

Coordinated Entry: Matchmaker Training

Marin County



Agenda

- ▶ What happened before?
- ▶ Referral to the CQ
- ▶ Orientation to the queue
 - ▶ Agency
 - ▶ Mode
 - ▶ Prioritization of queue/
Display scores
- ▶ Referrals to shelter or housing
- ▶ Removal from CQ
- ▶ Referral Notifications
- ▶ Reports
- ▶ Resources

What Happens Before...



Definitions

Community Queue (CQ): a list of clients who have been prioritized for shelter or housing.

- ▶ “Active List”
- ▶ Family Housing Queue

Matchmaking: the process of determining what resources clients are eligible for and making a referral to the resource

Matchmaker: the staff responsible for making the referral

Referral to the Community Queue



Referring to the CQ

- Marin has two community queues
Active List
Family Shelter

From the Family Assessment
From the Adult or TAY Assessment

Assessment

Enrollment History Provide Services **Assessments** Goals Notes Files Chart Forms X Exit

PROGRAM ELIGIBILITY DETERMINATION

Marin Score Summary

HISTORY OF HOUSING & HOMELESSNESS	0
RISKS	0

Marin PRE-SCREEN TOTAL 0

Active Queue **Toggle on the one or both queues based on the what the clients needs or is eligible for**

Family Shelter Queue

REFER DIRECTLY TO COMMUNITY QUEUES

PROGRAM ELIGIBILITY DETERMINATION

Marin Score Summary

HISTORY OF HOUSING & HOMELESSNESS	0
RISKS	0

Marin PRE-SCREEN TOTAL 0

Active Queue

REFER DIRECTLY TO COMMUNITY QUEUES

Referrals to the CQ

- If the client gets a VI-SPDAT Revision, the original assessment needs to be removed from the CQ and the new assessment will need to be referred

The screenshot displays a web application interface with a navigation bar at the top containing tabs: PROFILE, HISTORY (highlighted with a red box), SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below the navigation bar is a 'HISTORY' section with 'Advanced Search Options' and a 'View' dropdown. A table lists service records:

Service Name	Start Date	End Date
Referral: Community Queue Sara H. Agency 2 referral to Community Queue	08/07/2019	09/04
Adult Primary CE Assessment [TRAINING] San Francisco Adult Coordinated Entry Agency		07/23
LYRIC Access Point	04/01/2019	04/01

A modal window titled 'REMOVE FROM QUEUE' is open over the first row. It contains a 'Reason for Removal' dropdown menu (highlighted with a red box) with the following options: -- Select Reason --, Self Resolved, Refused All Housing, Whereabouts Unknown, Deceased, Reassessed, Automated Removal, and Other (selected with a blue checkmark and highlighted by a red arrow). Below the dropdown is a 'Queue Removal Date' field with the value '09/04/2019'. At the bottom of the modal are 'SAVE CHANGES' and 'CANCEL' buttons (both highlighted with red boxes). The modal also includes 'SAVE CHANGES' and 'CANCEL' buttons at the top right.

Matchmaking



Matchmaking

- Two Community Queues
Active List
Family Shelter
- Click on the CQ (blue indicates the CQ you are on)
- Queues are independent of each other

If a client is on both queues and referred from one, they still remain on the other queue.

REFERRALS

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

Community Queue

Active Queue Family Shelter Queue

Search Mode Standard

Active Agency Marin County Training Agency Characteristic -- Select --

Eligible Clients Only Sort By Default

SEARCH

Client	Referral Date	Days Pending
Steve Zissou Referred by: Marin County Training Agency	06/08/2020	17
5334 Test Referred by: Marin County Training Agency	06/08/2020	17

Managed with Clarity Human Services Recover deleted data

Matchmaking

The Community Queue is equipped with multiple filters. The unified search box allows for different types of criteria to be entered, either on its own, or in a combination with other terms.

Select search parameters and click *Search*:

- Search - Client Name, UI, SSN
- Mode - Assessment Type (e.g. VI-SPDAT Prescreen for Families [V1])
- Active Agency - the agency you want to send a referral to

The screenshot displays a search interface with the following elements:

- Search:** A text input field.
- Active Agency:** A dropdown menu with "Gartner Agency" selected.
- Eligible Clients Only:** A toggle switch that is currently turned off.
- Mode:** A dropdown menu with "Standard" selected.
- Characteristic:** A dropdown menu with "-- Select --" selected.
- Sort By:** A dropdown menu with "Default" selected.
- SEARCH:** A dark blue button with white text.









