

Warm Handoff Guide

What is a warm handoff?

A warm handoff is a transition conducted between two members of the support team providing homeless or housing services for a participant. While the Sending party is often someone from the homeless system (Outreach worker, Shelter staff, Navigator) connecting a participant to the housing system (Case Manager or Housing Specialist), the warm handoff process can also include exchanges within the housing system (Program to Program or Case Manager changes within an agency.) Regardless of the systems, there are 3 parties involved in a warm handoff:

- the sending party
- the participant
- the receiving party

All three parties have an active role to play in the warm handoff, including the participant. The planning, information sharing, and exchange should not be something that happens to the participant, it is something that happens *with* them.

Warm handoff Workflow

Once a participant has been matched to a particular program (or new Case Manager), the following workflow is recommended for an effective warm handoff.

Planning and Preparing

1. The sender ensures all HMIS documentation is up to date with consents, current proof of income, current interim updates, or other documents required by the receiving party.
 - a. **Some programs have varying documentation requirements and workflows, so flexibility on the part of the sender is important. (Example: referrals to single site programs must first complete and pass a leasing application before the Program staff can schedule the warm handoff. Senders are expected to help participant complete all steps of the leasing application process prior to scheduling the warm handoff with the Housing program.)*
2. The Sender is responsible for scheduling the warm handoff, in consultation with all parties.
3. With appropriate participant consents in place, the Sender shares all relevant information about the participant with the receiving party to help them plan for the time. Important items to brief the receiving party on:
 - a. Overview of work done with participant, including strengths, resources, goals, and potential barriers to housing
 - b. Medical, MH needs and supports currently established
 - c. Pets
 - d. Recommendation on time to be allotted for meeting(s).
 - e. Accommodations needed for meeting
4. Receiving party prepares questions and forms for meeting. (See Navigation Summary Form for guidance)
5. Sender prepares the participant for the meeting. Important items to brief the participant on:
 - a. Why the warm handoff is taking place: *We're going to meet together with your new Housing Case Manager so they can begin working with you on next steps with housing.*
 - b. When and where it will occur: *The meeting will take place at A-Location at noon. I'm going to pick you up at the 7/11 at 11:30am to drive you over.*
 - c. What happens during the meeting: *There's 3 main things we'll do during the meeting.*
 - i. **INTROS:** *I'll introduce everyone*
 - ii. **PARTICIPANT OVERVIEW:** *I'll give a brief overview of the work we've done together. Then you'll share what you see as your strengths and goals, like things that you think will help you get or keep housing. You'll also share what you see as potential challenges and concerns, like things that might make it hard to get or keep housing. It's important for you to share your hopes and*

concerns so your new case manager can know how to best support your needs. And I can help you with this part if you need. And I'll have the chance to add any important items to what you've already shared.

- iii. **NEW SUPPORTS:** *Your new Case Manager will explain what their supports will look like, and how they're going to work with you moving forward. And then you can ask questions you may have about their supports and what things will look like moving forward.*

6. The participant is encouraged to think about questions to ask of both parties during the meeting. They are also encouraged to share any part of their situation that they feel is necessary to comment on during the meeting.

During Meeting

1. Sending party calls meeting to order, makes introductions, outlines time allotted, and purpose.
2. Sending party reviews summary of the work that has occurred with the participant.
3. The participant is encouraged to share their understanding of their strengths, goals, and potential challenges to housing, with help from the Sender if requested.
4. Sending party can add to the information shared. (Sending party is primarily responsible for responding to the participant at this point.)
5. Receiving party asks clarifying questions followed by how their support process will look moving forward.
6. Participant is given the chance to ask clarifying questions or respond to what the receiving party has said.
7. Meeting concludes with receiving party primarily responsible for further contact, guidance, and support of the participant.

Additional Considerations

The warm handoff may need to take place over several shorter meetings depending on the needs of the participant. For example, an initial meeting may just involve introductions. A second meeting involves the sending party outlining and reviewing what they know of the participant. The third meeting involves the participant asking questions of both parties. And the final meeting involves the receiving party outlining their support process moving forward.

Once the Receiving party has given the overview of their support process, the sending party should make a clean break regarding supports and planning. (They may remain involved as a support to the receiving party when needed, but should not be relied on by the participant as the primary support, as this can confuse roles. All housing and support related items need to be funneled through the new Case Manager.)

What creates a good experience for all parties

- Clear and transparent communication
- The participant understands the basics of what PSH is and is not, prior to meeting
- Participant has given informed consent to participant in PSH, prior to meeting
- Participant is aware of what the warm handoff is, why it's taking place, and what it entails.
- All 3 parties are actively involved in the process
- Create an environment where rapport can be built
- Participant has an active voice and role in the process
- Appropriate information has been shared before and during the meeting, no big surprises
- Participant is given the opportunity to ask questions, add to or amend any info shared about their situation
- Clear documentation of the event

What can hinder the process for all parties

- Not allotting enough time for the meeting and rushing things along
- Having outside distractions during the meeting (phone ringing, checking phones, being pulled into other activities)
- Not ensuring a private space for the meeting where confidential info is being shared and discussed
- Not giving the participant room to share information or ask questions