Housing Voucher & Program Navigation Decision Guide

This decision-support guide helps Housing Specialists work through the questions that matter when a client needs housing assistance. It is not an automatic eligibility test. Always verify requirements with the responsible agency before giving program-specific guidance.

1. Housing Situation Assessment

Establish the client's current circumstances and immediate needs.

Client / Case Ref: _____ Specialist: _____

Current Housing Situation

- ☐ Currently in shelter / temporary housing
- ☐ At risk of losing current housing (arrears, notice, etc.)
- ☐ Living with family/friends (doubled up)
- ☐ Street homeless / unsheltered
- ☐ In permanent housing but needs transfer or new voucher
- ☐ Other / not yet clear

Immediate Needs / Priorities (brief notes)

2. Five-Step Decision Path

Work through these steps in order. Document answers and next actions.

Step 1 — Existing Assistance

Does the household already have an active voucher, subsidy or pending application?

- ☐ Yes – active voucher / subsidy
- ☐ Yes – application pending
- ☐ No – no current assistance
- ☐ Unknown – needs verification

Step 2 — Household Composition & Needs

Key factors that may affect program pathway (check all that apply):

- ☐ Family with children
- ☐ Single adult
- ☐ Senior / elderly
- ☐ Disability / accessibility needs
- ☐ Domestic violence history
- ☐ Large household size

Step 3 — Documentation Readiness

Is essential documentation available or obtainable?

- ☐ ID / proof of identity ready
- ☐ Income / benefits verification available
- ☐ Household composition proof ready
- ☐ Significant documents still missing

Step 4 — Referral & Next Action

What is the most appropriate immediate next step?

- ☐ Refer to HRA / CityFHEPS pathway
- ☐ Refer to FHEPS / domestic violence pathway
- ☐ Refer to NYCHA / Section 8
- ☐ Shelter caseworker / internal housing unit
- ☐ Legal / advocacy partner
- ☐ Further assessment needed first

Step 5 — Open Questions

List any unresolved eligibility or process questions that must be verified with an agency:

3. Program Comparison Snapshot

High-level comparison only. Verify current details with official sources before advising.

Feature	CityFHEPS	FHEPS	Section 8 (HCV)
Primary focus	Homeless / shelter exits	Domestic violence / safety	Low-income households
Typical admin	HRA	HRA / related	NYCHA / PHA
Key pathway	Shelter / DHS referral	Safety planning + referral	Waiting list / preference
Unit approval	Inspection required	Inspection required	Inspection required
Portability	Limited / local rules	Limited / local rules	Possible under HUD rules
Notes / cautions			

Important Reminders

- ☐ Program names, rules and payment standards change. Re-verify before each new case.
- ☐ Never promise a specific program outcome or payment amount.
- ☐ Some households may be eligible for more than one pathway — document options clearly.
- ☐ When in doubt, refer the question to the administering agency or a supervisor.

4. Eligibility Questions & Verification Log

Organize questions that must be answered by the responsible agency.

Question / Issue	Agency / Contact	Date Asked	Response / Status

Follow-up Actions Required

5. Client Communication & Referral Planning

Explain next steps clearly without promising approval or specific outcomes.

Key Messages to Communicate

- [ ] I have outlined the possible pathways based on the information we have so far.
- [ ] Final eligibility and approval decisions are made by the administering agency.
- [ ] We will help gather documents and prepare the referral / application package.
- [ ] I will follow up with you on the next concrete step and timeline.
- [ ] If new information changes the picture, we will reassess together.

Referral / Next-Step Plan

Primary next step:

Who is responsible: date:

Documents still needed:

Client understanding confirmed: ☐ Yes ☐ Needs further explanation

Additional notes for the case file

6. Practical Case Exercise

Fictional Scenario

Maria and her two children (ages 7 and 10) entered a family shelter three weeks ago after leaving an overcrowded apartment. She has no active voucher. She reports a past domestic-violence incident but is unsure whether she has an open case. She has a birth certificate for one child and a school letter for the other. She wants to know “which program will get us an apartment fastest.”

Apply the Framework

1. What is the current housing situation and most urgent need?

2. Which decision-path steps are most relevant here?

3. What questions must be verified with an agency before advising?

4. How would you explain next steps to Maria without promising a timeline?

Completed by: