant in applying for them. Some examples of resources include the Pennsylvania Housing Finance Agency, Pennsylvania Assistive Technology Foundation, and ID/A waivers. **Ensuring that the living environment is safe and ready for move-in.** Immediately prior to the move-in, conduct or facilitate a physical inspection to ensure the housing is safe, clean, ready for occupancy, and all move-in coordination activities are complete. Confirm that the utilities are turned on, a change of address was submitted, home modifications are complete if needed, and furniture/furnishings and household supplies are available.

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7. **Assisting in arranging for and supporting the details of the move.**

Assist the individual in preparing for move-in activities such as:
- Working with the property manager to schedule a mutually agreed upon move-in date and the physical inspection/habitability check described above.
- Confirming the availability of funds for security deposits, utility deposits, and first month’s rent; scheduling a date for the utilities to be turned on and confirming home modifications are nearing completion or are complete.
- Confirming the availability of furnishings and housing supplies (food/cleaning supplies/etc.).
- Scheduling moving assistance if needed and submitting a change of address.
- Helping the individual to access the necessary resources to cover the expenses related to the move.

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

Work with the individual to identify situations that could jeopardize the individual's housing and develop and identify appropriate intervention services to respond early to these situations. Clarify individual and provider staff roles and responsibilities. Identify other community resources and develop an emergency contact protocol to assist in a successful tenancy or homeownership. The plan and interventions are adjusted as needs change.

9. **Assistance with finding, establishing and building a relationship for community integration.** The provider should work with the individual and their Supports Coordinator on identifying potential housemates and other community members that may be supportive. To identify potential housemates, the ISP team should consider what qualities are important to the individual and his or her short- and long-term goals. If there are no immediate options for a housemate that matches those desired qualities, the provider should work with the Supports Coordinator on outreach to local SCOs and Administrative Entities to find other potential options. When a potential housemate is identified, the housing service provider
should foster the development of a friendship/relationship between the individual and the potential housemate, and update the Housing Support Plan accordingly.

10. **Assistance with identifying and obtaining resources to assist the individual 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 individual, including special needs trusts and ABLE accounts.

Financial education curriculums such as Cents and Sensibility, PHFA’s financial education resources, PA Treasury ABLE Accounts, FDIC’s Money Smart, are available. These resources come in a variety of formats, some are intended to support individuals directly, while others are for the provider.

- **Cents and Sensibility by the Pennsylvania Assistive Technology Foundation (PATF)** – Cents and Sensibility is a comprehensive guide to money management for Individuals. PATF has also developed an educator companion manual to help practitioners better support their Individuals’ financial education needs. PATF is a statewide, non-profit organization that helps individuals with disabilities and older Pennsylvanians acquire the assistive technology devices and services they want. PATF is a state and federally-certified Community Development Financial Institution (CDFI) and is the Commonwealth’s designated Alternative Financing Program.

- **Consumer Financial Protection Bureau (CFPB)** – A federal government agency that regulates the offering and provision of consumer financial products or services. CFPB provides financial education tools and other financial resources to practitioners.

- **Financial Education and Coaching Program by the Pennsylvania Housing Finance Agency (PHFA)** – This program was developed to help renters, homebuyers, and homeowners understand and improve their personal finances. Visit the website for the PHFA Financial Education and Coaching Program and locate a counseling agency in your area.

- **Money Smart by the Federal Deposit Insurance Corporation (FDIC)** – Money Smart is a comprehensive financial education curriculum designed to help low- and moderate-income individuals outside the financial mainstream enhance their financial skills and create positive banking relationships.

- **Pennsylvania ABLE Savings Program (PA ABLE)** – The PA ABLE is a state program that gives individuals with qualifying disabilities a tax-advantaged way to save or invest without impacting their government benefits. PA ABLE is administered by the Pennsylvania Treasury Department.
11. **Working with the Supports Coordinator and service plan team to identify needed assistive technology (such as home security devices) or home accessibility adaptations, which are necessary to ensure the individual’s health and well-being.**

Discuss with the Supports Coordinator and the individual’s ISP team to determine the appropriateness of assistive technology, including independent living technology. It is important to be familiar with the waiver assistive technology service definition and the guidance available in the ISP Manual.

12. **Assistance with coordinating the move from a congregate living arrangement or from a family home to a more independent setting; providing training on how to be a good tenant.**

Work cooperatively with the current residential setting provider, the property manager, and/or the family to select a timeframe for move in. Working within that timeframe, complete the appropriate transition steps identified in the Housing Support Plan, such as financial education, applying for financial assistance, acquiring furnishings, training on how to be a good tenant, etc.

13. **Working collaboratively with other service providers and unpaid supports.**

Work with the other service provider(s) and unpaid supporters to define roles and responsibilities related to the individual’s move. This includes how the other service providers/unpaid supporters are integral to transitioning and helping the individual maintain independent living.

14. **Assistance 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’s month rent, or any other costs associated with the transition.

Using the budget in the Housing Support Plan, determine what funds are needed to secure household furnishings and supplies (food, cleaning supplies, etc.), utility assistance, security deposits, first month’s rent. Determine if any local, state or federal financial resources are available to help pay for these items. Assist the client in securing those resources or finding alternatives. Contact the Local Referral Network or Regional Housing Coordinator to help determine the availability of these resources.

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. These tenancy support services include the following activities to be completed by the provider:

1. **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.

2. **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.

3. **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.

4. **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.

5. **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. Assist in skill development/restoration of natural/community networks of support.
6. **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.

7. **Coordinating 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.**

   As an individual’s skills and needs evolve, review the Housing Support and Crisis plan with the individual and update the plan as needed. When reviewing, consider disputes or issues that may have arisen and the strategies utilized 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 Housing Support Plan.

8. **Continuing training in being a good tenant and lease compliance, including ongoing support with activities related to household management.**

   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.