INSTRUCTOR'S GUIDE

TO USING HPRP CASE SCENARIO TRAINING

> **About this Tool**
>
> The standards for determining and documenting household eligibility for assistance under the Homelessness Prevention and Rapid Housing Program are described in ***HPRP Eligibility and Documentation Guidance***, located on hudhre.info. The following Instructor's Guide and Case Scenario materials can be used to offer staff training and practice in applying the standards to a variety of household situations. The materials can be printed and used for either self-study or group training workshops.

HPRP Case Scenario Training is a tool to increase staff accuracy in determining household eligibility for HPRP assistance and maintaining case file documentation. The training uses hypothetical applicants for HPRP Prevention or Rapid Re-Housing assistance. Staff may then use a variety of HUD resources, including the Notice, Website tools and the Frequently Asked Questions (FAQs) to:

- o List documentation needed to assess each household's eligibility,

- o Answer the 3 key eligibility questions for each scenario, and

- o List other considerations and documentation appropriate to the household's specific situation.

HPRP Case Scenario Training can be used:

1. As a self-study program for a new HPRP staff or for a staff member whose performance needs improvement;

2. To provide more in-depth or refresher training for a group of staff within one or more agencies;

3. To test staff knowledge or as a pre-training baseline against which to measure changes in staff accuracy.

For NEW staff:

Staff should receive an initial orientation to the program philosophy and requirements prior to Case Scenario Training. The following are good Web-based resources for this initial training/orientation, found at: www.hudhre.info -->Homeless Prevention and Rapid Re-Housing (HPRP)→HUD-Issued Guidance→(name)Webinar. Staff should view at least one of these 1.5 hour Webinars before this self-study.

- ✓ HPRP 101 Webinar (minimum)

✓ HPRP Beyond the Basics Webinar

✓ Determining and Documenting HPRP Participant Eligibility Webinar

For staff with HPRP experience/training:

Staff can use the materials as a self-training module, with or without a pre-test. The materials can also be used for large group training. Large group training should allow the formation of subgroups/teams of 5-10 staff each. Each team can be given several case scenarios; the goal is to have at least two teams working on each case.

Instructions for Staff Self-Study

Purpose:

This exercise will help you accurately apply HUD requirements to individual case situations in order to determine eligibility. It will also help you to gather all the needed documentation for the case file. Many of the problems (non-compliance issues, or "findings") identified in HUD monitoring visits are related to lack of documentation in case files. The practice you will gain from working on these case scenarios will help ensure that clients receive the assistance they qualify to receive, and will reduce the possibility of your case files failing to pass monitoring review. Perhaps most important, you will know how to search for HUD-Guidance on future questions about eligibility determination.

Materials:

- ✓ **A computer with Internet access to HUDHRE.INFO**

    <Note: if computer and Internet access is not available, you may use printed copies of the HUD Notice, HPRP Eligibility Determination and Documentation Guidance, and an up-to-date printout of Frequently Asked Questions. All can be downloaded from HUDHRE.INFO.>

- ✓ **Case Scenario Worksheet(s), online or printed**
- ✓ **Pens or pencils if using printed copies of the worksheets**

If you have some experience with HPRP and your agency (or you) wants to use a pre-test to measure how much you have learned:

First take 20 minutes to answer the questions on the worksheets, using only what you already know about eligibility and documentation. Then, after you have finished the training, you can compare your final answers to the earlier ones, as a way to see how much you have learned.

If you are new to HPRP, please complete your initial training before beginning the Case Scenario Training.

There are good overviews at www.hudhre.info. Select HPRP→HUD-Issued Guidance→name of Webinar.   You should plan to review the HPRP 101 Webinar at a minimum (simply viewing the Webinar slides is not recommended).

- ✓ HPRP 101 Webinar
- ✓ HPRP Beyond the Basics Webinar
- ✓ Determining and Documenting HPRP Participant Eligibility Webinar

Case Scenario Training

You will see a series of descriptions of households who have applied for HPRP assistance. For each case, you will have to find answers to questions about household eligibility and documentation. Use the HUD resources (online and/or printed) to answer the questions. Answers may be found in different documents.

HUD periodically issues new guidance and/or tools; this Case Scenario Training is intended to help you practice accessing up-to-date information, not just memorizing lists of requirements. Knowing how to look up the correct answer is a much more valuable skill!

You have as much time as your agency allows to complete these exercises. When you are finished, you can review the case scenarios with the answers document. Note: If your agency is using the initial worksheet as a pre-test, you may be asked to hand in your worksheet before receiving the answers.

If you are reviewing and correcting your own worksheet, compare your answers to the handout. Make a checkmark by your correct answers.

How did you do? Did some of the answers surprise you? You can look for source material for those answers that you answered incorrectly. Search the HUD resources and make notes to help you with future cases. Stay up-to-date with new Technical Assistance tools and new Frequently Asked Questions.

