

**SERVICE AGREEMENT
BETWEEN SANTA FE COUNTY AND NEW MEXICO REENTRY CENTER**

This Agreement is entered into this 10th day of December 2025, between **Santa Fe County**, a political subdivision of the state of New Mexico (the “County”), and **New Mexico Reentry Center**, 1215 4th St NW, Albuquerque, NM 87102 (the “Contractor”).

Background

WHEREAS, the Santa Fe County Community Services Department (CSD) has implemented the *Accountable Health Community* also known as CONNECT; and

WHEREAS, the purpose of CONNECT is to provide funding assistance to organizations who provide services to individuals or clients who are in high-risk or high-need populations due to social determinants that have influenced a person’s health and well-being; and

WHEREAS, CONNECT helps residents and citizens to navigate available community services and clinical care and offers providers access to data and information to better serve the health needs of residents and clients; and

WHEREAS, pursuant to NMSA 1978, Section 13-1-98.1 (B) ((Hospital and health care exemption), the Procurement Manager has determined that the procurement of these services to be provided by this Contractor is exempt from a competitive solicitation; and

WHEREAS, the Procurement Manager determines that pursuant to Section 50 (A) of the Santa Fe County Purchasing Regulation (Multi-term contracts, Determination Prior to use), and NMSA 1978, Section 13-1-151 (Multi-term contracts; determination prior to use), that the estimated requirements cover the period of the contract, and are reasonably firm and continuing, and that the contract term will serve the best interest of the County; and

WHEREAS, the County wishes to benefit from the Contractor’s services that will help to provide increased capacity and additional resources to the CONNECT network.

Agreement

1. CONTRACTOR’S SERVICES

- a. Provide case managers or navigators to provide navigation services to individuals experiencing or at risk of homelessness and prioritize those who have high utilization of the ER and/ or the Santa Fe County Adult Detention Facility (SFCADF). Contractor’s navigators must be experienced and qualified and engage in continued educational opportunities on an annual basis..
- b. Screen for demographics and social needs of patients using categories and screening tool described in Attachment A (CONNECT SDOH Screen).
- c. Assess clients’ social determinants of health, including safe and secure housing, nutritional food, reliable utilities and transportation and access to health insurance.
- d. Provide navigation to individuals in need of supportive housing, including assisting individuals to access immediate needs related to shelter, medical services, benefits enrollment, food, clothing, hygiene, and referral to services to meet longer term needs (job skills training and placement,

literacy and life skills, legal support and advocacy), using the screening tool, Unite Us platform and other coordinated entry systems.

e. Participate in the NM Coordinated Entry System (NMCES), managed by the NM Coalition to End Homelessness (NMCEH), as follows:

1. Ensure that shelter intake staff are trained to complete an assessment identified by NMCEH.
2. Complete the assessment with all persons experiencing homelessness who present to the Contractor for housing services and provide the completed assessment to NMCES by sending the assessment to NMCEH or entering it into Housing Management Information System (HMIS).
3. Select from the NMCES priority list to fill housing openings when appropriate.
4. Participate in case conferencing when intakes result in new clients who end up on the priority list.

f. Assure navigator participation in facilitated trainings offered by CSD.

g. Deliver navigation services tailored to the individual's priorities that are culturally relevant and based on a team approach of service delivery that documents cross-agency collaboration.

h. Develop a primary navigation plan with the individual or ensure a warm hand off to a CONNECT partner agency navigator who will do so. The navigation plan should set goals such as addressing safe and secure housing, food, utilities and transportation, health system enrollment and education and literacy; preventative care and treatment; chronic disease management; and effective social and community referrals.

i. Identify community and social resources tailored to the individual's needs and develop and facilitate a network/team to address priorities of the navigation plan; develop sustainable relationships with community resources, provide and document a warm hand-off. Referrals will be complete if a sustained relationship has been verified by the service provider and documented by the navigator.

j. Using the Unite Us platform, provide CSD with quarterly data on the social determinants of health, demographics, and client use of the ER and SFCADF.

k. Using the Unite Us platform, participate in data sharing with other community and social organizations on activities related to navigation plans with consent of the clients and participate in negotiating agreements with community partners. Share aggregate and non-medical client data with other County-funded partners and CSD.

l. Using Share NM, post the organization's community education, outreach and training events on a community calendar, and register and update organization information as needed.

m. Assure that all employees receive training on the Health Insurance Portability and Accountability of 1996 (HIPAA) standards, P.L. 104-191, and the HIPAA Privacy Rule, 45 CFR Part 160, 162, and 164, and adhere to all HIPAA requirements and policies.

n. Adhere to Navigation Protocols and Flexible Fund protocols developed to serve as a payer of last resort for one-time expenses related to social determinants of health and Network Standards (see Attachment B - Navigation Protocols and Network Standards).

o. Ensure clients served meet the eligibility for the Santa Fe County Health Care Assistance Program.

1.1 The County shall:

a. Provide Contractor with a login to the Unite Us platform for Contractor's designated case manager/ navigator or assigned staff.

- b. Reimburse Contractor at a rate of \$1,000.00 per individual served.
- c. Reimburse Contractor for expenses made to access funds according to the Flexible Fund guidelines established in the Navigation Protocols (see Attachment B).
- d. Provide training and on-going technical assistance on the use of the Unite Us platform.

2. ADDITIONAL SERVICES

A. The parties agree that all tasks in section 1 (Contractor's Services) will be completed to the County's satisfaction and for the amount stated section 3 (Compensation, Invoicing and Set-off).

B. The County may request changes in the Contractor's Services. Any changes to the Contractor's services must be made by written amendment.

3. COMPENSATION, INVOICING AND SET-OFF

A. In consideration of its obligations under this Agreement the Contractor shall be compensated as follows:

- 1) Of the total not-to-exceed compensation of \$59,750.00, the sum of \$50,000 will be available to reimburse Contractor for navigation services provided to clients who met the criteria of the Santa Fe County Health Care Assistance Program (HCAP) (see Santa Fe County Resolution No. 2014-47). This sum is calculated based on a minimum of 50 HCAP-eligible clients being served or provided with navigation services by the Contractor at the rate of \$1,000.00 per client.
- 2) Of the total not-to-exceed compensation of \$59,750.00, the sum of \$9,750 will be available to reimburse the Contractor solely for costs relating to addressing emergency circumstances faced by an indigent clients and that are related to social determinants of health. *No funds under this Agreement shall be issued directly to Contractor's clients.* Funds under this Agreement may be utilized by the Contractor after all other resources of revenue have been sought and exhausted.
- 3) The total not-to-exceed compensation payable to the Contractor for the term of this Agreement shall not exceed **\$59,750.00**, *inclusive* of NM GRT.

B. The Contractor must submit a written request for payment to the County when payment is due. Upon the County's receipt of the written request, the County will issue a written certification of complete or partial acceptance or rejection of the services for which payment is sought. The County will not make payment until the County issues a written certification accepting the services.

- 1) The County's representative for certification of acceptance or rejection of contractual items and services is **Jennifer N. Romero, Community Services Deputy Director, (505) 995-9526, jnromero@santafecountynm.gov**, or other individual as may be designated by the County.

- 2) Within 30 days of the issuance of the certification accepting the services, the County will make payment for the services. If the County does not issue payment for accepted services within 30 days of the certification by the County, the County will pay a late payment fee of 1.5% per month until the amount due is paid in full.

C. If the Contractor breaches this Agreement, the County may, without penalty, withhold payments due the Contractor for the purpose of set-off until the County determines the exact amount of damages it suffered as a result of the breach.

D. The County's payment to Contractor will not foreclose the County's right to recover excessive or illegal payment.

4. EFFECTIVE DATE AND TERM

A. This Agreement will become effective on the date of last signature by the parties and will terminate two years from that date, unless earlier terminated under section 5 (Termination) or 6 (Appropriations and Authorizations). The parties may agree to extend the term by written amendment.

B. This Agreement is a multi-term contract under Section 50 of the Santa Fe County Purchasing Regulations, and NMSA 1978, Section 13-1-150 (Multi-term contracts; specified period). Pursuant to Section 50 (D) of the Purchasing Regulations, and NMSA 1978, Section 13-1-152 (Multi-term contracts; cancellation due to unavailability of funds), if funds are not appropriated or otherwise made available to support compensation payable to the Contractor for the 2nd fiscal year this Agreement will be cancelled.

5. TERMINATION

A. Termination for Cause. Either party may terminate this Agreement based upon a breach by the other party. The non-breaching party must give the breaching party written notice of termination stating the specific grounds for the termination. The termination will be effective 30 days from the breaching party's receipt of the notice, during which time the breaching party may cure the breach. If the breach cannot with due diligence be cured within 30 days, the breaching party will have a reasonable time to cure the breach, provided that, within the 30-day period, the breaching party began to cure the breach and advised the non-breaching party in writing that it intended to cure.

B. Termination for Convenience of the County. The County may terminate this Agreement at any time for any reason or no reason, by giving the Contractor written notice of termination. The notice must state the effective date of termination, which must not be less than 15 days from the Contractor's receipt of the notice. The County will pay the Contractor for acceptable services performed before the effective date of termination. The County will not be liable for any services performed by the Contractor after the date of termination.

