

HRSN Training Module: Service Provider Example Workflows

August 2025



Today's Agenda

- 1 | Background on HRSN**
Review Health-Related Social Needs (HRSN) services
- 2 | Workflow from Laurel Hill Center**
Learn from Laurel Hill Center's tracking processes and internal workflow for providing rent assistance
- 3 | Workflow from Northwest Family Services**
See internal processes for providing rent assistance and utility arrears from start to finish
- 4 | Workflow from Plaza de Nuestra Comunidad**
Hear about systems for managing rent and utility assistance service requests and provision
- 5 | Additional Resources**
Review resources available to HRSN service providers

Background



Health-Related Social Needs

- **Health-Related Social Needs (HRSN) benefits** include housing, nutrition, and outreach and engagement services for eligible Oregon Health Plan (OHP) members.
- **HRSN service providers** can provide services for one or more of these benefits by contracting with a local coordinated care organization (CCO) and/or Open Card/fee-for-service.
 - To learn more about becoming a CCO provider, please [contact the CCO directly](#).
 - To learn more about becoming an Open Card provider, visit the provider [enrollment webpage](#) or watch the [enrollment training](#).

In this training, we'll share **examples of workflows from HRSN service providers enrolled with CCOs and Open Card.**

Coordinating HRSN Services: Open Card

Open Card's role is to:

- Contract with a network of service providers throughout the state that offer HRSN services.
- Partner with Ayin for invoicing and payment to HRSN service providers.
- Work with Acentra to authorize services, receive service requests, send referrals to contracted HRSN service providers, and provide care coordination for Open Card members.

You can expect Open Card communications, processes for referral and requirements for invoicing to be consistent across the state, no matter what region you work in.

Coordinating HRSN Services: CCO

The coordinated care organizations (CCOs) role is to:

- Decide what service providers in their region to contract with.
- **Authorize services** and **confirm eligibility** for OHP members enrolled in their health plan.
- Receive service requests, send referrals, and handle invoicing.

CCOs may use a community information exchange platform, like Unite Us or findhelp, to share HRSN information among partners.

The workflows that we'll share today may be different than the ones your CCO uses.

We hope that these workflows will give you examples to learn from but acknowledge that these workflows are not relevant to every organization. Take what is useful for you and leave the rest!

Service Provider Workflows



Service Provider Share-Out: Laurel Hill Center



Emily Yates, She/Her
Housing Services Coordinator
Laurel Hill Center

Service Provider Overview: Laurel Hill Center

- Enrolled as an HRSN **housing** and **outreach and engagement** service provider with Trillium CCO, Pacific Source CCO and Open Card.
 - Help eligible OHP members with rent assistance
 - 5 staff work part-time on HRSN while balancing other responsibilities
- **Outside of HRSN we offer:**
 - Mental health services
 - Supportive housing, including rent assistance programs
 - Employment and education programs

Service Provider Overview: Laurel Hill Center (Continued)

- **Tracking Information**

- Referrals received from CCOs via **Unite Us**
- **Internal spreadsheets** are used to assign a case manager and track progress.
 - Each tab is a unique member.
 - Information includes date of referral, household size, income, months rent owed, amount each month, and current needs.

- **Braiding funding**

- Emergency rent assistance is sometimes available from the county for support beyond the 6 months of HRSN
- Long term rental assistance programs, currently supporting about 35 people

Workflow: Laurel Hill Center

1. Receive a referral

- Directly from CCO (Trillium) via Unite Us
- Group of CCO (Pacific Source) members who have a service request open via Unite Us
- From Open Card via Acentra

2. Referral assigned to housing team staff

- Housing services coordinator reviews referrals, creates a spreadsheet for each new member, and assigns cases to housing team staff.
- New assignments are distributed each Monday

3. Connect with the member

- At least 3 times and 2 different ways (e.g., phone calls and scripted email)
- If needed, connect the member with an interpreter or refer to other HRSN provider
- Assess the severity of the situation (facing eviction vs. needing rent for next month)
- Connect with the landlord, utility company, or other third party to get necessary documentation.
- Complete eligibility screening questionnaire in Unite Us with the member

Workflow: Laurel Hill Center (Continued)

4. Document necessary information

- Document all member information in internal tracking spreadsheet.
- Spreadsheet separated by members enrolled, waitlisted, and archived or closed cases.
- Case managers track time throughout the week and invoice weekly for these activities

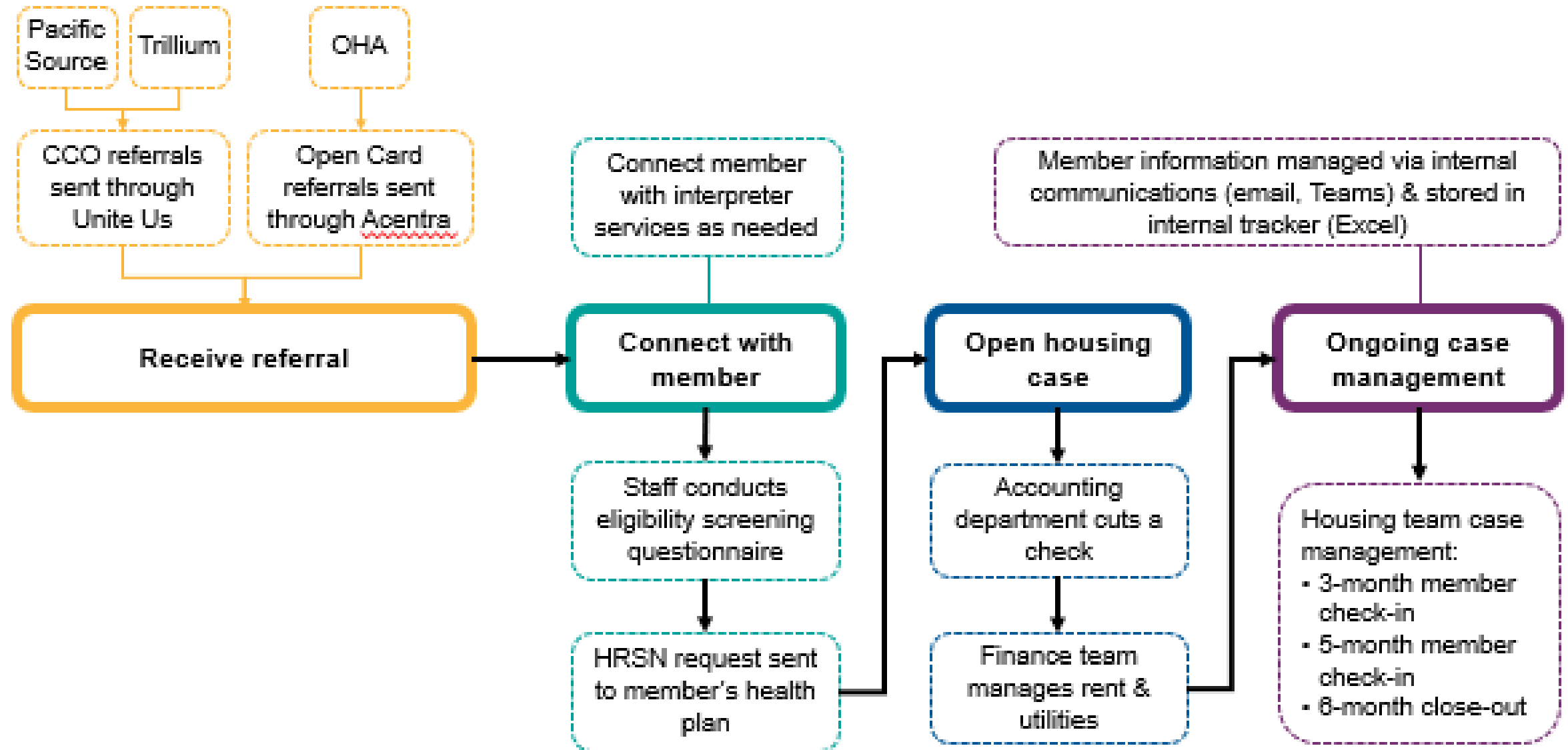
5. Open housing case

- For CCO members, after gathering relevant documentation and information, case managers submit a service request to the CCO through Unite Us.
- Once the service is authorized, the housing services coordinator submits a check request to the finance team.
- The finance team will write a check and send it to the landlord, utility company, or other relevant third party
- The finance team invoices the CCO for the direct services
- Case manager reaches out to member with update.

6. Ongoing case management:

- Staff invoice for time throughout each week
- Case management staff checks-in with members at 3 and 5 months, and finally at 6 months to close case.

Workflow: Laurel Hill Center



Service Provider Share-Out: Northwest Family Services (NWFS)



Samantha Ferris, She/Her
HRSN Program Manager, NWFS

Provider Overview: Northwest Family Services

- Enrolled as an HRSN **housing** and **outreach and engagement** service provider with Health Share of Oregon CCO.
 - **Help members in the Clackamas county** with HRSN tenancy services, rent assistance, utility payment, and O&E services.
 - 6 full-time case managers, 1 full-time employee focused on billing, and 1 full-time employee focused on accounts payable
- **Outside of HRSN we offer:**
 - Basic needs supports (climate, nutrition, taxes)
 - Behavioral health services
 - Health and systems navigation
 - Youth empowerment resources

Provider Overview: Northwest Family Services (Continued)

- **Tracking information**
 - **Unite Us** houses the member referral form and is how referrals are received.
 - Internal purchase requests are made via **Microsoft Teams**.
 - Case notes, documentation and communication with external parties are captured and tracked in **OneNote**.
 - Exploring options for case management software but have not adopted one yet.
- **Braiding funding**
 - Short-term rent funding available to use in special cases to prevent members from eviction.

Workflow: Northwest Family Services

1. Receive a referral

- From Health Share of Oregon via Unite Us – Sent directly from Healthshare
- Self-referral from existing members
- For self referrals, we help them apply for support through their CCO and get them on the waiting list

2. Connect with the member

- Case worker assignment based on member language needs.
- Connect with member to evaluate needs (e.g., tenancy support, rent, utilities, storage unit)
- Case worker confirms member request and verifies OHP eligibility through MMIS

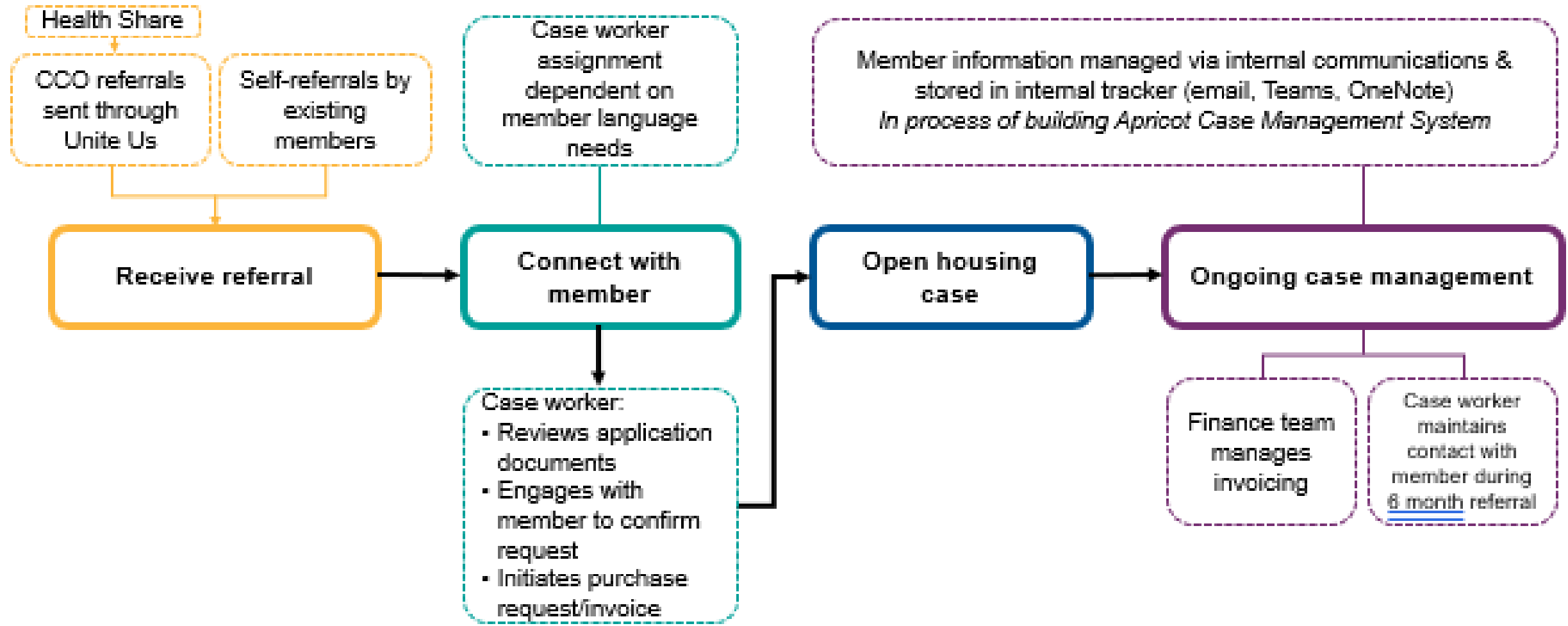
3. Open housing case

- After Manager has accepted the referral and assigns to a Case worker, the file is reviewed for application documents and reaches out to client and landlord to establish program guidelines and expectations.
- Case worker submits internal purchase request to finance department (via Teams)
- Finance team pays landlord and submits invoice through Unite Us

4. Ongoing case management:

- Finance team manages invoicing
- Case worker maintains contact with member and tracks services through internal notes (Teams, email, and OneNote). Check ins are at the very least once per month, but naturally communication is happening more.
- Case managers track their time and invoice for O&E or tenancy. The case managers complete the invoicing themselves.

Workflow: Northwest Family Services Process



Service Provider Share-Out: Plaza De Nuestra Comunidad



Pablo Sierra, He/Him/Él
Plaza de Nuestra Comunidad

Overview: Plaza De Nuestra Comunidad

- **HRSN housing and outreach and engagement** provider with Pacific Source CCO.
 - Help primarily Latinx members in Lane County with rent and utility assistance services.
 - One staff manages case management tasks (accepting referrals to sending invoices).
- **Outside of HRSN we offer:**
 - Social services program: health insurance, food assistance application navigation (SNAP), rent assistance, and more
 - Mental health and recovery services
 - Community gardening
 - Small business development
 - Education and youth development

Overview: Plaza de Nuestra Comunidad (Continued)

- **Systems used for tracking cases**
 - Unite Us: 5-10 referrals received per month
 - Case management tool: **Quickbase** is used to track members.
 - **Internal spreadsheet** is used to share notes across staff members.
- We use a variety of rent/utility assistance funding sources to avoid eviction and prevent houselessness through federal, state, and county programs.
- Our agency maintains an active referral system to other resources through partnerships, helping to support our community.

Workflow: Plaza de Nuestra Comunidad

1. Receive a referral

- Referrals from Pacific Source CCO via Unite Us
- Case manager analyzes case and decides whether they have capacity and ability to support that individual or to reject the referral and send it along to another organization.

2. Connect with the member

- The case worker contacts the member, reviews application documents, discusses eligibility requirements, and shares program restrictions.

3. Collect necessary information

- Gather documentation from the member, such as pay stubs and utility bills.
- Upload documents to Unite Us for the CCO

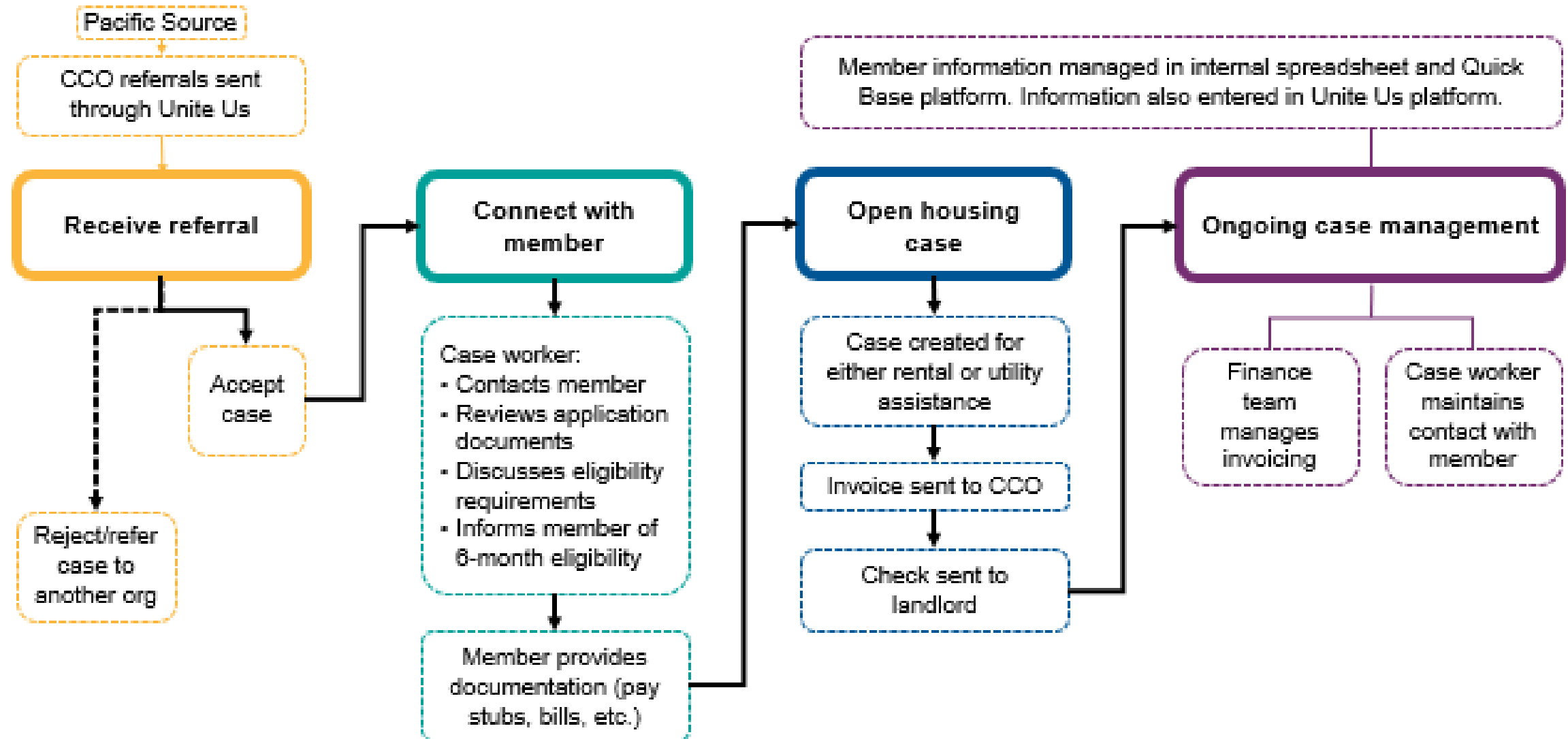
4. Open housing case

- Case created for either rental or utility assistance
- Contact landlord to get rental agreement
- Once the CCO approves the case, they approve the contracted services for rent and utilities
- Case sent to fiscal department for invoice and forwarded to CCO for final review and acceptance
- Check sent to landlord

5. Ongoing case management

- Maintain contact with member, inform them that assistance is ongoing and available for up to 6 months
- Send promissory note to landlord once the invoice is accepted by the CCO

Workflow: Plaza De Nuestra Comunidad Process



Next Steps and Resources



Ready to get started?



Enroll as an HRSN provider with a CCO, Open Card, or both:

- **CCO:** You can [contact the CCO\(s\)](#) in your area to learn how to apply to become a provider for each CCO.
- **Open Card:** Visit the [Provider Enrollment webpage](#) to get started. We recommend viewing the [HRSN provider enrollment training materials](#).



Bookmark OHA's HRSN resources

These pages get updated frequently with new HRSN resources and materials:

- [1115 Waiver HRSN Webpage](#)
- [HRSN Service Provider Webpage](#)
- [HRSN Provider Training Webpage](#)



NEW: HRSN Provider Journey

The [HRSN Provider Journey](#), a resource for providers, has been updated.

Upcoming Opportunities



- ★ **Monthly office hours through the end of 2025**
Registration information will be emailed out and posted to the [HRSN Provider Training webpage](#).
- ★ **Upcoming and past HRSN provider learning opportunities**
are available on the [HRSN Provider Training webpage](#).

We value your feedback

To help us improve our future trainings for HRSN service providers, please fill out this anonymous, five question survey.

English: <https://www.surveymonkey.com/r/Y87W7LK>

Español: <https://es.surveymonkey.com/r/PN6JGL8>



Thank You

