



2024 Recovery Voucher Grant

All Grantee Training

Presented: Jan 18, 2024




Goals

- Provide an Overview
- Share Best Practices
- Answer Questions



Cautions

- This presentation is not comprehensive.
- Grantees will still need to read:
 - **Program Manual**
 - Tip: Read the whole thing at least once, the Step-by-Step Client Flow and Paperwork Timing Guide section for a refresher, and the policies section for a list of all recovery residence policies.
 - **Contract**
 - Tip: Review the Attachments (G & F especially).
- DEHCR will monitor based on what is in the Program Manual and the Contract.



Recovery Voucher Grant Program
Helping people diagnosed with or receiving treatment for opioid use disorder find safe interim housing for themselves and their families.

Program Manual

Grant Year 2024

State of Wisconsin
Department of Administration
Division of Energy, Housing and Community Resources

Provides program rules and guidance for the Recovery Voucher Grant Program

Last Revised December 2023



Agenda

- Introductions
- Program Background & Current Status
- Opioid Use in WI
- Main Roles & Responsibilities
- Client Eligibility
- Recovery Residences
- Best Practices
- Types of Costs
- Client Files & Data
- Payment Requests
- Monitoring
- Resources
- Questions



Introductions



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HMIS System
Administrator (ICA)



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Program Background & Current Status

Opioid Distributors & Manufacturers



- WI reached a settlement with opioid distributors/manufacturers and will receive over \$400 million; Department of Health Services (DHS) received an allocation*

- Recognizing safe and stable housing is fundamental to recovery, DHS decided to create the Recovery Voucher (RV) Grant Program

Goal: House people who have been diagnosed with an opioid use disorder (OUD) or are receiving treatment, and are currently experiencing homelessness, at imminent risk, or fleeing domestic violence.

Department of Health Services (DHS)

- DHS is partnering with the Department of Administration, Division of Energy, Housing, and Community Resources (DEHCR) to administer this grant given DEHCR's expertise in housing programs and existing relationships with homeless service providers.

Department of Administration (DOA)

Division of Energy, Housing & Community Resources (DEHCR)

- This is the second year of the RV program. In its first year, the program served over 160 individuals.
- The program will run through 2025 (if not longer) and will be awarded through a competitive application process.