6. APPROPRIATIONS AND AUTHORIZATIONS

The County's performance of the obligations under this Agreement is contingent upon sufficient appropriations and authorizations by the Board of County Commissioners of Santa Fe County, and if state funds are involved, the Legislature of the State of New Mexico. If sufficient appropriations and/

or authorizations are not made in this or future fiscal years, this Agreement must terminate upon written notice by the County to the Contractor. A termination for non-appropriations or lack of authority will be without penalty to the County, and the County will not be required to reimburse the Contractor for expenditures made in the performance of this Agreement. The County is not committed to the expenditure of any funds until such time as they are programmed, budgeted, encumbered and approved for expenditure by the County. The County's decision regarding appropriations and authorization will be final and will not be subject to challenge by the Contractor in any way, or forum, including a lawsuit.

7. INDEPENDENT CONTRACTOR

The parties intend that the Contractor and its agents and employees will be independent contractors and not employees or agents of the County. Accordingly, the Contractor and its agents and employees will not accrue leave, participate in retirement plans, insurance plans, or liability bonding, use County vehicles, or participate in any other benefits afforded to County employees. Except as may be authorized in this Agreement, the Contractor has no authority to bind, represent, or otherwise act on behalf of the County.

8. ASSIGNMENT AND SUBCONTRACTING BY THE CONTRACTOR

A. The Contractor must not assign or transfer any interest in this Agreement or assign any claims for money due under this Agreement without the advance written approval of the County. Any attempted assignment or transfer in violation of this Agreement will be void.

B. The Contractor must not subcontract or delegate any portion of the services without the advance written approval of the County. Any attempted subcontract or delegation by the Contractor to a non-party in violation of this Agreement will be void.

9. CONTRACTOR'S PERSONNEL

A. The services in section 1 (Contractor's Services) must be performed by the Contractor or under its supervision.

B. The Contractor states that it has, or will secure at the Contractor's expense, all personnel required to perform the services and obligations under this Agreement. Such personnel must not be employees of or have any contractual relationship with the County, and must be qualified and licensed by federal, state and local law to perform the services.

10. RELEASE

The Contractor's receipt of payments or reimbursements due under this Agreement serves as a release of the County, its elected officials, officers, agents and employees from all liabilities, claims, and obligations arising from this Agreement.

11. CONFIDENTIALITY

Any confidential information provided to or developed by the Contractor in the performance of this Agreement will be kept confidential and will not be made available to any individual or organization by the Contractor without the prior written approval of the County.

12. PUBLICATION, REPRODUCTION, AND USE OF MATERIAL; COPYRIGHT

A. The County has the unrestricted right to publish, disclose, distribute and otherwise use, in whole or in part, any reports, data, or other material prepared under or pursuant to this Agreement.

B. The Contractor acknowledges and agrees that any material produced in whole or in part under or pursuant to this Agreement is a work made for hire. Accordingly, to the extent that any such material is copyrightable in the United States or in any other country, the County will own any such copyright.

13. CONFLICT OF INTEREST

The Contractor states that it does not have any interest that would conflict in any manner with the performance of the services and obligations under this Agreement.

14. AMENDMENT

This Agreement may not be modified, altered, changed, or amended orally. To be valid any amendment to this Agreement must be in writing signed by the parties.

15. ENTIRE AGREEMENT; INTEGRATION

This Agreement incorporates all the agreements and understandings between the parties and all agreements and understandings are merged into this Agreement. No prior or contemporaneous agreements or understandings, verbal or otherwise, of the parties will be valid or enforceable unless embodied in this Agreement.

16. NOTICE OF PENALTIES

The Procurement Code, NMSA 1978, Sections 13-1-28, imposes civil and criminal penalties for its violation. In addition, New Mexico criminal statutes impose felony penalties for bribes, gratuities, and kickbacks.

17. EQUAL EMPLOYMENT OPPORTUNITY COMPLIANCE

A. The Contractor agrees to abide by federal, state, local laws, ordinances, and rules and regulations pertaining to equal employment opportunity and unlawful discrimination. The Contractor must not discriminate against any person with regard to employment with the Contractor or participation in any program or activity offered pursuant to this Agreement on the grounds of race,

age, religion, color, national origin, ancestry, sex, physical or mental handicap, serious medical condition, spousal affiliation, sexual orientation, or gender identity.

B. The Contractor acknowledges that failure to comply with this section will constitute a breach of this Agreement.

18. GOVERNING LAW

A. The Contractor will comply with all applicable laws, ordinances, and regulations, including Santa Fe County Ordinance 2014-1 (Establishing a Living Wage).

B. This Agreement will be construed in accordance the laws of the State of New Mexico without regard to its choice of law rules. The Contractor acknowledges that the exclusive forum for any litigation related to this Agreement will be state district courts of New Mexico, located in Santa Fe County.

19. RECORDS AND INSPECTIONS

A. To the extent its books and records relate to (i) its performance of this Agreement or any subcontract entered into pursuant to it or (ii) cost or pricing data (if any) set forth in this Agreement or that was required to be submitted to the County as part of the procurement process, the Contractor agrees to (i) maintain such books and records for a period of six years from the date of final payment under this Agreement; (ii) allow the County or its designee to audit such books and records at reasonable times and upon reasonable notice; and (iii) to keep such books and records in accordance with generally accepted accounting principles (GAAP).

B. To the extent its books and records relate to (i) its performance of this Agreement or any subcontract entered into pursuant to it or (ii) cost or pricing data (if any) set forth in this Agreement or that was required to be submitted to County as part of the procurement process, the Contractor also agrees to require any subcontractor it may hire to perform its obligations under this Agreement to (i) maintain such books and records during the term of this Agreement and for a period of six years from the date of final payment under the subcontract; (ii) to allow the County or its designee to audit such books and records at reasonable times and upon reasonable notice; and (iii) to keep such books and records in accordance with GAAP.

20. INDEMNIFICATION

A. The Contractor will indemnify the County and its elected officials, agents, and employees from any liabilities, damages, demands, suits, costs or expenses, including court costs and legal fees, resulting from the Contractor's performance or non-performance of its obligations under this Agreement.

B. The County may control and participate in the defense of any demand, suit, or cause of action that relate to the County. No matter will be settled without the County's consent. Consent must not be unreasonably withheld.

C. The Contractor's obligations under this indemnification section will not be limited by the terms of the insurance policy the Contractor is required to maintain under this Agreement.

21. SEVERABILITY

If any provision of this Agreement is held invalid or non-enforceable by a court of competent jurisdiction, other provisions will not be affected and will remain valid and enforceable.

22. NOTICE

Notice required to be given to either party must be in writing and delivered in person, by courier service or by U.S. mail, either first class or certified, return receipt requested, postage prepaid, to:

The County: Santa Fe County
Community Services Department
Attn: Jennifer N. Romero, Deputy Director
240 Grant Avenue
Santa Fe, New Mexico 87501
505-995-9526
jnromero@santafecountynm.gov

The Contractor: New Mexico Reentry Center
Attn: Natasha Garcia, Executive Director
1215 4th St NW
Albuquerque, New Mexico 87102
505-389-5458
natashag@nmreentrycenter.org

23. CONTRACTOR REPRESENTATIONS

The Contractor represents that:

A. This Agreement is duly authorized by the Contractor, the person signing this Agreement has authority to do so, and once signed by the Contractor, this Agreement will constitute a binding obligation of the Contractor.

B. The terms of this Agreement do not conflict with Contractor's corporate agreement or any statement that may be filed with the New Mexico Secretary of State.

C. The Contractor is legally registered and is properly licensed by the State of New Mexico to provide the services and will maintain such registration and licensure for the term of this Agreement.

24. FAX OR ELECTRONIC SIGNATURE

The parties agree that a fax or electronic signature will have the same force and effect as an original signature.

25. NO THIRD-PARTY BENEFICIARIES

The parties do not intend by this Agreement to create any rights in any non-parties.

26. CONTRACTOR'S INSURANCE

A. General. The Contractor must submit evidence of insurance as is required in this section. The Contractor's policies of insurance must be written by a company authorized to provide insurance in the state of New Mexico.

B. Liability Insurance, Including Automobile. The Contractor must maintain a comprehensive general liability and automobile insurance policy with liability limits in amounts not less than \$1,000,000.00 combined single limits of liability for bodily injury, including death, and property damage for any one occurrence. Contractor's insurance must include coverage for all services and work performed for the County under this Agreement; coverage for the use of all owned, non-owned, hired automobiles, vehicles and other equipment, both on and off work; and contractual liability coverage under which this Agreement is an insured contract. Santa Fe County must be a named an additional insured on the Contractor's policy.

C. Increased Limits. If the Legislature of the State of New Mexico increases the maximum limits of liability under the New Mexico Tort Claims Act, the Contractor must increase the maximum limits of any insurance required under this Agreement.

27. PERMITS AND FEES

Contractor will procure all permits, licenses, and pay all fees associated with the performance of the services and the Contractor's obligations under this Agreement.

28. NEW MEXICO TORT CLAIMS ACT

No provision of this Agreement will modify or waive the sovereign immunity or limitation of liability enjoyed by County or its public employees at common law or under the New Mexico Tort Claims Act, NMSA 1978, Section 41-4-1.

