

# Santa Clara County New User Training Referrals/Community Queue Manual

Updated 19 Aug 2022





## 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 ≡ CASELOAD
SEARCH FOR A CLIENT	"Search" screen,	Your recent client searches:
	locate your client	Community-Queue Test-1
commun	SEA	RCH
Community Quoue 6	01/01/1980 0000	Marjorie Simpson
Community Queue Test-2	02/14/1980 1111	Marge Simpson
Community Queue Test-3	01/01/1980 0000	
Community-Queue Test-1	01/01/1983 1351	Marlin Clownfish
Jason Community-Queue4	06/13/1983 1212	Patrick Starr
naned with Clarity Human Services	a :	Recover deleted data

- 2. Ensure that the client has an active and valid Release of Information (ROI)
- 3. Enroll the client into the appropriate program at your agency:

Won	der Wor	nan							
PROFIL	E HISTORY	PROGRAMS	SERVICES	ASSESSMENTS	NOTES	FILES	CONTACT	LOCATION	REFERRALS
PRO	GRAM: [CE] T	HE SUNSHIN	E AGENCY						
	Enrollment	listory	Provide Servic	es Assessmen	ts Note	es Fil	es Forms		
	Enroll Pr	ogram for d	client Won	der Woman					

4. 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	imes Exit
Assessments Current Living Situation	LINK FROM ASSESSMENTS
VI-F-SPDAT Prescreen for Families [V2] with SCC local questions   Select the appropriate assessment from the options available.     VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions   From the options available.	START

5. Complete the CLS assessment and select SAVE and CLOSE when done. Proceed to complete the VI-SPDAT, *only* if it has been more than one year since the last VI-SPDAT was completed, *or* if the client has experienced a significant change/life event since the last VI-SPDAT (e.g. change in health, income, and/or family structure).

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, buv				
Location Details	At the corner of 5th and Main, next to a Starbucks.				
	SAVE & CLOSE CANCEL				

6. After completing the VI-SPDAT, review the client's score. If the client is a veteran (regardless of score), or if the client is not a veteran but scores 4 or higher on the VI-SPDAT, toggle on the Community Housing Queue ONLY to refer them to the correct queue. Assessors should NEVER refer clients to the queue called Administration Only/CET.

HISTORY OF HOUSING & H	IOMELESSNESS	0	RISKS	3
SOCIALIZATION & DAILY F	UNCTION	3	WELLNESS	6
	VI-SPDAT-V2 PRE-SCR	EEN TOTAL 12		
Community Hou	Ising Queue			

### **RECEIVING REFERRALS**

1. Access the referral tab

Agency A			HII P Adam Siegenthaler, Agararyk a <b>D SEARCH ≣ CASER (∳</b> & REFERRALS
SEARCH FOR A CLIENT	Access the Referrals Tab	ADD CLIENT +	Your recent client searches:
			Community-Queue Test-1
1		SEARCH	Marjorie Simpson
Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.		Marge Simpson	
IT'S A GREAT DAY FOR TRAINING!!! IMPORTANT: NEVER enter actual client information in this training environment. All data entered in this sy	stem MUST be fictitious for security purposes.		Marlin Clownfish
			Patrick Starr

2. Navigate to the referral you want to manage.

ERRALS			
Dashboard Pending Community Queue	Analysis Completed Denied Sent Availability	Open Units	
Pending Referrals			
Search	Be sure you're in the "Pending" Tab. Click edit next to the referral you ode want to manage.	Standard	~
Characteristic Select	Sort By	Default	~
Eligible Clients Only			SEARCH
Client	Referral Date	Qualified	Days Pending
Community-Queue Test-1 Program: Emergency Shelter Referred by: Agency A	<b>送</b> 圖 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 Pendir	ng Community Queue Analysis Completed Denied Sent Availability Open Units
Dashboard	g community queue Analysis completed benied Sent Avanability Open Onits
REFERRAL: EDIT	
Client	Community-Queue Test-1
Referred Program	Emergency Shelter
Referred to Agency	Agency A
Referring Agency	Agency A Click on the client's name to be taken to their profile
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:		
	When enrolling the client in the program,	30 Beds in 6 Units
	be sure to indicate that the enrollment is related to a referral	1 pending referral(s), Oldest 0 days.
Program Placement a result of Referral provided by Agency A	Bruce Willis	
PRINT DIRECTIONS DOC REQUIREMENTS		ENROLL

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.)

REFERRALS								
Dashboard Pe	ending Com	munity Queue	Analysis	Completed	Denied	Sent	Availability	Open Units
REFERRAL: EDIT								
Client	с	community-Queu	ie Test-1					
Referred Program	E	mergency Shelt	er					
Referred to Agency	A	gency A						
Referring Agency	A	gency A						
Referred Date	0	9/19/2018 2:00	РМ					
Days Pending	0	day(s)						
In Process	0	day(s)						
Qualified	R	eassigned						
VI-SPDAT-V2 score	1	4						
Referred by Staff Case Manager		Adam Siegenthaler						
		Select	~		0.1	-+ #D -		
Last Activity	0	5/06/2016	CHECK-IN		Sele	ct "De	nied	
Status Private		Pending Pending - Pending Denied Expired	ocess					
						SAVE CHA	NGES	CANCEL
			_					
ast Activity		12/22/		CHECK-IN				
tatus		Denied						~
end to Community Queue		Sele						~
enied By Type		Sele	ct					~
Denied Reason		Select						~
enial Information								
rivate								
			SAVE C	HANGES	CANC	EL		

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"

Case Manager	Select	~
Last Activity	12/22/2021 CHECK-IN	
Status	✓ Pending - In Process Denied	<u>'</u>
Private	Expired	
	SAVE CHANGES CANCEL	

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 V					
Last Activity	05/06/2016 CHECK-IN					
Status	Pending - In Process ~					
Private						
	SAVE CHANGES CANCEL					