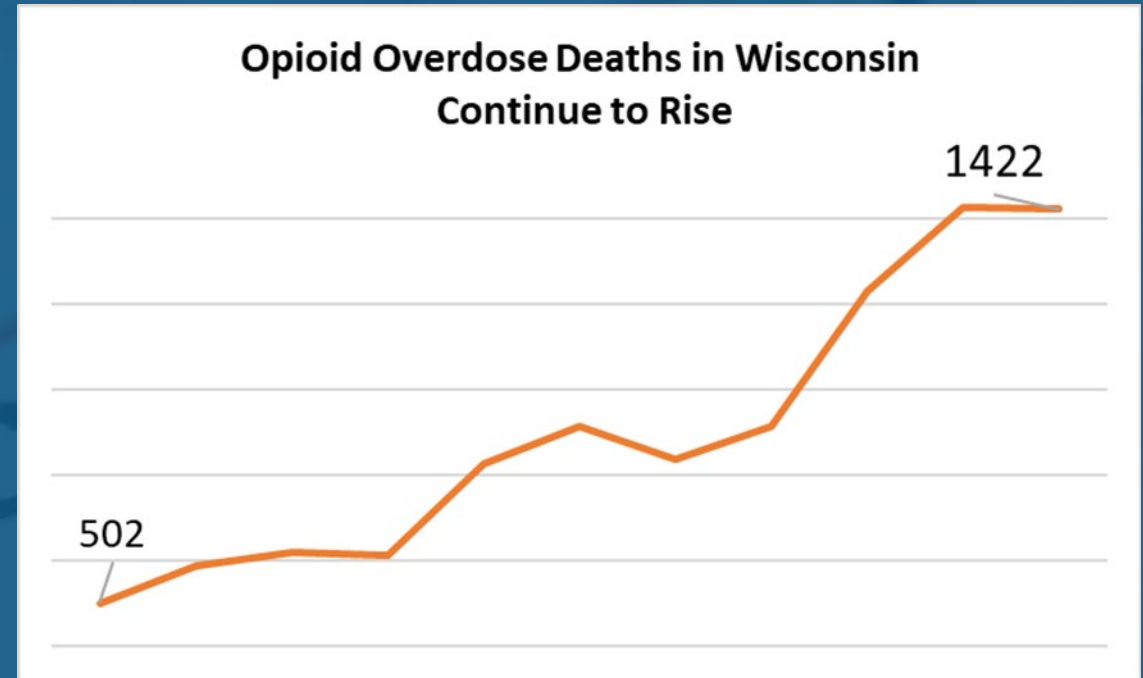


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*Source: [Dose of Reality: Opioid Settlement Funds](#) | Wisconsin Department of Health Services

Opioid Use in Wisconsin

- Opioid use continues to negatively impact Wisconsinites:
 - In 2022, Wisconsin lost 1,422 people to an opioid-related overdose.
 - In 2022, there were 2,530 emergency room hospitalizations and 978 inpatient hospitalizations for opioid overdoses.
 - Opioid overdose **deaths** have **increased** almost **3x** in the last 10 years.



Fentanyl

- On August 17, 2022, the Department of Health Services (DHS) issued a Public Health Advisory in response to an increase in the number of deaths caused by drugs laced with fentanyl.
 - Fentanyl was identified in 73% of all drug overdose deaths, and 91% of opioid overdose deaths.*
 - It is incredibly dangerous because of its potency, and because it is impossible to detect through smell or appearance (testing is required).

HELPFUL RESOURCES

Fentanyl test strips are legal in WI. Call the Wisconsin Addiction Recovery Helpline to learn where to get free test strips or other resources.

Call 211 or 833-944-4673 Or Text your ZIP code to 898211

Narcan® is available without a prescription at hundreds of pharmacies and other retail locations.

Available for free from many locations. Check out the map at: [DHS Opioids - Safer Use](#).

Find more information on the above, plus much more at: [DHS's Dose of Reality Website](#).



Main Roles & Responsibilities

RV Administrators (RV Admins)	Recovery Residences	RV HMIS Lead Agency (ICA)
<ul style="list-style-type: none">• Accept client referrals.• Enter clients into the RV program.• Work with clients to find placements in recovery residences.• Gather and enter client data into HMIS.• Pay recovery residences for RV client stays.• Publicize the program within their service territory (Continuum of Care (CoC) or Local Homeless Coalition (LHC)).	<ul style="list-style-type: none">• House clients in the RV program.• Perform exit interviews with clients. <p>*Not required but can be a referral source and can help gather intake paperwork.</p>	<ul style="list-style-type: none">• Provide technical assistance for HMIS.• Pull monthly, annual, and ad hoc reporting.

Simplified Client Flow

1. The RV Admin performs an intake to check for eligibility.

Next steps are for eligible clients only.

2. The RV Admin enters the client into the RV program in HMIS and completes the necessary paperwork.
3. The RV Admin works with the client to find a recovery residence placement.
4. Once a placement is identified, the RV Admin checks to ensure it meets program guidelines.
5. If it does, the RV Admin enters into an agreement with the recovery residence (Stay Agreement) and completes the necessary paperwork.
6. The client moves into the recovery residence and the RV Admin records the client's recovery residence entry date in HMIS. RV Admin sends monthly payments to the recovery residence.
7. At the end of the client's stay, the recovery residence performs an exit interview with the client and shares the information with the RV Admin. The RV Admin enters this data into HMIS.

The Step-by-Step Client Flow and Paperwork Timing Guide

Provides full details and can be found in the [Program Manual](#).



Client Eligibility – Types of Clients

- Starting in 2024, individuals and their families are eligible to be supported by the RV program.

Single Clients

- Individuals who qualify for the RV program (primary RV program eligibility) who do not have accompanying family members staying with them.

Family Clients

- Individuals who qualify for the RV program who have accompany family members staying with them.
- Three family client sub-types:
 - **Main Client:** Individuals with primary RV program eligibility.
 - **Other Adults:** Individuals 18 or older, and eligible through the Main Client.
 - **Children:** Individuals under 18, and eligible through the Main Client.

Client Eligibility – Primary Requirements

- To be eligible for the RV program, the client must meet the RV program primary eligibility requirements on their **day of entry** into the RV program:

Opioid Use Disorder (OUD) Eligibility

- Documentation of an opioid use disorder (OUD) diagnosis or having received OUD treatment in the past 12 months.