29. CAMPAIGN CONTRIBUTION DISCLOSURE

The Contractor must complete and submit simultaneous with signing this Agreement, the Santa Fe County Campaign Contribution Disclosure form.

30. SURVIVAL

The provisions of the following paragraphs will survive termination of this Agreement: Indemnification, Records and Inspection; Release; Confidentiality; and Choice of Law.

The parties execute this Agreement as of the date of last signature by the parties.

SANTA FE COUNTY



Gregory S. Shaffer
Santa Fe County Manager

12/10/2025

Date

Approved as to form:

Roberta D. Joe for W.B.

Walker Boyd
Santa Fe County Attorney

12/9/2025

Date

CONTRACTOR – NEW MEXICO REENTRY CENTER

Natasha Garcia

Signature

Natasha Garcia, Executive Director
Print name and title

12/9/2025

Date

CONNECT SDOH Screen

updated 10/2023

Attachment A



Name: _____

Navigator: _____

Date: _____

LIVING SITUATION

1. What is your living situation today?

- ☐ I have a steady place to live
- ☐ I have a place to live today, but I am worried about losing it in the future
- ☐ I do not have a steady place to live (I am temporarily staying with others, in a hotel, in a shelter, living outside on the street, on a beach, in a car, abandoned building, bus or train station, or in a park)

2. Think about the place you live. Do you have problems with any of the following? (Choose all that apply)

- | | | |
|---|---|--|
| ☐ Pests such as bugs, ants or mice | ☐ Oven or stove not working | ☐ None of the above |
| ☐ Mold | ☐ Smoke detectors missing or not working | |
| ☐ Lead paint or pipes | ☐ Water leaks | |
| ☐ Lack of heat | | |

FOOD

3. Within the past 12 months, you worried that your food would run out before you got money to buy more.

- | | | |
|-------------------------------------|---|-------------------------------------|
| ☐ Often true | ☐ Sometimes true | ☐ Never true |
|-------------------------------------|---|-------------------------------------|

4. Within the past 12 months, the food you bought just didn't last and you didn't have money to get more.

- | | | |
|-------------------------------------|---|-------------------------------------|
| ☐ Often true | ☐ Sometimes true | ☐ Never true |
|-------------------------------------|---|-------------------------------------|

TRANSPORTATION

5. In the past 12 months, has lack of reliable transportation kept you from medical appointments, meetings, work or from getting things needed for daily living?

- | | |
|------------------------------|-----------------------------|
| ☐ Yes | ☐ No |
|------------------------------|-----------------------------|

UTILITIES

6. In the past 12 months, has the electric, gas, oil, or water company threatened to shut off services in your home?

- | | | |
|------------------------------|-----------------------------|---|
| ☐ Yes | ☐ No | ☐ Already shut off |
|------------------------------|-----------------------------|---|

CONNECT SDOH Screen

updated 10/2023



SAFETY

7. How often does anyone, including family and friends, physically hurt you?

☐ Never ☐ Rarely ☐ Sometimes ☐ Fairly Often ☐ Frequently

8. How often does anyone, including family and friends, insult or talk down to you?

☐ Never ☐ Rarely ☐ Sometimes ☐ Fairly Often ☐ Frequently

9. How often does anyone, including family and friends, threaten you with harm?

☐ Never ☐ Rarely ☐ Sometimes ☐ Fairly Often ☐ Frequently

10. How often does anyone, including family and friends, scream or curse at you?

☐ Never ☐ Rarely ☐ Sometimes ☐ Fairly Often ☐ Frequently

SUPPLEMENTAL QUESTIONS

11. Do you speak a language other than English at home?

☐ Yes ☐ No

12. If yes, what is the primary language you speak

☐ English ☐ Spanish ☐ Navajo ☐ Pueblo ☐ Other Language: _____

13. Do you want help finding or keeping work or a job?

☐ Yes, help finding work ☐ Yes, help keeping work ☐ I do not need or want help

14. How hard is it for you to pay for the very basics like food, housing, medical care and heating? Would you say it is:

☐ Very hard ☐ Somewhat hard ☐ Not hard at all

15. Do you have any sources of income?

☐ Yes ☐ No

CONNECT SDOH Screen

updated 10/2023



If "yes," what are your sources of income?

- | | | |
|--|---|---|
| ☐ Alimony or other spousal support | ☐ Social Security Disability Insurance (SSDI) | ☐ VA Non-Service-Connected Disability Pension |
| ☐ Business Income | ☐ Social Security Retirement/Survivors Income | ☐ VA Retirement Pension |
| ☐ Child Support | ☐ State-specific Cash Assistance | ☐ VA Service-Connected Disability Compensation |
| ☐ Earned Income (wages, salaries, tips, etc.) | ☐ State-specific Disability Income | ☐ Workers Compensation |
| ☐ Pensions and/or annuities | ☐ Supplemental Security Income (SSI) | ☐ Other Source |
| ☐ Private Disability Insurance | ☐ Temporary Assistance for Needy Families (TANF) | ☐ Name: _____ |
| ☐ Rental Income | ☐ Unemployment Insurance | |
| ☐ Retirement Account Distributions | | |

16. What is your total annual income? \$_____/year

17. If you are a student, what is your status?

- ☐ Student, full-time ☐ Student, part-time

18. What is the highest level of education you have achieved?

- | | |
|---|---|
| ☐ Less than a high school diploma | ☐ Bachelor's Degree* |
| ☐ GED/High School Diploma | ☐ Master's Degree* |
| ☐ Some College, No Degree* | ☐ Professional Degree/Doctorate* |
| ☐ Trade/Technical/Vocational Training* | Focus of Degree/Doctorate: _____ |
| ☐ Associate's Degree* | |

19. Do you want help with school or training? For example, starting or completing job training or getting a high school diploma, GED or equivalent.

- ☐ Yes ☐ No

20. How many children live with you in your household?

if 0, go to Q23

- ☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10+

CONNECT SDOH Screen

updated 10/2023



21. Do you need child care now or in the next 6 months?

if yes, go to Q22

if no, go to Q23

☐ Yes

☐ No

22. Please select the childcare need for any of the following:

☐ Infants (birth - 12 months)

☐ Toddlers (1 - 2 years)

☐ Pre-school (3 years)

☐ Pre-K (4 - 5 years)

☐ Before/after school care for school aged children

23. If for any reason you need help with day-to-day activities such as bathing, preparing meals, shopping, managing finances, etc., do you get the help you need?

☐ I don't need any help

☐ I get all the help I need

☐ I could use a little more help

☐ I need a lot more help

24. How often do you feel lonely or isolated from those around you?

☐ Never

☐ Rarely

☐ Sometimes

☐ Fairly Often

☐ Frequently

25. In the last 30 days, other than the activities you did for work, on average, how many days per week did you engage in moderate exercise (like walking fast, running, jogging, dancing, swimming, biking, or other similar activities)?

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

☐ 6

☐ 7

26. On average, how many minutes did you usually spend exercising at this level on one of those days?

☐ 0

☐ 10

☐ 20

☐ 30

☐ 40

☐ 50

☐ 60

☐ 90

☐ 120

☐ 150 or greater

The next questions relate to your experience with alcohol, cigarettes, and other drugs. Some of the substances are prescribed by a doctor (like pain medications), but only count those if you have taken them for reasons or in doses other than prescribed. One question is about illicit or illegal drug use, but we only ask in order to identify community services that may be available to help you.

CONNECT SDOH Screen

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27. During the past 30 days, how many days per week or per month did you have at least one drink of any alcoholic beverage such as beer, wine, a malt beverage or liquor? One drink is equivalent to a 12-ounce beer, a 5-ounce glass of wine, or a drink with one shot of liquor?

_____ days per week _____ days in the past 30 days ☐ No drinks in the past 30 day

28. Considering all types of alcoholic beverages, how many times during the past 30 days did you have [5 for men/4 for women] or more drinks on an occasion?

_____ number of times ☐ None ☐ Don't know/Not sure

29. How many times in the past 30 days have you used tobacco products (like cigarettes, cigars, snuff, chew, electronic cigarettes)?

☐ Every day ☐ Some days ☐ Never

30. How many times in the past 30 days have you used prescription drugs for non-medical reasons?

☐ Every day ☐ Some days ☐ Never

31. How many times in the past 30 days have you used illegal drugs?

☐ Every day ☐ Some days ☐ Never

32. Do you have any kind of health care coverage, including health insurance, prepaid plans such as HMOs, or government plans such as Medicare or Indian Health Services?

☐ Yes ☐ No ☐ Don't Know

If "Yes," what insurance do you have:

☐ Medicaid	☐ Indian Health Service	☐ Other that I pay for myself
☐ Medicare	☐ Other through my employer	Name: _____
☐ Veterans Administration	Name: _____	

Name: _____**Navigator:** _____**Date:** _____

Has the Program Evaluation Consent Form been signed and uploaded?

☐ Yes☐ No

If not, please ask for the individual for verbal assent to evaluate the community-wide impact of CONNECT.