Instructions for Large Group Staff Training

NOTE TO INSTRUCTOR: If staff are new to HPRP, they should first complete initial training before completing Case Scenario Training.

There are good overviews at www.hudhre.info. Select HPRP→HUD-Issued Guidance→name of Webinar. You should plan to review the HPRP 101 Webinar at a minimum (simply viewing the Webinar slides is not recommended).

- ✓ HPRP 101 Webinar

- ✓ HPRP Beyond the Basics Webinar

- ✓ Determining and Documenting HPRP Participant Eligibility Webinar

INSTRUCTOR PREPARATION

Teams:

Training participants should be divided into teams. The number of teams will be determined by the room and availability of training materials, but it is best to have groups of 5-10. It is also useful if each group has access to research tools. For example, if the training room has three laptop computers, staff may be divided into three teams. If six sets of materials are available, a maximum of six teams could be formed. Any combination of laptops and printed documents is fine.

Materials:

- ✓ **A computer with Internet access to HUDHRE.INFO and/or printed copies of:**
    - o HUD Notice;
    - o HPRP Eligibility Determination and Documentation Guidance; and
    - o An up-to-date printout of Frequently Asked Questions.

    All can be downloaded from HUDHRE.INFO
- ✓ **Case Scenario Worksheet(s), online or printed, 1 per staff.**
- ✓ **Pens or pencils if using printed copies of the worksheets**

Print Case Scenarios:

There are 11 Scenarios. Each team should be given 1-2 Scenarios, depending upon time constraints. Each Scenario can be printed, back-to-back, on one page.

AT THE WORKSHOP

I. Instructions to the Group: Purpose

This exercise will help you accurately apply HUD requirements to individual case situations in order to determine eligibility. It will also help you to gather all the needed documentation for the case file. Many of the problems (non-compliance issues, or "findings") identified in HUD monitoring visits are related to lack of documentation in case files. The practice you will gain from working on these case scenarios will help ensure that clients receive the assistance they qualify to receive, and will reduce the possibility of your case files failing to pass monitoring review. Perhaps most important, you will know how to search for HUD-Guidance on future questions about eligibility determination.

It will also help you include all the documentation needed in a case file. Many of the findings (non-compliance issues) discovered during HUD monitoring visits are related to lack of documentation in case files. The practice you gain from working on these case scenarios will help assure that clients receive the assistance they qualify to receive and will help assure that your case files pass HUD monitoring. Perhaps most important, you will know how to search for HUD-Guidance for future questions about eligibility determination.

II. Instructions to the Group: If including a pre-test of baseline staff knowledge

First each of you will take 15 minutes to answer the questions on the worksheets, using only what you already know about eligibility and documentation. Then, after you have finished the training, you can compare your final answers to the earlier ones, to see how much you have learned.

III. Assign the cases:

Hand out the Case Scenario Worksheets.

IV. Instructions to the Group: Case Scenario Training

You will read a series of descriptions of households who have applied for HPRP assistance. For each case, you will have to find answers to questions about household eligibility and documentation. Use the HUD resources (online and/or printed) to answer the questions. Even if you think you know the answer, please check/verify, using the resources. Answers may be found in different documents. HUD periodically issues new guidance and/or tools; Case Scenario Training is intended to help you practice accessing

information, not just memorize lists of requirements. Knowing how to looking up the correct answer is a much more important skill!

You can divide the research part—have one or two people look through the Notice, others scan the Frequently Asked Questions, etc. Whoever finds the answer first can shout it out.

Where you do find a source, make a note of the document and page number in the shaded column. That will be useful to defend your answers, and may save you research time in the future.

You have ___ minutes to work <allow about 15 minutes per scenario assigned to the group>.

IV. Instructions to the Group: Comparing Answers

Let's compare our eligibility decisions, starting with Prevention.

Which group had Mr. Martinez? Read the case aloud and then go through the questions and your answers.

<*If there are answers that are incorrect*…>

> What is your source for that answer? Would any of the rest of you like to suggest another answer?

<*If the instructor has access to a laptop overhead projector with Internet connection, s/he could display the correct answer—or the HUD source for that answer. Or the instructor can ask the group to look up the source after the workshop, as additional training. The correct answers will be handed out.*>

<*Continue on, case by case, allowing about 5 minutes per case for discussion.*>

< *If there's not enough time to discuss each case… >* We're going to stop now. You will each get a copy of all the Scenarios and the correct answers.

<*If the worksheet was used as a pre-test…*> How confident did you feel about your answers when you took the test the first time? How did you do, on your own, and how well did your group do once they had access to the source materials?

<If no pre-test…> How well did your group do? How hard was it to find the answers? What do you think you might do differently next time you are looking at your own real-life client case scenario?

<Pass out the Case Scenarios with Answers document> Now you have the answers to all the Scenarios, not just the ones your group was assigned. Use the HUD resources and these training resources as you continue to prevent homelessness and rapidly re-house households experiencing homelessness.