Homelessness Eligibility

- Documentation of HUD Homelessness eligibility for categories 1, 2, 3, or 4.

- For Family Clients, the Main Client will need to meet both the above requirements. Other family members will only need to meet the homelessness requirement, which they will automatically by being part of the Main Client's household.
- Tip: To avoid missing an eligibility opportunity, enter clients into the RV program as soon as they qualify and then look/continue looking for a recovery residence placement.



Client Eligibility - OUD

- To meet this requirement, the client will need to have documentation of either:

OUD Diagnosis
(Not Time Dependent)

or

OUD Treatment within
the Past 12 Months
(Time Dependent)

- Documentation can be provided in 4 ways, only 1 type of documentation is needed:

1. Signed note from a health or behavioral health provider (provider).

2. Record from a provider.

3. Claims statement that details OUD care/treatment was received.

4. Notes from a phone call with release of information from a provider signed by the RV Admin who made the call.*



*Requires signed consent from the potential client, if the potential client is not on the phone call.

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Client Eligibility - Homelessness

- Client must meet the requirements for HUD Homelessness Categories 1, 2, 3 or 4 on their **day of entry** into the program.
- Below is a HIGH-LEVEL overview of categories (don't use these to determine eligibility). Sample verification of homelessness forms and a full description of the categories and documentation requirements can be found on [DEHCR's RV website](#).

HUD Category 1 *Literally Homeless*

Definition: Living in shelter, or a place not meant for human habitation. Exiting an institution where they resided 90 days or less and the individual was living in shelter, or a place not meant for human habitation immediately before.

HUD Category 2 *Imminent Risk of Homelessness*

Definition: Individual will lose their housing within 14-days, no subsequent residence has been identified and lacks the resources/supports needed to find other permanent housing.

HUD Category 3 *Homeless Under Other Federal Statutes*

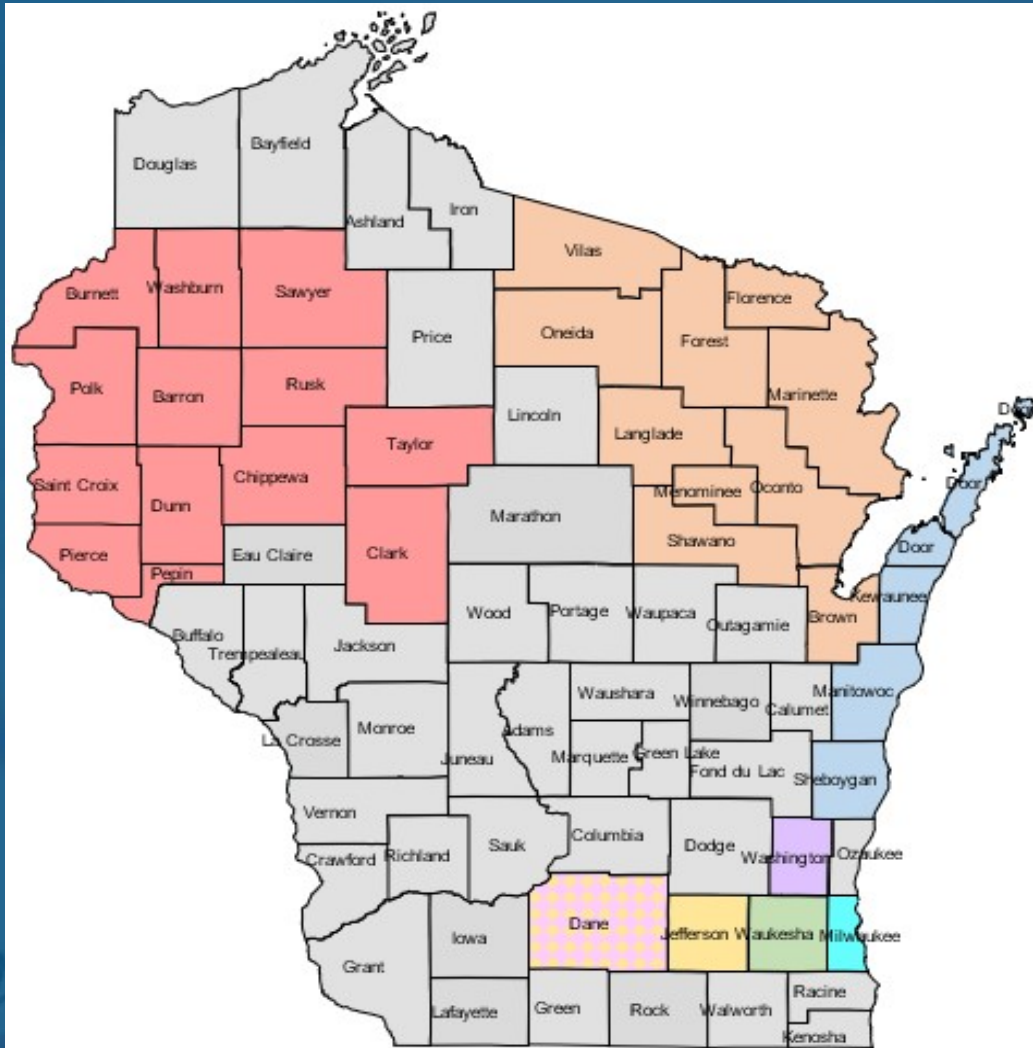
Definition: Unaccompanied youth (18-24), or families with children and youth, who don't qualify as homeless under categories 1, 2, or 4 but do under other federal statutes, and haven't had formal occupancy in permanent housing in the past 60 days, have moved two or more times in the past 60 days, and are expected to continue having unstable housing due to special needs or barriers.