Navigator script: *"We hope to grow to meet the needs of all residents of Santa Fe City and County over time. To do that we need to prove the value of CONNECT. One of the ways we do that is by helping residents like you - and you can help spread the word about our good work to people you know. Another way to prove value is by completing an evaluation that shows that when CONNECT provides community members with the assistance they need now it saves emergency, hospital, medical and jail costs later. You can help us prove that."*

(Note: Medical information from the New Mexico Health Information Exchange is protected by state and federal privacy laws and will not be made public and will not be shared with any other state, county or federal agencies.)

Assent:

"Will you allow Santa Fe County to electronically access health information and any records maintained by city or county public safety agencies in Santa Fe, to be used ONLY to evaluate the community-wide impact of CONNECT?"

☐ Yes☐ No

1. Would you in general say that your health is:

☐ Excellent ☐ Very Good ☐ Good ☐ Fair ☐ Poor

2. Now thinking about your physical health, which includes physical illness and injury, for how many days during the past 30 days was your physical health not good?

☐ _____ number of days ☐ None

3. Now thinking about your mental health, which includes stress, depression, and problems with emotions, for how many days during the past 30 days was your mental health not good?

☐ _____ number of days ☐ None

4. During the past 30 days, for about how many days did poor physical or mental health keep you from doing your usual activities, such as self-care, work, or recreation?

☐ _____ number of days ☐ None ☐ N/A

5. Have you been in the hospital (in the last 30 days)?

☐ No ☐ Don't Know or refused

☐ Yes

If yes, when were you discharged? _____

6. Have you been in the ER (in the last 30 days)?

☐ No ☐ Don't Know or refused

☐ Yes

If yes, when were you discharged? _____

7. Have you been in jail/detention (in the last 30 days)?☐ No☐ Don't Know or refused☐ Yes

If yes, when were you discharged? _____

8. Has your phone number, email or home address changed since the last time we spoke?☐ No☐ Yes, *update client's FaceSheet*

Attachment B



COMMUNITY
is our Greatest Resource

CONNECT Navigation Standards & Protocols

A SANTA FE COUNTY + CITY OF SANTA FE
COMMUNITY PARTNERSHIP

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“The Accountable Health Community (now referred to as CONNECT) respects the people of Santa Fe City and County, serving the community with compassion and resourcefulness, creating a network of trust to effect health and well-being for all.”

-Value Statement developed by navigators 7/24/18

INTRODUCTION

CONNECT is a network of navigators at clinics, hospitals, schools, community service organizations and city and county programs that link individuals to the available services and resources. Santa Fe City and Santa Fe County recognize the need to address Social Determinants of Health (SDOH) which impact health outcomes for residents. The World Health Organization defines social determinants of health as “the conditions in which people are born, grow, work, live, and age, and the wider set of forces and systems shaping the conditions of daily life.” Social determinants include access to health care, housing, healthy food, transportation, and other social and material supports.

CONNECT started as an Accountable Health Community at Santa Fe County in 2017 and was funded by the County for the first two and a half years. In July of 2019, the Community Services Departments of Santa Fe County and City of Santa Fe partnered to expand the network by adding additional organizations and creating a leadership team. The name was changed to CONNECT in March of 2020, as a result of facilitated discussions with stakeholders in the community.

CONNECT is based on the Accountable Health Community (AHC) model developed by the Centers for Medicare and Medicaid Services (CMS). In an effort to align with national trends, CONNECT has tailored the CMS Social Determinant of Health Screening tool to screen individuals for their social needs. Every CONNECT navigator utilizes this screening tool which ensures standardization within the network. The Accountable Health Community Model puts the individual seeking services or resources at the center of care and aligns their care coordination amongst multiple providers. Service providers work together, provide the needed services, and support the individual in addressing the root causes of the issues they are facing.

CONNECT uses an “any door” philosophy, which allows an individual to access network providers either in person, via submission of online referrals or by calling 211. Individuals seeking services are screened for needs and appropriate referrals are made to providers within the network. For CONNECT, navigation is considered more than providing a phone number or resource directory. Navigation is walking alongside an individual to ensure they are connected to the resources or services they are seeking. Navigation includes, but is not limited to, establishing rapport, identifying and understanding the individual’s needs, prioritizing those needs, working with the individual to establish a plan to address emerging issues (via a navigation plan), completing necessary documentation (i.e. applications, letters, and other documentation), and ensuring the individual receives the services or resources they are seeking.

To support the network, Santa Fe City and County Community Services Departments fund some community organizations for the delivery of navigation services. These services are provided to address factors that influence health by linking residents to goods and services to address their unmet needs. Evaluated benchmarks include reductions in jail recidivism, emergency department utilization and hospitalizations and improvement of individual and population health outcomes.

The vision and goals of CONNECT are:

Vision:

All City and County residents regardless of income have access to high-quality health care and are linked to the resources they need for health and well-being.

Goals:

- Participants and providers collectively identify problems and co-create solutions.
- Navigators link participants to resources within a cohesive provider network.
- Social, economic, and physical environmental resources are available to all Individuals who reside in Santa Fe.
- Information systems are coordinated. Data is collected, monitored and evaluated to improve services and population health while reducing health care costs.

Eligibility differs based on whether a partner organization is contracted by the City or County. All CONNECT Navigators should be following the most up to date HUD income limits and should be providing services to individuals who reside in Santa Fe County.

Santa Fe 2025 income limits are as follows:

PERSONS IN FAMILY	1	2	3	4	5	6	7	8
80% LOW INCOME LIMITS	55,750	63,700	71,650	79,600	86,000	92,350	98,750	105,100

[HUD Income Limit](#)

City of Santa Fe funded agencies provide navigation and/or safety net services to individuals who reside within the City and should follow the most recent HUD income limits.

Santa Fe County funded agencies provide navigation services to individuals who reside in Santa Fe County who also qualify for the Santa Fe County Health Care Assistance Program. Eligibility is based on financial status as required by Santa Fe County Resolution No. 2014-47 (Resolution 2014-47).

Santa Fe County funded agencies also have access to Flexible Funds to purchase or pay for approved items an individual may need to avert a crisis or support with an unmet need. Flexible

Funds serve as a payor of last resort for emerging and emergency needs. A list of approved expenditures is found in **Exhibit A** of this document.

Navigators should review and reference the most recently updated CONNECT Navigation Standards & Protocols to ensure they are following the guidelines and meeting the expectations set forth for CONNECT navigators.

CONNECT navigators should also be utilizing the Unite Us (UU) closed loop referral management platform to make inter and intra-agency referrals. Utilization of the Unite Us platform facilitates a collaborative approach to addressing the health and social needs of the individuals being served. Utilization of the same closed loop referral platform fosters a responsive network, prevents duplication of services, streamlines efforts, increases reach and encourages providers to work together to provide resources to address health related needs.

MEET CONNECT

The CONNECT Network has grown significantly in the past eight years. The network started in July of 2017 with thirteen navigators from eight organizations. Today the network has over 300 navigators representing more than 80 community programs.

A foundational goal of CONNECT is to include more organizations and create a larger and more cohesive provider network for the community. In July of 2019, Santa Fe County partnered with the City of Santa Fe and an additional thirteen organizations, and twenty additional navigators joined CONNECT. As a response to the COVID-19 pandemic, additional City and County funded organizations joined the network to provide short term navigation and Flexible Funds for COVID-19 related needs. City and County youth funded organizations and navigators joined the network in 2020 and La Sala Crisis Center joined in 2021. Presbyterian Healthcare Services, Bienvenidos Outreach, Life Circle Adult Day Center, and Presbyterian Medical Services are the latest to join CONNECT.

A public facing self-referral portal is available on both the City and County's websites. The self-referral portals allow individuals to refer themselves or others into CONNECT. CONNECT Hub navigators, which consist of both City and County navigators, respond to the submitted referrals. Referrals can also be made via phone by calling 211 (505-245-1735). Bilingual navigators respond to incoming calls and can provide contact information or navigate individuals to requested services or resources. The self-referral portals can be accessed via the [Santa Fe County](#) or [City of Santa Fe](#) websites.

Through CONNECT, the City and County work to align contracts, streamline protocols, and standardize the care coordination and navigation network which has been established in the community. The shared common vision has allowed Santa Fe to serve as a role model for others who are interested in replicating CONNECT in their communities.

NAVIGATION

For CONNECT, navigation is defined as walking alongside an individual to ensure they are connected to the resources or services they are seeking. Navigation includes, but is not limited to, establishing rapport, identifying and understanding the individual's needs, prioritizing those needs, working with the individual to establish a plan to address emerging issues (via a navigation plan), completing necessary documentation (i.e. applications, letters, and other documentation), and ensuring the individual receives the services or resources they are seeking.

Three levels of navigation are funded by the City or County and responsibilities vary in each tier.

Tier I focuses on safety net service delivery. Tier 1 navigators provide individuals with items such as food, clothing, hours of counseling, etc. and may close referral loops. Tier I funded organizations are encouraged to attend monthly navigation meetings and must fully participate in collaborating with other agencies.

Tier II focuses not only on safety net service delivery and closing referral loops, but also on screening and providing navigation services. Tier II navigators will screen for needs, connect individuals to safety net services, and navigate individuals to other services. Tier II navigators should attend monthly navigation meetings and fully participate in collaborating with other agencies.

Tier III focuses on providing services other than navigation. Organizations are required to allow a city, county or partner agency navigator to be present if a need arises or participate in events for outreach and to collaborate when appropriate.

