



CLARITY
HUMAN SERVICES

Santa Clara County New User Training Referrals/Community Queue Manual

Updated 22 December 2021



For Case Managers Making and Managing Community Queue Referrals

OVERVIEW OF REFERRAL PROCESS

All permanent supportive housing and rapid rehousing referrals will be facilitated by staff in the Office of Supportive Housing (OSH). In order to determine if there is a potential match for your clients, you should complete a VI-SPDAT assessment:

1. Access your client's profile:

Agency A

SEARCH FOR A CLIENT

Log into Clarity. From the "Search" screen, locate your client

SEARCH

Client Name	DOB	SSN
Community Queue 6	01/01/1980	0000
Community Queue Test-2	02/14/1980	1111
Community Queue Test-3	01/01/1980	0000
Community Queue Test-1	01/01/1983	1351
Jason Community-Queue4	06/13/1983	1212

Your recent client searches:

- Community-Queue Test-1
- Marjorie Simpson
- Marge Simpson
- Marlin Clownfish
- Patrick Starr

2. Enroll the client into the appropriate program at your agency:

Wonder Woman

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: [CE] THE SUNSHINE AGENCY

Enrollment History Provide Services Assessments Notes Files Forms

Enroll Program for client Wonder Woman

3. Next, complete a Current Living Situation (CLS) and VI-SPDAT assessment (these are accessed from the Assessments Tab).

PROGRAM: [CE] THE SUNSHINE AGENCY

Enrollment History Provide Services Assessments Notes Files Forms

Assessments

Current Living Situation

VI-F-SPDAT Prescreen for Families [V2] with SCC local questions

VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions

Select the appropriate assessment from the options available.

START

START

START

- Complete the CLS assessment and select SAVE and CLOSE when done. Proceed to complete the VI-SPDAT.

Add Current Living Situation for client Wonder Woman

Date of Contact

07/20/2020

Current Living Situation

Place not meant for habitation (e.g., a vehicle, an abandoned building, bu✓

Location Details

At the corner of 5th and Main, next to a Starbucks.

SAVE & CLOSE

CANCEL

- After completing the VI-SPDAT, refer any client with a score of 4 or higher to the community queue. Veterans should be referred, regardless of their score.

Note: Be sure and select the **Community Housing Queue** toggle to select the CQ where the referral should be sent. Then click **REFER DIRECTLY TO COMMUNITY QUEUE(S)**.

VI-SPDAT-V2 Score Summary

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	4	RISKS	0
SOCIALIZATION & DAILY FUNCTION	0	WELLNESS	0
VI-SPDAT-V2 PRE-SCREEN TOTAL 4			

☐ Community Housing Queue

REFER DIRECTLY TO COMMUNITY QUEUE(S)

RECEIVING REFERRALS

- Access the referral tab

Agency A

Adam Siegenthaler, Agency A

SEARCH CASP REFERRALS

SEARCH FOR A CLIENT

Access the Referrals Tab

ADD CLIENT

SEARCH

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

IT'S A GREAT DAY FOR TRAINING!!! IMPORTANT: NEVER enter actual client information in this training environment. All data entered in this system MUST be fictitious for security purposes.

Your recent client searches:

Community-Queue Test-1

Marjorie Simpson

Marge Simpson

Marlin Clownfish

Patrick Starr

2. Navigate to the referral you want to manage.

REFERRALS

Dashboard **Pending** Community Queue Analysis Completed Denied Sent Availability Open Units

Pending Referrals

Search

Characteristic -- Select --

Eligible Clients Only ☐

Mode Standard

Sort By Default

SEARCH

Client	Referral Date	Qualified	Days Pending
Community-Queue Test-1 Program: Emergency Shelter Referred by: Agency A	09/19/2018	Reassigned	0 total 0 pending

3. To immediately accept the referral and enroll the client in your program, click the client's name...

REFERRALS

Dashboard **Pending** Community Queue Analysis Completed Denied Sent Availability Open Units

REFERRAL: EDIT

Client **Community-Queue Test-1**

Referred Program Emergency Shelter

Referred to Agency Agency A

Referring Agency Agency A

Referred Date 09/19/2018 2:00 PM

Days Pending 0 day(s)

In Process 0 day(s)

Qualified Reassigned

VI-SPDAT-V2 score 14

Referred by Staff Adam Siegenthaler

Case Manager Select

Last Activity 05/06/2016 **CHECK-IN**

Status Pending

Private ☐

SAVE CHANGES CANCEL

a. Next, enroll the client in the program

HOUSING AVAILABILITY:

Households with at least one adult and one child 30 Beds in 6 Units

Program Placement a result of Referral provided by Agency A ☒

Bruce Willis ☐

PRINT DIRECTIONS DOC REQUIREMENTS

ENROLL

1 pending referral(s). Oldest 0 days.

4. To deny a referral, choose “Denied” in the status field and refer the denial back to the Community Queue (Note: Do not deny a referral without first checking with the OSH MatchMaker.)

The screenshot shows the 'REFERRALS: EDIT' form. The 'Status' field is circled in red, and a dropdown menu is open, showing options: Pending, Pending - In Process, Denied, and Expired. A red arrow points from a box labeled 'Select "Denied"' to the 'Denied' option in the dropdown. Other fields include Client (Community-Queue Test-1), Referred Program (Emergency Shelter), Referred to Agency (Agency A), Referring Agency (Agency A), Referred Date (09/19/2018 2:00 PM), Days Pending (0 day(s)), In Process (0 day(s)), Qualified (Reassigned), VI-SPDAT-V2 score (14), Referred by Staff (Adam Siegenthaler), Case Manager (Select), Last Activity (05/06/2016), and Private (checkbox). Buttons for CHECK-IN, SAVE CHANGES, and CANCEL are visible.





The screenshot shows the 'REFERRALS: EDIT' form with the 'Status' field set to 'Denied'. A red box highlights the 'Status' field and the 'Send to Community Queue' dropdown, which is set to '- Select --'. Other fields include Last Activity (12/22/2021), Denied By Type (- Select --), Denied Reason (Select), Denial Information (text area), and Private (checkbox). Buttons for CHECK-IN, SAVE CHANGES, and CANCEL are visible.

5. To indicate that you're working on the referral, such as by gathering additional information to determine final eligibility, indicate that the referral is “Pending – In Process”

The screenshot shows the 'REFERRALS: EDIT' form with the 'Status' field set to 'Pending - In Process'. A red box highlights the 'Status' field and the dropdown menu, which shows options: Pending, Pending - In Process, Denied, and Expired. Other fields include Case Manager (Select), Last Activity (12/22/2021), and Private (checkbox). Buttons for CHECK-IN, SAVE CHANGES, and CANCEL are visible.

6. Referrals that are inactive for more than 390 days will expire. Use the "Check-In" button if you need more time.

REFERRAL: EDIT

Client	Community-Queue Test-1
Referred Program	Emergency Shelter
Referred to Agency	Agency A
Referring Agency	Agency A
Referred Date	09/19/2018 2:00 PM
Days Pending	0 day(s)
In Process	0 day(s)
Qualified	Reassigned
VI-SPDAT-V2 score	14
Referred by Staff	Adam Siegenthaler
Case Manager	Select 
Last Activity	05/06/2016 
Status	Pending - In Process 
Private	

SAVE CHANGES

CANCEL