HUD Category 4 *Fleeing/ Attempting to Flee Domestic Violence*

Definition: Individual is fleeing or attempting to flee domestic violence, has no other residence, and lacks resources/supports to find other permanent housing.



Client Eligibility - Location



- RV Admins are required to accept clients from anywhere in the state however, RV Admins are not required to place clients in recovery residences outside of their service territories.
- RV Admins can decide to place clients outside of their service territories, if that would be in the best interest of the client.

Service Areas:

- CAC (Yellow, Pink/Yellow Diamonds; until 6/30/24; not accepting new clients)
- Lakeshore CAP (Blue)
- Newcap (Orange)
- Salvation Army Graceplace (Red)
- Catalyst for Change (Pink/Yellow Diamonds)
- Community Advocates (Turquoise)
- Family Promise of Washington County (Purple; until 6/30/24; not accepting new clients)
- Hebron House (Green)



Contact information for Grantees can be found on [DEHCR's RV Website](#).

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Recovery Residences - Overview

- Definition “Home-like, residential environments that promote healthy recovery from a substance use disorder and support persons recovering from a substance use disorder through the use of peer recovery support.”



- Located throughout the State.



- Provide varying levels of care from peer-run low structure to service provider-run high levels of structure, often with clinical services in-house.



- Often don't have clients sign leases and use participation agreements instead.

- Allows them more flexibility to remove a client if they break residence rules.



- Have rules and guidelines that are separate and may conflict with RV program rules.
 - Examples: Limitation on age of family members they are willing to serve (teenage males), faith-based activities, or required activities.

Recovery Residences - Registry

- DHS maintains the Recovery Residence Registry (Registry) and the **specific recovery residence location** needs to be on the Registry to receive RV clients and funds.*
- To be on the Registry recovery residences need to apply.
 - The application consists of providing contact information and attesting the recovery residence will follow and maintain 7 standards (including: operating with integrity, upholding residents' rights, applying the social model form of recovery).**
- The Registry is updated monthly, and a copy of the Registry with the addresses of all the recovery residences will be shared quarterly.
 - The copy with addresses must be kept confidential and shared internally only with people who need it to administer the program.

Please encourage recovery residences to apply to the [Registry](#).

FAQ for Recovery Residences can be found on [DEHCR's RV website](#).



The screenshot shows the Wisconsin Department of Health Services website. The header includes the department name and a navigation menu with categories like 'About DHS', 'Data & Statistics', 'Diseases & Conditions', 'Health Care & Coverage', 'Long-Term Care & Support', 'Prevention & Healthy Living', 'Partners & Providers', and 'Certification, Licenses & Permits'. The main content area is titled 'Recovery Residence Registry Approval Process' and features a 'New Program Announcement!' box for the 'Recovery Housing Voucher Initiative'. Below this, there is a paragraph explaining the program's purpose and a link to a PDF announcement flyer. A section titled 'Recovery Residences are home-like, residential environments...' provides a definition and a link to Wisconsin Statute § 46.234. A list of expectations for approved residences is provided, and a small image of a house with a key is shown on the right.