Tier II navigators have licenses to use the Unite Us platform to make and send referrals. The Unite Us platform captures the referrals and cases created for individuals served and aligns data collection and reporting of needs, cases and referrals made in Unite Us.

A **CONNECT Digital File** is sent to all new navigators upon successful completion of a New Navigator Orientation. This file is also sent to the CONNECT network once the documents within the digital file have been updated for that year. The CONNECT digital file includes CONNECT Navigation Standards & Protocols, CONNECT Screening tools (Social Needs and Evaluation) and other supplemental information for navigators. The digital file is not intended to supplant the Unite Us platform but to offer navigators a hard copy option in the event internet access is unavailable or unstable when providing navigation services. Any documentation noted outside of Unite Us should be uploaded or entered into Unite Us in a timely manner.

JOINING CONNECT

Organizations interested in joining CONNECT are vetted to ensure they will be a good addition to the network. An initial meeting will be requested where the interested organization will receive an overview of CONNECT and discuss the capacity of the organization to send/receive referrals.

A CONNECT application must be submitted which identifies information about the organization's legal status (for profit, non-profit, government entity); services provided; populations served; and other relevant information. Upon review of the CONNECT application, if accepted to the network, the organization will begin Unite Us onboarding and training.

Interested organizations should contact the following to join CONNECT :

COUNTY: Coy Maienza, cmaienza@santafecountynm.gov

CITY: Christa Hernandez, chernandez@santafenm.gov

STANDARDS FOR NETWORK BEHAVIOR

Through the implementation of the Unite Us platform, the CONNECT network of navigators agree to operate within the following network standards. Network standards are critical to promoting strong, open and timely communications and data security as well as ensuring accurate data collection. CONNECT Navigators agree to respond to referrals within the recommended timeliness guidelines defined in these standards and protocols. The standards and protocols also address keeping organizational data up to date, entering individual data in a timely manner, maintaining individual records related to services and outcomes, and closing the loop of each referral.

The Unite Us platform links CONNECT In-Network providers (those organizations whose navigators have licenses to utilize UU) and assists navigators in accessing resources by responding and/or referring to services with network providers (both In and Out-of-Network) across Santa Fe County. The UU platform enhances the work of navigators and supports consistent data collection of social determinants and related outcomes.

The UU platform provides a user-friendly platform which allows navigators to screen individuals to identify their needs, submit and respond to referrals, identify appropriate resources, track the status of referrals, and identify outcomes. CONNECT partners and programs can analyze the data and outcomes generated through UU, which can help to identify gaps in services and emerging needs.

Unite Us Organization Profiles

All In-Network organizations and programs are responsible for maintaining and updating the information in their Unite Us organization profiles. In-Network Providers should review organization profiles in UU once a month to ensure the following information is up to date:

1. Services provided
2. Whether specific items should be included as part of the referral
3. If there are required criteria or qualifications for any service (income, residency, veteran status, etc)
4. Hours of service
5. If following winter/summer/holiday hours

6. Address
7. Contact information

Unite Us Organization Administrators should access the Organization settings within Unite Us to update the organization profile and program descriptions. Referrals should be toggled off for specific programs if the organization is at capacity and unable to accept additional referrals. Referrals should also be turned off if the organization closes for winter, summer break or for extended holidays. To ensure the health of the network, Santa Fe City and County staff will reach out to In-Network Providers who are non-responsive to referrals or who have a long waitlist of pending referrals.

Unite Us User Licenses

New navigator(s) can be added as new users to the Unite Us platform once they have taken the CONNECT required trainings noted on page 13. Every navigator must have their own user license which will be synced with their unique log in and password. Each user license has individually designated privileges that dictate what the user can see and do in the UU platform. *Licenses cannot and should not be shared by navigator(s).* Ensuring all navigators have their own user license is critical to maintaining data security and ensuring all CONNECT partner organizations are being HIPAA compliant.

If a navigator leaves an organization or no longer needs access to the Unite Us platform, it is the responsibility of the Unite Us Organization Administrator to edit the user settings and deactivate the navigators Unite Us license. Deactivation should occur as soon as access is no longer needed.

Data Standards

In becoming a CONNECT partner organization, the organization and the navigator(s) at the organization agree to:

- Ensure duplicate client face sheets are not created.
- Ensure test clients are not created.
- Ensure when new client records are created, the name used will be from the individual's identification card or driver's license (no nicknames should be used).
- Obtain as much contact and demographic information as possible.
 - o Do not ask for or include social security numbers on client face sheets.
- Review completed screenings to ensure they are current or complete new screenings prior to making referrals.
 - o The responses from the screenings should guide the referrals.
- Ensure case notes are professional, document the encounter(s), and are updated throughout the navigation journey.
- Ensure case notes do not include Personal Identifying Information (PII) or Protected Health Information (PHI) (secondhand Social Security number, Driver's License number, address, medical diagnosis, treatment information, Rx etc.).

- Ensure navigation plans are completed for individuals served.
- Ensure cases are closed when an individual has received the requested services.

ENROLLMENT

Enrollment in CONNECT may occur at any CONNECT partner organization, via submission of a self-referral on the City or County's CONNECT website, or by calling 211. CONNECT Hub navigators respond to self-referrals submitted online and can enroll individuals who are self-referring into CONNECT.

To be enrolled in CONNECT, the individual must:

1. **Request assistance** to address an unmet SDOH
 - a. Assistance can be requested at a CONNECT partner organization, via submission of a self-referral on the [City](#) or [County's](#) CONNECT website, or by calling 211 (505-245-1735)
2. **Screen positive** for any of the Social Determinants of Health on one of the CONNECT screening tools
3. **Provide consent** via Unite Us for their information to be entered into the platform
 - a. If an individual does not consent for their information to be entered into Unite Us, the enrolling organization should still complete the CONNECT screenings. Referrals should be made via phone or email. Hard copies of the screenings should remain on file with the organization providing the navigation services.
4. **Reside** within Santa Fe County

To identify whether a client record exists in Unite Us, the navigator should click on the tab to create a new client and enter the individuals first name, last name and date of birth. If a record is found, the navigator should identify whether there are up to date screenings. The navigator will either need to re-screen or use the current screenings to make appropriate referrals. If a client record does not exist, the navigator should create one and complete the CONNECT Social Needs and CONNECT Evaluation screening tools to make appropriate referrals.

The individual will also be asked for their consent for the following:

1. **Consent for program evaluation:** The consent grants permission for the individual's information to be accessed and reviewed by program evaluators. The individual's information will be protected by state and federal privacy laws, will not be made public, and will only be used to evaluate the impact of CONNECT.
2. **Assent for program evaluation:** The assent grants permission for CONNECT to access the individual's health information to evaluate the community wide impact of CONNECT. Information will be obtained from Synchrony (New Mexico's Health Information Exchange) to review medical information which is protected by state and federal privacy laws, will not be made public, and will only be used to evaluate the impact of CONNECT.

The CONNECT Evaluation Screening tool includes a script which should be provided to the individual to identify whether they grant permission to use their health information for the purpose of evaluating CONNECT. Collected information is not identifiable at the individual level. No identifying information at the individual level will be used or shared with any state, county, federal agencies. This information will not be made public.

Consent will be in effect until the individual withdraws permission in writing or opts out of Synchronys. If an individual does not want to provide their consent, navigation services should still be provided.

SCREENING

Screening may occur at any CONNECT partner organization, via submission of a self-referral on the City or County's CONNECT website, or by calling 211. CONNECT Hub navigators respond to self-referrals submitted online and can screen individuals who are self-referring into CONNECT.

The responses from the screenings should guide the navigation services being provided and the referral(s) being made. Navigators should review the client face sheet in Unite Us to identify if any screenings have been completed and confirm whether the completed screenings are still current. Reviewing this information helps to prevent over-screening the individuals being served.

Individuals are screened by navigators to identify unmet Social Determinants of Health. The CONNECT required screenings should be completed via the following cadence:

- **CONNECT Social Needs Screening:** upon enrollment and completed every 12 months or whenever a life-changing event occurs thereafter.
- **CONNECT Evaluation Screening:** upon enrollment and completed at a minimum every 3 months thereafter.

The **CONNECT Social Needs Screening** tool identifies the unmet social determinants of health needs the individual is facing. The **CONNECT Evaluation Screening** tool inquires about jail and ER visits which is information used for CONNECT program evaluation.

Navigators are encouraged to use their discretion when screening individuals. Some questions within the screening tools may trigger individuals who are already in crisis. When providing navigation services, establishing rapport and ensuring the individual is comfortable and feels safe when responding is important.

Electronic versions of the CONNECT Social Needs Screening and Evaluation Screening tools are available in English and Spanish and are included in the CONNECT Digital File.

The following Social Determinants of Health (SDOH) questions were added to the CONNECT Social Needs Screening tool in 2018 and 2019:

Safe Housing
Access to Nutritious Food

Reliable Transportation
Personal Safety

Reliable Utilities

Additional Social Determinants of Health questions were added in 2020 to address:

Finances
Education
Mental Health

Employment
Physical Activity
Disabilities

Family/Community Support
Substance Use

The above additional SDOH questions are supplemental and are not mandatory. The supplemental questions should be asked at the discretion of the navigator.

