# Client Referral Workflow

A diagram of a process

AI-generated content may be incorrect.

1. Referral Initiation and Eligibility Screening: Referrals will originate from IDOC approximately 90 days before release. Referral sources submit a Referral Formthrough a secure intake portal, attaching a screening packet with key client data. The packet includes demographics, criminal history (flags for sex offense or arson), mental health information, and any release conditions. Upon receipt, B2H staff review basic eligibility criteria – for example, confirming the individual is within 90 days of release, eligible for B2H programming, willing to participate, and not under inpatient commitment. If the initial criteria are met, a reentry case manager is assigned to begin the intake process.
2. Landlord Engagement & Unit Matching**:** In parallel with client intake, a Network Housing Developer engages housing providers. Landlords complete a Landlord Information & LOI Formto express interest. This form captures unit details (location, type, ADA accessibility, etc.) and the landlord's capacity to house B2H participants. TASC will provide landlords a program summary and a documentation checklist outlining required documents (e.g., property inspection reports, tax ID, W-9). Suitable housing units are matched to participants based on geographic preference and needs. Once a tentative match is found, the landlord signs a Letter of Intent (LOI) and supplies the required unit documents. A Tenant–Landlord Match Form is then automatically generated to pair the specific client with the corresponding housing unit. This form records the property details (e.g., unit type, readiness date, any pet allowances) and becomes part of the client’s file.
3. Client Intake and Support Planning: B2H staff conducts a comprehensive and in-depth intake with the participant to assess their housing and support needs. A Supportive Housing Eligibility & Readiness Assessment is completed by a community support specialist in collaboration with behavioral health staff. This tool evaluates the client’s mental health status, medication adherence, daily living skills, and potential risk factors (e.g., aggression, active psychosis) to determine the appropriate housing support level. Based on the assessment, the community support specialist develops an individualized service plan with the participant. Key elements such as the client’s risk level, ability to live independently, and wraparound services needed – are documented. The participant’s housing preferences and any special accommodations (e.g., preferred case manager language or religious considerations) are noted as well. If the participant is deemed not ready for independent living, alternate arrangements (e.g., higher-acuity residential placement) will be considered at this stage. Otherwise, the community support specialist proceeds with preparing housing placement.
4. Housing Inspection & Approvals**:** Before move-in, each matched housing unit must pass compliance checks. The Network Housing Developer coordinates a property inspection with the landlord and participant. Using the Housing Inspection Checklist, staff log the inspection date, note any deficiencies, and mark whether the unit passed or requires follow-up. Every day, checklist items include habitability standards and any lease addendum reviews (for example, confirming that there are no prohibited conditions for the client). Once the unit passes inspection and is lease-ready, B2H moves into the final approval phase. The Supervisor (and/or an oversight committee) reviews the case for administrative approval. Before approval, staff must upload all required documents, including the participant’s finalized Service Plan, the signed landlord lease, and tax forms (W-9, ACH), as well as a brief Housing Plan Summary detailing the placement. The supervisor verifies that all documentation is in place and that the housing plan meets program standards, then issues an approval for the client to move into permanent housing.
5. Placement & Move-In Orientation**:** With approvals secured, the participant moves into the unit, typically aligning with the individual’s release date. The landlord, participant, and B2H staff complete a formal lease signing and orientation. The participant reviews and signs a Move-In Checklist that covers key move-in tasks and provides an orientation to the unit and program rules. Landlords receive an orientation packet to clarify program contacts and procedures. On the move-in day, B2H staff assists the client with transportation from the correctional facility, a unit walk-through, and immediate needs (starter groceries, hygiene supplies, etc.). Any parole requirements (such as a 72-hour residential lockdown) are currently being coordinated. Once the client is safely housed, a 72-hour intensive support window begins, during which staff make daily check-ins to stabilize the individual.
6. Post-Housing Stabilization & Follow-Up**:** After placement, the team will provide ongoing case management and monitoring to ensure housing stability. A peer support specialist and community support specialist will conduct weekly follow-ups initially, focusing on life skills coaching, connection to mental health services, benefits enrollment, and any court-ordered requirements. B2H staff log each contact and track the client’s progress in the electronic system. Any incidents or lease violations trigger the completion of a Violation/Incident Report Form to document the issue and its resolution. Key stabilization metrics – such as whether the client remains housed at 6 and 12 months – are monitored and reported to program partners. This post-placement support phase ensures that each participant has access to the necessary wraparound services to maintain housing and work toward achieving long-term independence.