*Recovery residences are not required to register to operate in Wisconsin, however if they want to receive Federal or State funds they are required to register. **DHS will investigate complaints and list them on the WI Provider Search, but DHS does not perform ongoing monitoring.

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Recovery Residences – Guidelines

To place a client in a recovery residence, their placement must conform to the following guidelines.

Selection

- RV Admins can place clients in any recovery residence provided:
 1. The specific location is listed on the Registry.
 2. It will follow all RV program guidelines.
 3. Will best meet the client's needs vs. alternatives.

Room Type

- For Single clients, a typical room contains two (2) beds, however RV Admins can approve different configurations on a case-by-case basis.
- Family clients can be housed in varying units given the range of factors impacting placement (size of family, age of members etc.). RV Admins will review units and approve them on a case-by-case basis.

Location

- Clients can be placed in any recovery residence across the state of WI so long as it is on the Registry. If it is outside of the RV Admins service territory, rationale must be provided.



Recovery Residences – Guidelines

Continued Guidelines

Rates

- Must conform to both rules:
 1. Best Rate: The rate provided to the program must be the same or lower than rates provided to clients not supported by the program.
 2. At or under the RV Max Rate: Under the RV Maximum Allowable Rate (RV Max Rate) for the applicable client type (single or family).

Payment Terms

- Payments, except for the security deposit, pro-rated first month's dues and second month's dues, must be paid monthly.
- Invoices must be collected and be kept in the clients' files.*

- For each client placement, a **Recovery Residence Program Compliance Documentation form** will need to be filled out and kept in the client's file showing the placement meets these guidelines.
- Recovery Residence Program Compliance Documentation templates (1 for single clients, and 1 for family clients) can be found on [DEHCR's RV website](#).



*Exception is if a lease has been signed with the recovery residence.

Recovery Residences – Stay Agreement

- Once a placement has been found, it is confirmed it meets all required guidelines, the RV Admin and the recovery residence need to sign a Stay Agreement **no later than the same day** the client moves in. The purpose is to ensure all parties are clear on:
 - Rates and payment terms.
 - Guidelines including what happens if a client is asked to leave, or if a client goes missing.
 - Requiring the client gets the policies and procedures, including the termination policy from the recovery residence.
 - Requiring the recovery residence to do an exit interview with the client (if the situation allows) and the sharing of data.
- Full Stay Agreement requirements, and a template can be found on DEHCR's RV website.



Sharing Best Practices



Jenn Hollingsworth

Case Manager
RV Administrator
(Hebron House)



Gabriel Christenson

Property Manager
(Hebron House)



Lyric Glynn

Supportive Housing
Program Director
(Lakeshore CAP)

- How does your organization get referrals or find potential clients?
- What has been the best way of finding appropriate placements for clients in recovery residences?
- What recommendations do you have on the best way to interact with recovery residences?
- What has been the most efficient way of documenting opioid use disorder?

Eligible Costs – Client Assistance Funds

Bed Cost

Will cover the cost of monthly dues for the cost of bed within a room including standard utilities such as heat, water, electricity, gas, internet and the basic operations for running the recovery residence (example: bookkeeping).

Does not include ancillary services such as but not limited to case management provided by the recovery residence, peer support groups, meals, or healthcare.

Rate Requirements

- 1. Best Rate:** The rate provided to the program must be the same or lower than rates provided to clients not supported by the program.
- 2. At or under the RV Max Rate:** Under the RV Maximum Allowable Rate (RV Max Rate) for the applicable client type (single or family). The RV Max Rate is based on the Fair Market Rates (FMR) for the recovery residence's location:
 - Efficiency FMR * 75% * 135% = RV Max Rate for Singles
 - Efficiency FMR * 135% = RV Max Rate for Families



Eligible Costs – Client Assistance Funds

Bed Cost

Will cover the cost of monthly dues for the cost of bed within a room including standard utilities such as heat, water, electricity, gas, internet and the basic operations for running the recovery residence (example: bookkeeping).