REFERRAL PROCESS AND RESPONSE STANDARDS

Upon completing the required screenings, Unite Us will provide suggestions for possible referrals. The navigator can select the suggested referrals or can send referrals to other organizations. Since Unite Us is a closed loop referral platform, all referrals are submitted electronically to the identified In-Network providers.

Out of Network Referrals

If a referral is made to an Out-of-Network Provider, it is the responsibility of the Navigator to create a case in Unite Us and make the referral via phone or email. The navigator should follow up with the individual to ensure they were connected with the requested service or resource; enter notes to track the communications had with other providers and the individual; and close the case when the need has been met. The navigator should maintain the same timelines and standards that are expected of In-Network referrals.

The expected response time In-Network providers must respond to a referral is within two (2) business days. In-Network providers have multiple options when responding to a referral.

The referral status within Unite Us should indicate one of the following:

1. **Accept:** Should be selected if the referral is accepted by the provider. This selection indicates they have agreed to serve the individual.
2. **Hold for Review:** Should be selected if the provider needs additional information or is working to identify if they have the capacity to serve the individual. This selection lets other organizations know they have seen the referral and are working to identify if they can accept or reject the referral.
 - a. Referrals on hold for review should only be on hold for up to two (2) business days.
3. **Reject:** Should be selected if the provider is rejecting the referral. When the referral is rejected, it will be routed back to the navigator who sent the referral. It then becomes the responsibility of the sending navigator to identify a different provider and make another

referral or, if all other options have been explored, notify the individual seeking the service that the service they are seeking is unavailable and assist them in exploring other options.

4. **Refer On/Send:** Should be selected if the provider cannot accept a referral but knows of another provider who may be able to assist or be a better fit for the resources or services that are requested. This selection can be made and will send the referral to another provider.
 - a. The provider who is forwarding the referral should make case notes about the reason for the referral being sent to another provider.
 - b. If the referral is still pending being accepted after two (2) business days, the sending navigator should contact the provider to check on the status of the referral. If the provider cannot be reached within three (3) business days, the sending navigator should recall the referral and send it to a different provider.
5. **Close Case:** Should be selected if the services or resources have been provided; if the individual is no longer responding to emails or phone calls; or if the individual no longer needs assistance.

Unresponsive Individuals

Navigators should attempt to contact individuals seeking services a minimum of three times over the course of one week. The navigator should reach out via every method provided (phone, email, text). If the individual has not responded after ten (10) days and a minimum of three contact attempts have been made, the navigator can close the referral. The navigator should close the case and note the status as “unable to contact”. The individuals’ record will remain in Unite Us and can be accessed again in the future if they request services.

Closing Cases

Navigators should regularly review and monitor the cases of the individuals they are serving. Regular check-ins and case notes should be updated after each communication. The navigator should close cases if the services or resources have been provided; if the individual is no longer responding to emails or phone calls; or if the individual no longer needs assistance. A case can always be re-opened if additional needs are identified in the future.

Outcomes

Navigators should select and capture the appropriate outcome(s) when closing a case in Unite Us. A drop-down list is available in Unite Us which includes several options to choose from. This information is required to close a case. Navigators should avoid closing the case with the outcome of “other”. This selection should only be utilized if none of the existing categories are suitable, and with rare circumstances.

NAVIGATION PLAN DEVELOPMENT

A **Navigation Plan** is a tool designed to identify the root cause of SDOH challenge. It allows the navigator and individual seeking services to co-create solutions and it assists individuals with identifying and accessing appropriate resources and support services. A Navigation Plan is

required for individuals who are receiving navigation services. The Navigation Plan includes measurable goals based on the individual's priorities and is generated by the CONNECT Social Needs Screening tool results and/or referrals generated by Unite Us. Navigators should have a conversation with the individual to explain the purpose of the Navigation Plan and discuss the priorities they would like to address first.

The Navigation Plan identifies priorities, the primary navigator conducting the intake, and the care/navigation team. The care team includes navigators from CONNECT partner organizations who are providing resources and services to the individual.

Every CONNECT navigator should be creating navigation plans for the individuals they are working with. Tier 1 navigators are also encouraged but not required to develop a Navigation Plan. Navigation plans should be completed and uploaded onto the Unite Us platform within 30 days of enrollment. Training for navigation planning is provided by CONNECT on an annual basis.

The Navigation Plan should include the following components:

- Name of primary navigator and organization developing the plan
- Measurable goals
- Signatures of the individual and the primary navigator (if the plan is completed in person)
- Date of plan development
- Review date for the Navigation Plan

Goals will follow the SMART model of being Specific, Measurable, Achievable, Relevant and Time-bound.

1. **Specific** - Consider who, what, when, where, why and how in developing the goal.
2. **Measurable** - Include a numeric or descriptive measurement.
3. **Achievable** - Consider the resources needed and set a realistic goal.
4. **Relevant** - Ensure the goal is results focused and links with the mission.
5. **Time-bound** - Set a realistic deadline.

CONNECT partner organizations may use the CONNECT Navigation Plan or their organization's navigation plan if the above plan components are included. A Navigation Plan template is available in the Unite Us platform and can be accessed via the forms tab. A completed plan should be uploaded to the platform and a copy should be provided to the individual.

NAVIGATION MONTHLY MEETINGS

To strengthen communication, foster a strong navigation network and increase navigation knowledge, navigation meetings are offered on the fourth Tuesday of every month for 1 hour. CONNECT navigators should create a calendar hold to reserve the time for upcoming meetings. All meetings are virtual, except for the June meeting which is in person. There is no meeting in December. **Attendance is required for every CONNECT partner organization.**

The following agenda items are consistent elements of the monthly meetings:

- *Introductions and Updates:* Given the continued growth of the network, introductions and updates provide the latest information about new attendees, and recent organizational and network changes.
- *Educational Series- Education, Resources and Professional Growth:* Topics include learning about resources that address social determinants of health, best practices and educational opportunities for professional growth.
- *Networking:* Time to network is built into face-to-face meetings.

CONNECT REQUIRED TRAININGS

To ensure CONNECT Navigators are adhering to the same standards, all new Navigators are required to participate in the following required trainings prior to obtaining a Unite Us user license:

1. [CONNECT New User + Refresher training](#)
 - A one-hour training on the Unite Us platform that supports CONNECT. The training is provided by the Unite Us team and takes place on the **1st Wednesday of the month at 1pm.**
2. [New Navigator Orientation](#)
 - A one-hour orientation on CONNECT and the resources available to new navigators. This orientation is provided by Jennifer and Christa and takes place on the **2nd Tuesday of the month at 11am.**
3. [CONNECT Payments Refresher training](#)
 - A one-hour training on the Unite Us platform which shows how contracted agencies should bill for navigation services. The training is facilitated by the Unite Us team and takes place on the **2nd Wednesday of the month at 1pm.**
 1. The Unite Us Payments training is only required if the new navigator will be submitting invoices for navigation services as part of a City or County contract.
 2. To request to add new navigators to the payments feature, please complete [this form.](#)

Once the new navigator has completed the required trainings, the Unite Us Organization Administrator can add the new navigator into the platform as a new user which will grant them a Unite Us user license.

PROFESSIONAL DEVELOPMENT

The CONNECT leadership team is committed to providing ongoing professional development to strengthen and expand navigators' skill sets. Topics are based on suggestions from navigators and Continuing Education Units (CEU) will be available for completed trainings. All trainings will be provided by Mikahla Beutler, LPCC. Emails will be sent out with information about each training and registration information one month prior to the training date. Below is a listing of possible

trainings that may be offered throughout the year. Trainings may be offered either virtually or online.

Trauma-Informed Care

This course on Trauma-Informed Care is designed as a broad overview of best practices in recognizing, assessing, and treating trauma. This includes a review of SAMHSA's TIP 57, an exploration into countertransference and self-regulation, and an opportunity for resource development. A didactic teaching method will be the main source of content with the opportunity for experiential and collaborative engagement. This course provides 3 continuing education credits. Participants must attend the entire course to receive a certificate.

Building Resilience

This experiential course on Building Resilience is designed to offer providers a personal practice in self-care and burnout prevention. This includes many self-regulatory practices that can be applied in work with clients. Participants will leave feeling refreshed and renewed, as well as retooled. Experiential learning will be the main methodology of content delivery with the opportunity for collaborative, and inquiry-based discovery. This course provides 3 continuing education credits. Participants must attend the entire course to receive a certificate.

Shared Decision-Making in Treatment Planning

This course on Treatment Planning will focus on the shared decision-making model wherein providers and clients work together to form a course of action. Through psychoeducation, goal setting strategies, and tracking tools, providers and clients can monitor the successes and challenges of treatment. Inquiry-based teaching methodologies will have participants building appropriate treatment models for their specific practices. This course provides 3 continuing education credits. Participants must attend the entire course to receive a certificate.

Considerations for Effective Communication

This course on Communication is designed to examine a range of meta-communications and influences. Explorations in self-talk, communication styles, and effective communication techniques will offer participants strategies they can utilize with clients and coworkers alike. Highly experiential in nature, this course will have plenty of opportunities for practice! This course provides 3 continuing education credits. Participants must attend the entire course to receive a certificate.

