

# Applying CTI Core Components to Existing Documentation

Case Presentation Session



Housing Transitions

**QUERI**

- A core component of CTI is developing, setting, planning, and assessing SMART goals
- Most sites are already using goals w/ Veterans in some way before CTI, but there are a few distinctions:
  - In CTI, there are 1-3 goals focused on *per Phase*
  - This means shorter intervals for action steps – “*what can the Veteran realistically achieve in the next two months?*”
  - Goals are used to guide the work within each Phase
  - Goals are assessed at the end of each Phase
  - Goals are connected to their housing instability/ homelessness

# Phase Plan Form



- The CTI Phase Plan is a form used to apply focused goals with Veterans
- [https://www.vactitoolkit.com/uploads/1/3/7/6/137694226/phase\\_plan\\_fillable\\_2022.pdf](https://www.vactitoolkit.com/uploads/1/3/7/6/137694226/phase_plan_fillable_2022.pdf)

<b>Focused Goals &amp; Phase Plan Form</b>	> 1 – 3 focused goals (i.e., SMART goals) per phase. > Goals are connected to Veteran's reason for becoming homeless.	>Phase Plan is completed at beginning of Phase 1 <u>and</u> end of Phase 1 (goal summary)	> Phase Plan is completed at beginning of Phase 2 (fresh version of form) <u>and</u> end of Phase 2 (goal summary)	> Phase Plan is completed at beginning of Phase 3 (fresh version of form) <u>but NOT</u> end of Phase 3 (use Closing Note instead)
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Guidance on using this form can be found in the CTI Manual or the CTI “Cheat Sheet”

The screenshot shows the 'CTI Phase Plan' form. At the top right is the 'Housing Transitions QUERI' logo. Below the title, there are three checkboxes for 'Phase One: Transition', 'Phase Two: Try-Out', and 'Phase Three: Transfer'. The form includes fields for 'Today's Date' (Month, Day, Year) and 'Veteran's Name'. There are also fields for 'Date Phase Starts' and 'Due Date for End of Phase', each with Month, Day, and Year sub-fields. A section titled 'Check the focus areas for this Phase: (Choose 1 to 3 areas)' contains two columns of checkboxes for various categories: Benefits, Employment, Survival Needs (food, clothing, furniture, etc.), Child Care, Transportation, Education (child/adult), Natural Supports, Budget Management, Health and Mental Health, Children's Health and Mental Health, House, and Legal Concerns. At the bottom, there is a section for 'Area #1' with a text input field, a 'Reason for choosing this area:' label, and an 'Overall goal for this area:' label.

- Sometimes sites decide to use CTI forms, but this is not always possible
- When sites have an existing system (example: electronic health record, database, etc.) or existing form(s) for documentation
  - We do **not** want duplication of effort or forms
  - We start with determining whether the site's existing electronic or paper forms can be changed to align with CTI
  - If they cannot be changed, we identify how we can adapt the way they used to align with CTI

# Example from a Wave 2 Site



- Example: US Vets Las Vegas has an existing electronic system for tracking goals:
  - “Habitation plan” – name of electronic form used for tracking goals
  - How can we document and track SMART goals the way CTI outlines?
- Let’s see how we can apply a structure similar to the CTI Phase Plan form to the Habitation Plan

# Case presentation: Rhonda Carlson



Housing Transitions

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# Case presentation 1: Background



- **Demographic information** (age, gender, race & ethnicity, marital status): 56, male, Caucasian, divorced
- **Reason for homelessness/ housing instability** (including medical, mental health and substance use concerns): evicted due to allowing too many people to live in the home and substance use occurring
- **Existing supports** (financial, family, social): SSVI, one son that lives close by- not a lot of social support- had a partner
- **Recruitment info** (where was Vet before, how did they learn about program): Veteran found out about transitional housing through VA PCP
- **Veteran's strengths:** Veteran is motivated and navigating resources- has barriers due to cognitive deficit

# Case presentation 1: CTI phase & goals



- **Current CTI phase:** was in phase 3- then got an eviction notice and now is in an extended phase 3
- **1-3 focused goals for this phase**
  - Goal 1: prevent eviction
    - Action steps: helped Veteran apply for assistance
    - Progress: working with housing authority to pay back rent, applied for a grant toward back rent,
  - Goal 2:
    - Action steps:
    - Progress:
  - Goal 3:
    - Action steps:
    - Progress:
- **Resources and support linkages related to goals:** case management, local housing resources, local food access
- **Barriers to achieving goals:** potential cognitive issues, lack of follow through
- **Facilitators to achieving goals:** assistance with linkages to long term resources (housing, rent, food, disability assistance)



- **What is going well** (generally; with applying CTI): Client has been easy to work with the last 2 months, has been linked to a number of services → transportation services, assistance maintaining the home
  
- **What is challenging** (generally; with applying CTI): potential cognitive decline, possible substance use, mental health problems, history of not showing up for appointments
  
- **Planning for upcoming phases or discharge**
  - What goals need to be adjusted? Linkage to continuing services – health, social work, mental health, housing, transportation
  - What are the ongoing threats to housing stability? Potential substance misuse, cognitive decline, depression, lack of engagement with healthcare, isolation
  - Are there life skills that can be transferred? Payee services to help maintain housing/pay rent, can navigate VA services
  - Are there ways to promote autonomy and independence in housing?
  
- **Feedback question for the group: what have others done to engage a client with substance use**

- **(Optional) Drop-in Hour: May 24th, 2023**

11-12am AKST / 12am-1pm PST / 1-2pm MST / 2-3pm CST / 3-4pm EST

- Stop by if you have questions, would like to discuss a case, or have a burning desire to learn more about CTI!

- **Next CoP: June 7th, 2023**

10-11am AKST / 11am-12pm PST / 12-1pm MST / 1-2pm CST / 2-3pm EST

- **Speaker session:** Andrea White from Housing Innovations will return to discuss tapering intensity of services and transitioning Veteran care to a support network. This is an opportunity to receive support for navigating other CTI questions or concerns.

- **No CoP or Drop-in Hour on May 31<sup>st</sup>!**