

Service	Unit Definition	Service Activity Example	Units to Report/Where
<b>Information &amp; Assistance (I&amp;A)</b>	One Contact	Staff <u>assists client in person</u> at the office with a housing application. Staff later makes a <u>phone call to the housing complex</u> w/a question on client's behalf. Staff <u>calls client</u> to discuss status of application and learns client needs resources for food. <u>A list of food pantries is mailed to the client.</u>	4 units under I&A
<b>Outreach</b>	One Contact. Outreach units are based on one-on-one contacts by a service provider.	Staff <u>conducts outreach call</u> to an older adult not previously known to the agency and discusses services and resources available.	1 unit under Outreach
<b>Options Counseling</b>	One Contact. See additional guidance under "Other Helpful Information."	Client needs assistance obtaining permanent affordable housing and isn't sure where to start so Options Counseling is provided. <u>Staff have 10 contacts with client in 3 months related to initial goal of obtaining housing,</u> which included 3 phone calls with the soon-to-be-landlord.	10 units under Options Counseling
<b>Flexible Community Services (FCS)</b>	One person=One Unit  FCS persons and units should always be the same number	Client needs assistance with rental assistance. Provider pays the overdue rental payment.  Note: Client may also be receiving assistance for FCS via I&A or Options Counseling. Report units as indicated above.	1 unit under FCS

**Other Helpful Information:**

- Persons should be reported as unduplicated by service, by year. Example: If there are 5 I&A contacts with Fred Rogers in one fiscal year, he is reported as 1 person for the whole fiscal year who received 5 units of service.
- Units for I&A, Outreach and Options Counseling may be counted for active methods of contact with clients such as: phone calls or virtual assistance (e.g. Zoom), in-person assistance, chat messaging, active referrals or follow ups to another service provider made on behalf of a client, and outgoing mail or email to clients with information and resources. Incoming emails, faxes, letters, or requests received on your website/social media may not be counted as units. A unit of service cannot be counted until the provider actively provides information back to the client (or person contacting on their behalf).
- If a worker begins providing I&A and then turns the same interaction with a client into Options Counseling, then I&A CANNOT be counted in addition to Options Counseling, since Options Counseling is the primary service being provided. However, if the worker schedules a separate appointment with the client for Options Counseling, then the initial interaction can be counted as I&A.
- Once Options Counseling has begun with the client, follow up contacts with or on behalf of the client will be counted as Options Counseling units while the case is open and active. If the client contacts you after the Options Counseling case has been closed, then you would count the contact (unit) under the appropriate service (for example, I&A). However, if the issue/need is related to their previous Option Counseling case or it seems appropriate again to offer Options Counseling – then you can count those contacts as Options Counseling units.