Does not include ancillary services such as but not limited to case management provided by the recovery residence, peer support groups, meals, or healthcare.

Timing & Payment Terms

- Clients can be supported in a recovery residence for 24 months or through the end of the performance period whichever is shorter.
- Payments must be made monthly except for the first month when the pro-rated first month, second month and security deposit can be paid together.
- If the client has moved into the recovery residence and then is a “no-show”, the client’s bed can be held for the client for 30 days while the client is searched for, if the recovery residence chooses to do so (not a requirement).
- If the client moves out within the first 15 days of the month (or billing period), half the monthly fee must be returned to the RV Admin.
- Clients are not allowed help pay for the types of costs covered by the RV program.



Eligible Costs – Client Assistance Funds

Security Deposit

If required by the recovery residence a security deposit (maximum twice the monthly dues) can be paid.

If the client has moved into the recovery residence, the security deposit must be returned to the client. If the client hasn't moved into the recovery residence or can't be reached the security deposit must be returned to the RV Admin.



Limited Transportation

Eligible costs are restricted to bringing the client to the recovery residence at the beginning of their stay and providing a return trip at the end of the client's tenure. Limited to 1% of the RV Admin's award (\$125K - \$1,250).

These funds will not cover moving costs, or transportation during the client's stay.



Eligible Costs – Case Management Funds

- These funds can be used for case managers and associated case management services needed to:
 - Place clients in recovery residences.
 - Keep them safely housed.
 - Help them find housing or another appropriate situation when their recovery residence stay ends.
- Eligible costs include case manager salaries, benefits, training (if specific to the RV program population) and costs directly tied to a case manager such as office space, and mileage.
 - Timesheets broken out by funding source and an allocation plan for any shared costs are required.
- Can be up to 20% of the award.



Eligible Costs – Administrative Funds

- These funds can pay for costs such as, but not limited to:
 - Office space
 - Computers
 - Office supplies
 - Salaries for agency-wide functions (example: accounting).
- If shared costs are billed an allocation plan will be required and/or timesheet broken out by funding source.
- Can be up to 10% of the award.



Ineligible Costs

Recovery Residence Specific

- Costs covering the last half of the month (billing period) if the client left in the first half.
- Ancillary costs including:
 - Case management provided by the recovery residence.
 - Support groups.
 - Transportation during the client's stay.
 - Meals.
 - Activity fees.

- Late fees.
- Arrears, back dues/ rent/ late or unpaid security deposits.

Other Costs

- Moving costs.
- Transportation during the client's stay.
- Expenses incurred outside of the performance period.

- Capital expenditures.
- Alcoholic beverages.
- Items that could be construed as entertaining, including social activities and tickets to movies, shows, sports events, or concerts, and any costs related to attending such events, whether or not admission is charged.



Client Files – Non-HMIS

- DEHCR put together a single client checklist and family client checklist to help ensure grant requirements are met. The checklists are on [DEHCR's RV website](#).
 - If an individual joins the RV program as a single client and then is joined by their family, the family paperwork will need to be completed.
- Templates for all documents referenced in the checklists are also on [DEHCR's RV website](#) including:
 - Sample verification of homelessness forms.
 - Documentation of provision of RV program termination policy, and the recovery residence's policies and procedures.
 - Recovery residence stay agreement.
 - Recovery residence program compliance documentation.
 - Client exit interview.
- All documents should be kept in the client's file.

Helpful Links, Resources & Tools

Information on the following topics can be found at the associated links listed below:

- [2024 RV Administrators Contact Information and Map](#).
- Frequently Asked Questions
 - RV Administrators' Frequently Asked Questions: [2024 RV Grant Administrator FAQs](#).
 - Recovery Residences' Frequently Asked Questions: [2024 RV Grant Recovery Residence FAQs](#).
- [2024 RV Grant Program Manual](#).
- HUD Fair Market Rates (FMR): [Fair Market Rents \(40th PERCENTILE RENTS\) | HUD USER](#).
- Forms
 - [Sample Verification of Homelessness Forms \(Balance of State CoC\)](#).
 - HUD definitions for category 1, 2, 3, and 4 homelessness and their associated documentation requirements for confirming eligibility: [At a Glance Criteria and Recordkeeping Requirements for Definition of Homeless \(hudexchange.info\)](#).
 - Single Client Forms
 - [2024 RV Client File Checklist_Single](#).
 - [2024 RV Recovery Residence Program Compliance Documentation_Single](#).
 - [2024 RV Recovery Residence Stay Agreement_Single](#).
 - [2024 RV Exit Interview_Single](#).
 - Family Client Forms
 - [2024 RV Client File Checklist_Family](#).
 - [2024 RV Recovery Residence Program Compliance Documentation_Family](#).
 - [2024 RV Recovery Residence Stay Agreement_Family](#).
 - [2024 RV Exit Interview_Family](#).
 - General Forms (for both Single and Family Clients)
 - [2024 RV Program Termination Policy - Client Receipt](#).
 - [2024 RV Recovery Residence Policies and Procedures - Client Receipt](#).
 - [2024 RV Client Stay Extension Form](#).
- Information on Opioids in Wisconsin: [Dose of Reality: Opioids in Wisconsin | Wisconsin Department of Health Services](#).
- Information on Recovery Residences & the DHS Registry:
 - Definition and description of DHS recognized recovery residences and information on how to apply to be on the DHS Registry: [DHS Recovery Residence Description & Registry Application](#).
 - DHS Recovery Residence Registry: [DHS Recovery Residence Registry](#).



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Client Files - HMIS

- There are 3 main times client data is collected for the RV program:
 - Entry
 - Exit
 - 1 year mark
- Different data will be collected depending on whether the person is a single/main client, other adult, or child.
 - Details can be found in the Program Manual.
- Recovery residences will be required to perform simple exit interviews (template on [DEHCR's RV website](#)) with all adults and share the information with the RV Admins (in Stay Agreement).

Key Data Points Collected

- Income and sources.
- Sociodemographic information.
- Participation in the RV Program:
 - Eligible homeless category.
 - RV program entry and exit dates.
 - Specific recovery residence stay information:
 - Entry and exit dates.
 - County
 - Reasons for exiting the RV program.
 - Substance use during the program.



Inputting Client Data - HMIS



Patrick Duffie, HMIS System Administrator from ICA, will train us on how to input data into the HMIS Client Data Module

Reporting



- Data has helped inform program decisions (example: changing the program to cover families) and will help support the case for continuing the program past 2025. **It's important.**
- ICA will be pulling reporting monthly on the 16th of the month.
- RV Admins must have their client data updated by the 15th of the month for the month prior. Staying current is highly preferred.
 - If data is missing from HMIS, DEHCR reserves the right to withhold payment.

Payment Requests

- Payment requests can be submitted monthly on or before the 15th of the month for the month prior.
- Final payments requests must be submitted on or before January 15, 2025 (fast close).
- Quarterly budget updates are required until all funds have been exhausted. Budget updates should include:
 1. When the RV Admin expects to submit the next payment request.
 2. RV Admin's expected future expenditures.
 3. As applicable, any concerns with spending the full award within the performance period.
- If HMIS is not up to date, DEHCR reserves the right to withhold payment.



Monitoring

- All RV Admins will be monitored at least once a year.
- Monitoring will either be in-person or a desk monitoring. Goals:
 1. Evaluate compliance with RV Program Manual and Contract.
 2. Correct non-compliance.
- Please review the Program Manual and Contract (especially the Attachments).
- At minimum DEHCR will review policies, 1 month of financials, and 3 or more client files.

Tips:

- RV program termination policy must be different than the recovery residence's termination policy. *Requirements are outlined in the Program Manual.*
- Confidential, Proprietary and Personally Identifiable Information policy requires DEHCR to be notified within 5 days if there is a disclosure of confidential information. *Requirements are outlined in the Program Manual.*
- Review the Step-by-Step Client Flow and Paperwork Timing Guide section in the *Program Manual* for a refresher.



Resources

- Information the DHS Recovery Residence Registry plus the application and the Registry itself is available on [DHS's website](#). Questions can be directed to DHS DQA, Behavioral Health Certification Section at: DHSDQAMentalHealthAODA@dhs.wisconsin.gov.
- [DEHCR's RV website](#) has the program manual, templates, contact information for RV Admins, FAQs for RV Admins, FAQs for recovery residences and much more.
- Your Contract (especially the Attachments).
- Please reach out.



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Questions?





Thank You