CLINICAL GUIDANCE

CONNECT embraces person-centered planning and navigation services that support the person to identify and achieve their goals relating to unmet social determinants of health. Engaging individuals to participate in the network and navigation services can be difficult when working with individuals who have in the past or are currently experiencing trauma. Trauma is often unrecognized and is widespread. According to SAMHSA "trauma occurs as a result of violence,

abuse, neglect, loss, disaster, war and other emotionally harmful experiences. Trauma has no boundaries with regard to age, gender, socioeconomic status, race, ethnicity, geography or sexual orientation.”

Navigators work every day with individuals who are vulnerable and are most likely experiencing trauma if they have screened positive for the need for housing, transportation, utilities, food or personal safety. This puts navigators at risk of experiencing what is known as secondary trauma, which can lead to overwhelm and emotional burnout.

With a spirit of meeting individuals where they are both literally and figuratively, navigators must have a varied skill set. Navigators are not required to have a clinical background, nor are they necessarily supervised by clinicians. The complexity of challenges they face could benefit from a clinician’s guidance to create a safe environment for themselves and the individuals they serve. In order to mitigate the effects of secondary trauma, navigators may access additional support from CONNECT in the form of Clinical Guidance.

Navigators and their agencies may access individual support, team development facilitation, and clinical training through the CONNECT clinical guidance program. Clinical Guidance will be provided by a licensed professional. Topics and areas of interest may vary to include trauma-informed care, professional ethics, burnout prevention, individual engagement, person-centered planning and other identified areas of development. The provider will articulate, model, and mentor a standard of care for navigators. Clinical guidance and professional development activities may provide current practice standards, peer-to-peer engagement, debriefing of difficult situations, and personal support among other things. As part of the CONNECT orientation, each navigator is introduced to Ms. Beutler to learn more about ways to integrate self-care and clinical best practices into their work life.

Team Development, Meeting Facilitation, Case Consultation

To further support individual navigators and interdisciplinary team development, navigators may request the assistance of the clinician for phone consults, to facilitate interdisciplinary navigation meetings when the needs of the individual receiving services, or the dynamics of the team are complex. The clinician will also provide follow-up with individual team members to debrief and troubleshoot next steps in difficult situations.

Office Hours are available by appointment every Tuesday and Thursday from 9 to 11 am, or at a time that is mutually agreed upon, for individual Case Consultation. Please email requests to Mikahla Beutler with “Clinical Guidance Request” in the subject line. Ms. Beutler will respond by email within 48 hours of receipt of the request and can be reached at (505) 663-6464 or emergesantafe@gmail.com.

COMMUNITY ENGAGEMENT

CONNECT Leadership works to continually assess and improve CONNECT policies, standards, protocols and procedures. The lived experience of individuals who have received services or have been connected to resources via CONNECT is vital information.

In 2020, an Advisory Committee of individuals who had been or were enrolled in CONNECT was initiated and began meeting quarterly. The goal of the committee was to discuss and identify what was working, what areas needed improvement and how CONNECT could support local efforts to improve and influence public policy.

Participants for the Advisory Committee are accepted year-round. If interested in joining this committee, the name and contact information of the interested individual should be sent to both:

COUNTY: Coy Maienza, cmaienza@santafecountynm.gov

CITY: Christa Hernandez, chernandez@santafenm.gov

CONNECT Leadership encourages feedback from individuals served through CONNECT and from CONNECT navigators. Additional feedback is provided by Planning and Advisory Committee members, City of Santa Fe stakeholder and policy groups, Santa Fe County Health Policy and Planning Commission, the Board of County Commissioners and City Councilors.

FLEXIBLE FUND

A Flexible Fund is available to respond to an enrolled person's emerging or immediate crisis involving housing, transportation, utilities, access to food, personal safety, other unmet SDOH, and activities related to achieving the goals documented in a Navigation Plan. Santa Fe County funded agencies have access to Flexible Funds to purchase or pay for approved items an individual may need to avert a crisis or support with an unmet need. Flexible Funds serve as a payor of last resort for emerging and emergency needs. A list of pre-approved uses is provided in **Exhibit A**.

Other uses of Flexible Funds may be allowed with prior written approval by the contract managers for the City and County. Flexible funds are intended to serve as the *payor of last resort*, not to supplant other available funding sources. Flexible Funds can be used for one time or unique events. The navigator must be able to demonstrate how the issue is being addressed to prevent future requests for the same issue and this information should be documented in a navigation plan.

When distributing Flexible Funds, navigators are encouraged to exercise discretion and be innovative. To extend the available funds, navigators should seek community partners to donate or partially fund the purchase and encourage the individual requesting assistance to contribute as well, to the extent possible.

Any individual enrolled in CONNECT is eligible to receive Flexible Funds. There is no limit on the number of items or frequency per contract year of Flexible Funds that an individual may receive

except as specified in Exhibit A where expenditure caps are listed. An individual may not receive funds for the same item more than once from the same partner organization, and the navigation service cannot expend or commit more funds than are present in the account for Flexible Funds at the time of the request. There is a cap of \$25,000 per individual in their lifetime and caps on specific items are listed in Exhibit A. Exceeding caps on certain items may be allowed with prior written approval by the contract managers for the City and County.

A navigator may obtain an item with Flexible Funds and give it to the individual or accompany the individual and pay for an item with Flexible Funds. Flexible Funds cannot be given to the individual to pay for an item.

Flexible Funds cannot be used for any purpose not specified in these protocols. The disbursement of Flexible Funds is tracked in the Unite Us and can be completed by:

1. Go to the individuals Face Sheet and click on the “Profile” tab.
2. Scroll to the bottom of the page and select the blue plus sign to “Add Social Care Coverage”.
3. Select “Santa Fe CONNECT-FLEX, ARPA, Wellness, Navigation” as the Social Care Coverage.
 - a. The start date is the day that funding is being distributed.
 - b. The end date should be left blank.
4. Click on the “Cases” tab and select “create new case”.
5. Select “Santa Fe CONNECT - FLEX, ARPA, Wellness, Navigation” as the program and “emergency/one-time financial assistance” as the service subtype.
6. Fill out the primary worker, case description, and click “next” to create the case.
7. While in the open case, use the “Add contracted service” feature to document the flex funding that was distributed.
 - a. Be sure to include the reason for distribution and the date the funding was distributed.
 - b. The Navigator can add multiple contracted services in one case if funding was provided to the individual for multiple needs
8. The case can be closed as resolved once all funds have been distributed.

A flex fund invoice must be submitted and approved by the In-Network Provider and must then be submitted to the Network Leads for approval and payment. Receipts must be uploaded onto the platform and correspond with the invoice submitted. The receipt must be titled with the name of the individual, the date and the service category of the expenditure and uploaded within the reporting term that the purchase is made. Best practice for documenting Flexible Fund expenditures is within 24 hours.

It is the responsibility of each organization to review these protocols regularly. Terms are subject to change. Reimbursement of Flexible Funds will not occur if items purchased are not listed on **Exhibit A** or without prior written approval by the contract managers for the City and County.

If you have any questions regarding this policy, contact:

COUNTY: Coy Maienza, cmaienza@santafecountynm.gov

CITY: Christa Hernandez, chernandez@santafenm.gov

PATHWAYS TO SUCCESS

The following steps or pathways addressing housing, food, transportation, utilities and personal safety are guides created by navigators to successfully address each domain and may help in navigation planning.



Step 1. Develop a relationship with the individual. Document history of homelessness, medical and behavioral health needs if any need to be addressed while seeking emergency, short (30 day) and long-term housing options.

Step 2. Identify what programs the individual or family may qualify for. Review housing resources at the local and federal level that include veteran, senior and low-income housing options. Some vouchers for permanent supportive housing only become available if a person is chronically homeless (a documented period of one year within the last three years).

If the person and/or family screen positive for a housing need make a referral to an appropriate organization. Check with resources in surrounding counties if housing vouchers are available. Identify potential barriers to housing. Identify whether the individual has previous evictions, legal or medical issues, and if they have an identification card.

Step 3. Collect documents which may include: identification, credit history, income status, bank statements. Provide assistance with applications and prepare the individual for appointments and interviews. Make copies of documents for the individual and for organization files, following organization policies for file storage.

Step 4. Navigator and individual should contact appropriate organization(s), schedule an appointment, meet and discuss housing options. Navigator should confirm that the individual attended the identified appointment and has at the very least been put on a waiting list for housing and/or has had their immediate housing crisis resolved.

Step 5. Navigator should maintain contact throughout the application process and schedule regular appointments to check in while the individual is on waiting lists. Navigator should provide follow-up for a year to ensure the housing voucher renewal is completed (if relevant) within the correct time frame, rent is paid, and property is maintained.

Step 6. Anticipate and develop goals to address emergency, interim and long-term options for housing and document within the Navigation Plan.

Flexible Funds can be used for:

- Rent (up to 3 months per calendar year)
- Sleeping mat
- Sleeping bag
- Mold remediation
- Pest removal
- Housing repairs, appliance replacement or safety modifications related to plumbing and water leaks, electrical, heat, oven, hot water heater, smoke detectors or grab bars (\$2,000 max)
- Fees for identification needed to obtain housing
- Hotel (up to 3 months per calendar year)

Flexible funds **cannot** be used for:

- Security Deposit
- Tent

Final Step: The pathway is completed when the individual is housed with adequate support services for 3 months.



FOOD

Step 1. Develop a relationship with the individual. Assess the need and possible solutions for immediate and long-term access to healthy food. Navigator should talk with the individual about programs they may be eligible for and use the Unite Us Platform to make referrals and share in-network food resources. The SHARE New Mexico resource directory can be printed and other resources should be discussed (i.e. SNAP, WIC, food distribution sites, prepared meal delivery services and drop-in meal sites). Please note: citizen status can exclude individuals from being eligible for certain services. Navigator should identify available options for individuals who are deemed ineligible.

Flexible Funds can be used for:

- Groceries
- Hot meal
- MoGro membership
- Baby formula
- Breastfeeding supplies
- Prenatal vitamins

- Fees for identification needed for SNAP application
- Grocery card (identification required for use)

Step 2. Navigator should assist with completing the application and/or in-person or phone interview with the state departments if the individual is eligible for SNAP or WIC benefits.

Step 3. Navigator should explore and identify all possible food distribution, meal sites and how to access them with local transportation options. Navigator should provide a referral to any programs with specific age or health requirements.

Step 4. Navigator should accompany the individual to their first visit receiving services at a CONNECT partner organization or state agency. Best practice is providing a warm hand-off if the agency policy permits.

Step 5. Navigator should check-in with the individual to assess progress and barriers and document food goals within a navigation plan.

Final Step: The pathway is completed when the individual has reliably accessed healthy food resources for 1 month.



TRANSPORTATION

Step 1. Develop a relationship with the individual. Assess the transportation need and possible solutions for immediate and long-term transportation.

Step 2. Review public transportation resources that are applicable to the individual. Flexible Funds can be used as leverage for in-kind or private contributions if vehicle repair or parts are needed. Encourage the individual to pay whatever they can to contribute.

Flexible Funds can be used for:

- Bus pass
- Fuel for vehicles
- Uber and Lyft gift cards
- Fees for Driver's License or identification needed to obtain license
- Vehicle repairs and parts to keep vehicle roadworthy (\$1,500 max per vehicle)
- Car seat
- Vehicle insurance (up to 6 months)
- Bicycle parts and repair
- Gas card (identification required for use)

Step 3. Create goals in a Navigation Plan with the individual to address ongoing transportation needs. Identify transportation options that address immediate and long-term transportation.

Final Step: The pathway is completed when the individual has reliable transportation for 1 month.



UTILITIES

Step 1. Develop a relationship with the individual. Assess the need for assistance and eligibility and identify the personal and situational factors which led to the need.

Step 2. Navigator should work with the individual to identify if they qualify for Low Income Home Energy Assistance Program (LIHEAP). If eligible the Navigator should assist the individual in applying for the benefits available through the Health Care Authority. Navigator should assist the individual in preparing for a meeting with the referral agency, locate and copy required documentation, arrange childcare, secure transportation, review hours of operation, and request for previous bills from the utility company. Navigator should check-in and confirm that the individual attended the appointment and has a potential solution.

Step 3. If not eligible or LIHEAP is unavailable the Navigator should seek assistance from other organizations, including city and county resources

Flexible Funds can be used for:

- Pellets
- Firewood
- Propane
- Fan
- Gas, Electric, Water Bill, Phone, Internet payment (up to 3 months)
- Flashlight
- Fees for identification needed to obtain utilities
- Smoke and Carbon Monoxide detectors

Step 4. Navigator should work with the individual to create and document goals in a navigation plan to address ongoing utility needs. Navigator should identify the root cause of the individual not having utilities; should work with the individual to identify whether life skills, budgeting, or other skillsets might assist the individual in preventing the situation from occurring again in the future; and whether any other supplemental programming might assist the individual (i.e. PNM's budget billing program, heating season shut-off protection).

Final Step: The pathway is completed when the individual secures and maintains utilities for 3 months.



INTERPERSONAL SAFETY

Step 1. Develop a relationship with the individual. Navigator should identify if there is a safety issue based on the responses provided on the CONNECT Social Needs Screening tool.

If yes, Navigator should assess immediate safety needs:

- If the individual is injured, Navigator should call 911.
- Identify where the person is who inflicted harm
- Identify whether there are children or others in danger.

Step 2. Navigator should research and identify resources depending on the unique needs of the individual and family. If the individual or family has an immediate safety need request to refer them to the Esperanza Shelter (800-473-5220). Navigator should ensure a warm hand-off that includes arranging or providing transportation to the emergency shelter coordinated with staff at the shelter.

Flexible Funds can be used for:

- Train, bus fare for safe destination
- Court fees such as filing fees for new birth certificate, social security card,
- ID/Driver's License
- Asylum application fee
- Fee for name change needed for safety

Step 3. Navigator should identify whether the individual wants to report the abuse to the police, should be familiar with mandatory reporting requirements, and should file a report if there is reasonable cause for neglect or abuse of a child or vulnerable adult.

Navigator should call the numbers below to ask a hypothetical question if there is doubt or concern about making a determination as to whether there is reasonable cause.

REPORTING CHILD NEGLECT AND/OR ABUSE: Any person must report if they “know or has a reasonable suspicion that a child is an abused or a neglected child.” New Mexico law allows confidential reports of child abuse and/or neglect to be made to a local law enforcement agency, the Children, Youth and Families Department (CYFD) Statewide Central Intake (855-333-7233) or a tribal law enforcement or social services agency for and Indian child residing in Indian Country. [NMSA section 32A-4-3 A]

REPORTING ADULT NEGLECT AND/OR ABUSE: New Mexico has a “Duty to Report” provision in the Adult Protective Services Act (27-7-30) which states: “Any person, or financial institution,

having reasonable cause to believe that an incapacitated adult is being abused, neglected or exploited shall immediately report that information to Adult Protective Services.”

If you suspect an adult is being abused, neglected, or exploited, call Adult Protective Services Statewide Intake, toll-free at **1-866-654-3219** or **1-505-476-4912**. Adult Protective Services remains on call for emergent reports of adult abuse, neglect, and exploitation 24 hours a day, 7 days a week.

Step 4. Navigator should provide contact information to the individual to encourage the continuation of navigation services and to create and identify goals to be documented in a Navigation Plan.

Final Step: The pathway is completed when the individual or family feels safe, free from abuse and sustains mental and physical health for one month.

TECHNICAL ASSISTANCE AND FEEDBACK

CONNECT is committed to improving the experience of all partners. Feedback helps tailor standards and protocols to the strengths and needs of our community and is encouraged and welcome.

For technical assistance while using the UU platform please use the chat feature to troubleshoot problems first or email [technical support](#). If there are issues that are unable to be resolved, please contact [Nicole Breske](#).

Feedback on Unite Us and Network Standards is welcome from all navigators and organization administrators at any time.

If you have questions or comments about the Unite Us platform or CONNECT please contact:

COUNTY: Coy Maienza, cmaienza@santafecountynm.gov

CITY: Christa Hernandez, chernandez@santafenm.gov

Quick Links:

[Enhanced Onboarding Form](#)

[Unite Us Login](#)

[CONNECT Resource Directory \(English\) and \(Spanish\)](#)

EXHIBIT A

HOUSING:

- Rent (up to 3 months per calendar year)
- Sleeping mat
- Sleeping bag
- Mold remediation
- Pest removal
- Housing repairs, appliance replacement or safety modifications related to plumbing and water leaks, electrical, heat, oven, hot water heater, smoke detectors or grab bars (\$2,000 max)
- Fees for identification needed to obtain housing
- Hotel (up to 3 months per calendar year)

TRANSPORTATION:

- Bus pass
- Fuel for vehicles
- Uber and Lyft gift cards
- Fees for Driver's License or identification needed to obtain license
- Vehicle repairs and parts to keep vehicle roadworthy (\$1,500 max per vehicle)
- Car seat
- Vehicle insurance (up to 6 months)
- Bicycle parts and repair
- Gas card (identification required for use)

UTILITIES:

- Pellets
- Firewood
- Propane
- Fan
- Gas, Electric, Water Bill, Phone, Internet payment (up to 3 months)
- Flashlight
- Fees for identification needed to obtain utilities
- Smoke and Carbon Monoxide detectors

FOOD:

- Groceries
- Hot meal
- MoGro membership
- Baby formula
- Breastfeeding supplies
- Prenatal vitamins
- Fees for identification needed for SNAP application
- Grocery card (identification required for use)

INTERPERSONAL SAFETY:

- Train, bus fare for safe destination
- Court fees such as filing fees for new birth certificate, social security card, and ID/Driver's License
- Asylum application fee
- Fee for name change needed for safety

OTHER:

- Weather-appropriate clothing
- Expenses related to education and securing employment (e.g., registration fees, clothing for work, computer, cap and gown for graduation, certifications, education/vocational tuition (max \$1,000)
- Childcare assistance (up to 3 months)

FLEXIBLE FUNDS CANNOT BE USED FOR:

- Security deposit
- Tent
- Medical bills
- Prescriptions
- Durable medical equipment
- Vehicle loans
- Personal loans
- Credit card bills
- Property taxes