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Field Operations Memo 2007-11
March 30, 2007

To: Transitional Assistance Office Staff

From:  John Augeri, Assistant Commissioner for Field Operations

Re: Temporary Emergency Shelter Placement – 20-Mile Rule Tracking Procedures

Background

An EA family needing temporary emergency shelter must be placed within 20 miles of their “home community” unless they request otherwise or such shelter is unavailable or inappropriate. When a temporary emergency shelter is not available within the 20-mile limit, temporary emergency shelter will be provided in another Department-approved temporary emergency shelter as an interim measure. The Department will make all efforts to transfer the EA family to a shelter within the 20-mile limit at the earliest possible time unless the EA family requests otherwise.

Purpose of Memo

This memo obsoletes Field Operations Memo 2005-35 and notifies TAO staff about:

- the process for tracking shelter placements beyond the 20-mile limit by utilization of an Excel spreadsheet; and
 - roles and responsibilities, including:
 - the Housing and Homeless Services (H&HS) Centralized Placement Unit’s (CPU) role in notifying the EA family whose shelter placement is beyond the 20-mile limit of available shelter placement within 20 miles of their home community and notifying the TAO of the EA family’s decision to accept or decline the transfer;
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Purpose of Memo (continued)

- the TAO Homeless Coordinator, AU Manager and TAO Director or designee's responsibilities; and
- the revised *Declination of Transfer* form (Attachment A).

This memo also emphasizes the importance of the TAO's role in annotating changes on the spreadsheet with information about EA families who must be considered for a transfer to another shelter that is within 20 miles of their home community.

Active EA AUs – Beyond 20 Mile Placements Excel Spreadsheet

The *Active EA AUs – Beyond 20 Mile Placements* Excel spreadsheet is used to report EA families who are placed beyond the 20-mile limit. The following instructions clarify which EA families should or should not be listed on the spreadsheet. On a monthly basis, the latest update of this spreadsheet is emailed by Julie Noble to TAO Directors or designee for review. As part of the review, it is the TAO Director or designee's responsibility to ensure that the data in BEACON accurately reflects the case circumstances. Any corrections must be annotated on the spreadsheet – e.g., Shelter Name, Shelter Entry Date, Shelter Exit Date, or Does not need to be relocated.

The information from the *Active EA AUs – Beyond 20 Mile Placements* Excel spreadsheet is used for tracking and planning purposes, and for ensuring DTA's compliance with the EA regulation on shelter placements. No changes have been made to this spreadsheet.

EA family names identified on the spreadsheet

The spreadsheet will list the name of an EA family who has been placed in a shelter beyond 20 miles of their home community, **excluding**:

- families placed in Substance Abuse or Domestic Violence shelters; and
- families placed beyond the 20 miles who can not return to their home community because of domestic violence issues or other safety issues.

Note: For EA families added to the spreadsheet, any issues that could affect the transfer placement of the EA family must be annotated on the spreadsheet so that problems do not arise when CPU attempts to relocate the EA family. For example, the EA family's special needs child is receiving services in a particular area or the EA family can not be placed in a particular town (one other than its home community).

**Active EA AUs –
Beyond 20 Mile
Placements
Excel
Spreadsheet
(continued)**

Removing EA family names from the spreadsheet

The TAO Director or designee annotates the spreadsheet to note the name of an EA family that should be removed from the spreadsheet when the EA family:

- has been transferred to a shelter that is within 20 miles of their home community. Enter the exit date in the “Shelter Exit Date” field;
 - has been transferred to a Substance Abuse or Domestic Violence shelter. Enter the exit date in the “Shelter Exit Date” field;
 - can not return to their home community at this time because of domestic violence issues or other safety issues that developed or were discovered subsequent to the placement. Place an “X” in the “Does not need to be relocated” field;
 - no longer wants to return to their home community. Place an “X” in the “Does not need to be relocated” field; or
 - EA shelter benefits for the EA family have been terminated. Enter the exit date in the “Shelter Exit Date” field and indicate the date the EA AU was terminated.
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Active EA AUs – Beyond 20 Mile Placements Excel Spreadsheet (continued) **Annotating EA family’s declination of transfer on the spreadsheet**

The CPU will fax the *Declination of Transfer* form (Attachment A) to the Homeless Coordinator or AU Manager when the EA family residing in a shelter beyond 20 miles of their home community has declined an offer for transfer and therefore, must be removed from the spreadsheet. The Homeless Coordinator or AU Manager must forward this information to the TAO Director or designee.