Below the search filters, the top of a table is visible with the following column headers: Client, Referral Date, and Days Pending.

Searching by Mode

Searching by Mode will show client score and prioritize clients on the CQ with the highest score

Sort By Default

SEARCH

Client	Referral Date	Days Pending	Score	
Sparkle Jonez Referred by: [TRAINING] San Francisco Youth Coordinated Entry Agency ⓘ	 05/26/2020	30	153	
Snarf Thundercat Referred by: [TRAINING] San Francisco Youth Coordinated Entry Agency ⓘ	 08/07/2019	323	72	
Jenny Wallis Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ	 05/20/2020	35	72	
Juliet Mendoza Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ	 12/13/2018	559	21	

Making a Referral

Select the correct program and click Save

Scroll down to the notes, section to enter a note if needed

The image shows a screenshot of a web application interface. At the top, there is a dark blue header with the text 'RE-ASSIGN' in white. Below this, there is a white form area. On the left side of the form, the word 'Program' is displayed. To its right is a dropdown menu with the text '-- Select Program --' and a small downward-pointing arrow. Below the dropdown menu, there are two buttons: 'SAVE CHANGES' and 'CANCEL'. Below the 'RE-ASSIGN' form, there is a dark blue header with the text 'REMOVE FROM QUEUE' in white. To the right of this header, there is a white form area with a dark blue header that says 'NOTES'. Below the 'NOTES' header, there is a large white text area with a thin border. At the top left of this text area, there are four small icons: a bold 'B', an italic 'I', a list icon, and a table icon. At the bottom right of the text area, there is a small cursor icon. Below the 'NOTES' form, there is a dark blue button with the text 'SEND NOTE' in white.



Referral Notifications

- The provider will receive a notification once the referral is sent
- The person who sends the referral will receive a notification once the provider changes the status of the referral

Referral Notifications

Notification	Time	Action
Pending Notification	7 days	If the status of the referral stays in pending status for 7 days or more, the provider will receive weekly notifications until the status is changed
Pending-in Process Notification	14 days	If the status of the referral stays in pending-in process status for 14 days or more, the provider will receive weekly notifications until the status is changed




History of the Referral

You can see the activity for a particular referral in the history of that referral

HISTORY

Advanced Search Options [View](#) ▼

Service Name	Start Date	End Date
Referral: Shelter Queue Cuyahoga Test Agency referral to Community Queue ⓘ	07/02/2020	Pending
 Referral: Sara's GPD Program Cuyahoga Test Agency referral to Cuyahoga Test Agency ⓘ	07/02/2020	Pending

HISTORY

Activity	Date	Days Pending	Staff
Program Referral: Sara's GPD Program, Cuyahoga Test Agency	07/10/2020 2020-07-10 07:28:45	8	Sara Hoffman Cuyahoga Test Agency ⓘ
Added to Community Queue: GPD Programs	07/02/2020 2020-07-02 01:12:17	0	Sara Hoffman Cuyahoga Test Agency ⓘ



Exits



Exits

- ▶ Assessor and Matchmaker staff are responsible for existing clients from the CE program
- ▶ Client should be exited from CE for the following reason:
 - ▶ The client has entered a permanent residential project type or is otherwise known to have found permanent housing
 - ▶ The client is known to have left the CoC to pursue other assistance
 - ▶ The client is deceased
 - ▶ Client has declined all services

Auto-Exits from CE

Auto-exits from CE happen when a client has a move-in date recorded or destination for a permanent housing destination

Example 1:

The client is referred to Fireside. The client is enrolled in the program with a move-in date of 7/30/20.

Auto-Exit from CE= YES

Example 2:

The client informs their CE staff they are going to live with their aunt in Oregon.

The client needs to be manualled exited from CE.


Auto-Exit=NO



Exits

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
 Coordinated Entry Program (Marin) Coordinated Entry Marin County Training Agency ⓘ	07/06/2020	Active	Individual
Emergency Shelter w/ Reservations			

Enrollment **History** Provide Services Assessments Notes Files Forms

✕ Exit

Program Service History

[LINK FROM HISTORY](#)

Service Name	Start Date	End Date
Problem Solving :Initiated Problem Solving Conversation [TRAINING] San Francisco Adult Coordinated Entry Agency	10/15/2019	10/15/2019

Reservation Service Referral



Let's Talk Reports



Referral Statistics Report

[RFRL-101] Referral Statistics (Community and Referral Reports)

- ▶ Who's been referred
- ▶ Inbound vs. outbound
- ▶ Number of referrals received by an agency
- ▶ Status of referrals

