Transferring a Client to Another Program

<u>Program participants should only be transferred from one subrecipient program to another as a last resort, and all transfers must be approved by the Office of Supportive Housing (OSH).</u> OSH will not approve subrecipient transfers until it is confirmed that the transferring client has met all the eligibility requirements of the program it is transferring to.

In the event that a program participant will be transferred from one program to another, the following process is meant to ensure that all steps are taken in order for the participant to seamlessly transition without interruption of services. All efforts will be made by OSH to include an overlapping transition period between the two service providers to troubleshoot any issues that may arise during the process.

**Please refer to pg 36 of the Quality Assurance Standards (QAS) for further information on transfer procedures between programs.

<table>
<tr><th>Who is Responsible?</th><th>Roles and Responsibilities</th></tr>
<tr><td>Program <u>from which</u> the client is transferring</td><td>

Notify participant of the change in service provider
Obtain participant’s consent to provide information to new service provider
Confirm that participant retains their original homeless status from the time they entered PH
Check for any additional eligibility requirements from the receiving program and verify eligibility
Confirm that all required eligibility documentation is on file and compliant
Provide new program with participant information including:

HMIS identification number
Landlord information
Program rent amount
Client anticipated last month of subsidy

Provide program participant files

Ensure all required documentation is on file and is compliant with Chapter 29 of the CPD Monitoring Handbook
Document anything that is missing or deficient and address these issues

Provide any additional documents or information identified as needed
Inform landlords of new program points of contact
Provide a warm handoff of client to new case management team
</td></tr>
<tr><td>Program <u>to which</u> the client is transferring</td><td>

Review all participant files
Ensure all required documentation is on file and compliant, document anything that is missing or deficient
Reconcile with rent spreadsheet to ensure all information matches
Confirm payments can begin at transition start period without any issues
Complete program entry in HMIS
</td></tr>
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