The TAO Director or designee annotates the spreadsheet to note the name of an EA family that has declined the transfer by:

- placing an “X” in the “Does not need to be relocated” field if the EA family has decided that they do not want to be transferred to a shelter within 20 miles of their home community; or
- clicking in the “Preference” cell under the “TAO Priority” field if the EA family has declined the transfer because of existing extenuating circumstances, clicking the dropdown arrow, and selecting “Extenuating Circumstances.” Enter the date the extenuating circumstances are expected to end or be resolved in the cell under the “Future Transfer Date” field on the Excel spreadsheet.

Refer to *H&HS Centralized Placement Unit (CPU) and Homeless Coordinator or AU Manager Responsibilities* on page 6 of this memo for further instructions on how the EA family is notified of an available shelter placement within 20 miles of their home community and what is meant by “extenuating circumstances.”

The *Active EA AUs – Beyond 20 Mile Placements* Excel spreadsheet updated at the TAO is emailed to Julie Noble by the fifth working day of each month. Throughout the month, CPU will inform Julie Noble by email of any additional EA families placed beyond 20 miles of their home communities. The master spreadsheet will be updated with all of the information submitted from CPU and the TAOs.

Report Fields

The *Active EA AUs – Beyond 20 Mile Placements* Excel spreadsheet lists the following:

- New Addition by H&HS
- TAO
- AUM First
- AUM Last
- AU First Name
- AU Last Name
- AU SSN
- Shelter Name
- Shelter Entry Date
- Shelter Exit Date
- Beyond 20 Miles
- Originating TAO
- Placement Date
- HH Size
- Household Composition
- Special Circumstances
- Shelter Restrictions
- TAO Priority
- Future Transfer Date
- Change in information Yes or No
- Does not need to be relocated

For explanations of these fields, please refer to the attached Q&A sheet (Attachment B).

**H&HS
Centralized
Placement Unit
(CPU) and
Homeless
Coordinator or
AU Manager
Responsibilities**

Central Office Field Operations provides a copy of the reporting spreadsheet to CPU to facilitate the process of relocating each EA family to within 20 miles of their home community. CPU then reviews the spreadsheet to identify appropriate shelter vacancies for EA families who wish to be transferred to a shelter within 20 miles of their home communities. CPU selects the EA family to be transferred based on the priority listing that the TAO indicated on the spreadsheet. A priority of “critical” will be considered first, and all factors being equal, the oldest shelter entry date will be considered first.

Important: If the EA family has any questions about the family’s standing on the *Active EA AUs – Beyond 20 Mile Placements* Excel spreadsheet or the status of any other transfer, the Homeless Coordinator or AU Manager and not the EA family is responsible for contacting the CPU for updated information.

If an appropriate placement is found based on the family composition and size, CPU will contact the EA family directly at the shelter to advise the EA family of the opportunity of placement within 20 miles of their home community.

If the EA family accepts the shelter transfer:

- CPU will email the shelter transfer information to the Homeless Coordinator or AU Manager and the new shelter;
- the Homeless Coordinator or AU Manager must:
 - . print and file the email in the AU record;
 - . follow the established transfer procedures, as described on pages VI-2 to VI-3 of the *EA User’s Guide, Follow-up on Temporary Emergency Shelter*;
 - . update the Self- Sufficiency Plan with any relevant changes; and
 - . notify the TAO Director or designee about the transfer; and
- TAO Director or designee will record the transfer information on the TAO’s copy of the spreadsheet.

**H&HS
Centralized
Placement Unit
(CPU) and
Homeless
Coordinator or
AU Manager
Responsibilities
(continued)**

If the EA family declines the shelter transfer, CPU will:

- explain that declining the shelter transfer will remove the EA family from further consideration for transfer to a shelter within 20 miles of the home community;
- send an email to the Homeless Coordinator or AU Manager alerting him or her about the EA family's decision to decline the transfer;
- fill out the *Declination of Transfer* form identifying the EA family name and SSN, the Other Adult name and SSN, and the EA family's current shelter placement and address;
- fax the *Declination of Transfer* form to the EA family at the EA family's current shelter placement. The EA family and the Shelter Director or designee must sign the form. The Shelter Director or designee will give a copy of the signed form to the EA family and fax the form to CPU; and
- fax the signed *Declination of Transfer* form to the Homeless Coordinator or AU Manager. The Homeless Coordinator or AU Manager must:
 - . file the faxed *Declination of Transfer* form in the AU record;
 - . annotate the declination in the BEACON Narratives tab;
 - . update the Self-Sufficiency Plan with any relevant changes; and
 - . notify the TAO Director or designee about the declination.

The TAO Director or designee will record the declination information on the TAO's copy of the spreadsheet.

If the EA family does not return the signed *Declination of Transfer* form to CPU within two days CPU will annotate the *Declination of Transfer* form that the EA family had verbally declined the transfer but did not return the signed form. The form is faxed to the Homeless Coordinator or AU Manager who must:

- file the annotated *Declination of Transfer* form in the AU record;
- record the declination in the BEACON Narratives tab;
- update the Self-Sufficiency Plan with any relevant changes; and
- notify the TAO Director or designee of the declination.