Referral Statistics Report

Referral Statistics		Sarah Smith Housing Services	
Dates Between:		05/01/2018 and 12/27/2018	
Referral Direction:		Outbound	
Number of Agency referrals received		3	
Pending Referrals			
Number of pending referrals		1	
Oldest pending referral in days		83	
Newest pending referral in days		83	
Average pending referral in days		83	
Pending - In Process Referrals			
Number of pending referrals		0	
Oldest pending referral in days		0	
Newest pending referral in days		0	
Average pending referral in days		0	
Completed Referrals			
Number of referrals resulting in Program enrollment		1	
Longest time to connect referral in days		53	
Shortest time to connect referral in days		53	
Average time to connect referral in days		53	
Denied Referrals			
Number of denied referrals		1	
Longest time to deny a referral in days		28	
Shortest time to deny a referral in days		28	
Average time to deny a referral in days		28	
Breakdown Of Most Common Denied Referral Reasons			
Client refused services		1	

Breakdown Of Referred Programs

NOTE: P - Pending; P / I - Pending - In process; A - Accepted; D - Denied.

PH - Permanent Supportive Housing (disability required)						
Agency Name	Program Name	P	P / I	A	D	
Sarah Smith Housing Services	Test PSH Program	1	0	0	0	
Sarah Smith Housing Services	Youth Hope Housing	0	0	0	1	
PH - Rapid Re-Housing						
Agency Name	Program Name	P	P / I	A	D	
Housing Test Agency	Rapid Rehousing	0	0	1	0	

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Community Queue Details Report

[RFRL-120] Community Queue Detail (Community and Referral Reports)

- ▶ Clients currently on the queue
- ▶ Specific demographic information about clients on the queue

Community Queue Details Report

Community Queue Age Breakdown

CA-501 - San Francisco CoC

Clients on the community queue who are between the ages of 18-25

Unique ID	Last Name	First Name	Gender	SSN	Age	VI-SPDAT
9FBA9D4A1	Jonez	Faith	Female	xxx-xx-2521	20	
31F51B319	Jonez	Sparkle	Female	xxx-xx-8456	21	
35266B209	Test	Onyx	Male	xxx-xx-8967	23	
B4E6B18E7	Test3	Advancedfrontlines taff	Female	xxx-xx-2543	19	
5866FCD21	Thundercat	Snarf	Male	xxx-xx-2345	18	

Total: 5

Clients on the community queue who are veterans

Unique ID	Last Name	First Name	Gender	SSN	Age	VI-SPDAT
0B7E83B1D	Flowers	Spring	Female	xxx-xx-9922	31	
0B7E83B1D	Flowers	Spring	Female	xxx-xx-9922	31	
35266B209	Test	Onyx	Male	xxx-xx-8967	23	

Total: 3

Clients in community queue with income

Unique ID	Last Name	First Name	Gender	SSN	Age	VI-SPDAT
No Data To Display...						

Total: 0

Clients on the community queue who have been in jail or prison

Unique ID	Last Name	First Name	Gender	SSN	Age	VI-SPDAT
No Data To Display...						

Total: 0

Clients on the community queue who reported having no insurance

Unique ID	Last Name	First Name	Gender	SSN	Age	VI-SPDAT
No Data To Display...						

Total: 0



Program Roster

- [GNRL-106] Program Roster (Program Based Report)
 - Who's stayed in the program
 - Lists program stay information for clients with the selected status in the selected program

Program Roster

Program Roster Report

Sarah Smith Housing Services
Active within [08/01/2018 - 12/27/2018]

Housing Move-in: Undefined = Unknown HoH or Move-in is Null, = Non PH Project

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	Assess-ments	Services	Assigned Staff
Program: Youth Hope Housing											
Test, Visibility	00948F75C	01/01/1998	20	20	12/18/2018	-	10	undefined	0	0	S. Dougherty

Total: 1

Program Name	Project Type	Project Applicability
Youth Hope Housing	PH - Permanent Supportive Housing (disability required)	Permanent Housing for Disabled Homeless Persons [SHP-PH]

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HUMAN SERVICES



Reports

**New and updated Coordinated
Entry report coming soon!!!!**



Resources

Bitfocus Help Desk

marin@bitfocus.com or (415) 429-4211

Marin Help Center Web Page

<https://marin.clarityhs.help/hc/en-us>

Coordinated Entry Training Materials

<https://marin.clarityhs.help/hc/en-us/articles/360052218714>

The Help Desk Widget