The TAO Director or designee will record the declination information on the TAO's copy of the spreadsheet.

**H&HS
Centralized
Placement Unit
(CPU) and
Homeless
Coordinator or
AU Manager
Responsibilities
(continued)**

If the EA family is requesting a temporary hold on the transfer because of extenuating circumstances (education, employment, and/or medical issues) but they still want to be transferred to a shelter within 20 miles of their home community sometime in the near future, CPU will:

- accept this information and record the future transfer date, as stated by the EA family, on CPU's copy of the spreadsheet. Verification of "extenuating circumstances" is not required; and
- email this information to the Homeless Coordinator or AU Manager.

The Homeless Coordinator or AU Manager must:

- print and file the email in the AU record;
- annotate the EA family's temporary hold on the transfer in the BEACON Narratives tab;
- update the Self-Sufficiency Plan with any relevant changes; and
- notify the TAO Director or designee of the EA family's temporary hold on the transfer.

The TAO Director or designee will record the extenuating circumstances and future transfer date on the TAO's copy of the spreadsheet.

Obsolete

FO Memo 2005-35 is now obsolete.

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline at 617-348-8478.



Declination of Transfer

Date _____

Recipient Name _____ SSN _____

Other Adult Name _____ SSN _____

Please read the following statement about not accepting the shelter placement transfer that was offered to your family. After reading the statement, you and the Shelter Director must sign the form, and fax it back to the H&HS Centralized Placement Unit at 617-348-5355.

I do not want to accept the Department of Transitional Assistance's offer to transfer my Emergency Assistance shelter placement from _____.

I do not want to accept this transfer because I want my family to remain in its present location.

I understand that because I have declined this transfer, the Department will stop its efforts to place my family in a temporary emergency shelter within 20 miles of our home community.

Recipient Signature _____ Date _____

Shelter Address _____

City _____

Shelter Director/ Designee Signature _____ Date _____

Comments:

Q&A

Q1. Do I need to set a priority for every case?

A1. Yes, a case priority level needs to be established for every family that is still in shelter beyond 20 miles and who wishes to return.

Q2. How do I indicate the priority for each case? What do I enter in the “TAO Priority” field?

A2. This field contains a drop-down box from which to choose a priority (“Critical,” “Preference,” or “Extenuating Circumstances”). TAOs should use this field to identify whether the family situation represents a critical need to be relocated to their home community, that the need is not critical but the family prefers to be relocated, or that the family prefers to be relocated but cannot because of extenuating circumstances.

Q3. What do I enter onto the spreadsheet if the family is granted a temporary hold on the transfer because of acceptable extenuating circumstances?

A3. Select “Extenuating Circumstances” from the “TAO Priority” drop-down field and enter a date in the “Future Transfer Date” field. This date should be the date, as stated by the family, when the family’s extenuating circumstances are expected to be resolved. When the extenuating circumstances no longer prevent the family from being transferred to a shelter within 20 miles of their home community, the priority should be changed to either “Critical” or “Preference,” depending on the case circumstances, and the date in the “Future Transfer Date” field must be removed, as well.

Q4. Do I need to report back to Central Office if there are not any changes to these cases?

A4. Yes, TAOs are required to report on every case listed on the report and must indicate with a Yes or No in the field titled “Change in Information Yes or No” if there was a change from the last month’s report.

Q5. How do I indicate that the family does not want to be relocated to their home community?

A5. Place an “X” in the field titled “Does not need to be relocated.”

Q6. What type of information do I put in the field titled “Shelter Restrictions”?

A6. Use this field to indicate the type of shelter/facility that the family needs, such as handicapped accessible.

Q7. The case is no longer in my TAO, what do I enter on the report?

A7. All fields still must be completed. If the case has been transferred, you must also change the information in the first field, entitled “TAO,” to reflect the TAO # where the case now resides. The case will then appear on the list the following month at the TAO where the case is assigned.

Q8. What do I enter on the report if it is discovered that the calculation of 20 miles was incorrect and the family was not really placed beyond 20 miles of their home community?

A8. In the “Beyond 20 Miles” field change the ‘Y’ to an ‘N’.

Q9. How do I easily find the cases for my TAO or that are residing in a shelter in my TAO coverage area?

A9. At the top of the report, there are drop-down arrows for every field. You can use these drop-down areas to select your specific TAO in the “TAO” field or you can select a specific shelter in the “Shelter Name” field.

Q10. What do I do when I see an entry in the “New Addition by H&HS” field?

A10. Complete and/or update all fields, being sure to follow all instructions in this Field Operations Memo.