Coordinated Entry: Matchmaker Training

Marin County



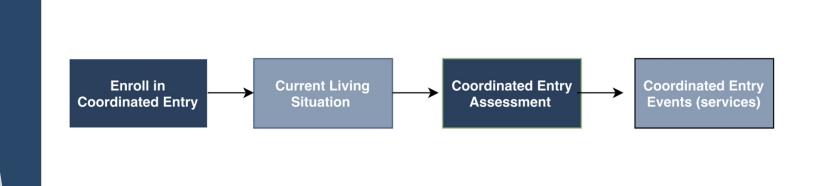
Agenda

- 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



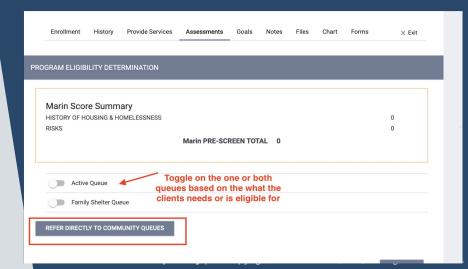
Referral to the Community Queue



Referring to the CQ

Marin has two community queues
 Active List
 Family Shelter

From the Family Assessment
From the Adult or TAY Assessment

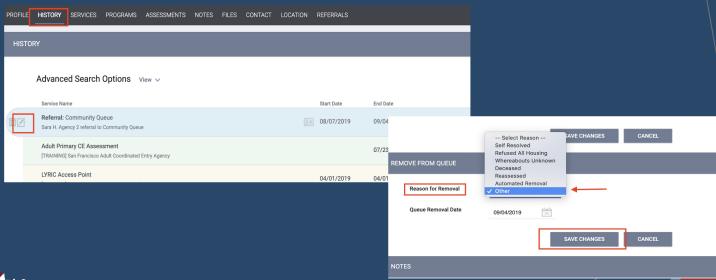


Assessment

Summary					
ING & HOMELESSINESS					
	Mar	in PRE-SCREE	N TOTAL 0		
eue —					
	ing & Homelessness	Mar	Marin PRE-SCREE	Marin PRE-SCREEN TOTAL 0	Marin PRE-SCREEN TOTAL 0

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





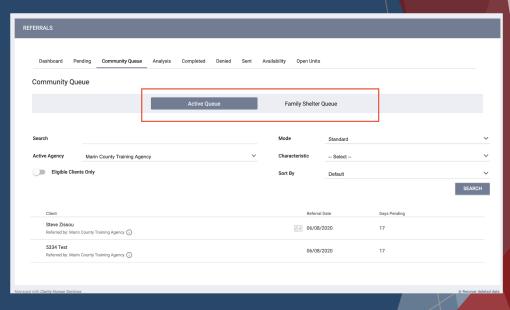
Matchmaking



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.







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







Searching by Mode

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

	Sort By	Default		
			ı	SEARCH
Client	Referral Date	Days Pending	Score	
Sparkle Jonez Referred by: [TRAINING] San Francisco Youth Coordinated Entry Agency ①	8 05/26/2020	30	153	ø
Snarf Thundercat Referred by: [TRAINING] San Francisco Youth Coordinated Entry Agency ①	8 08/07/2019	323	72	Ð
Jenny Wallis Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency ①	S 05/20/2020	35	72	Ð
Juliet Mendoza Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency (1)	8 12/13/2018	559	21	=

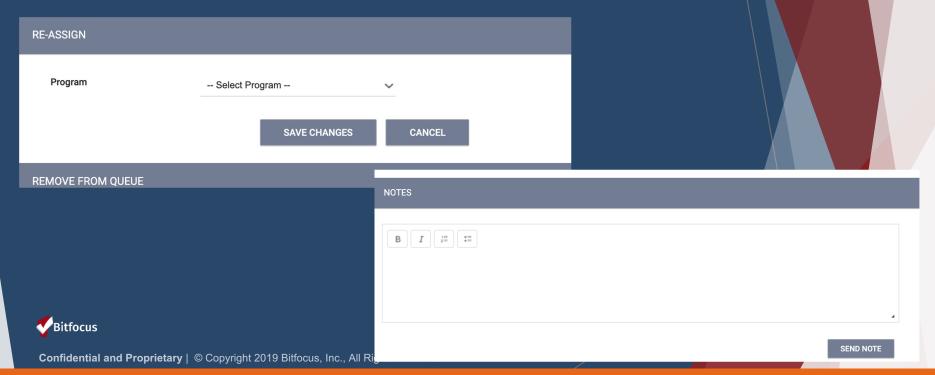




Making a Referral

Select the correct program and click Save

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



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

Н	HISTORY		
	Advanced Search Options View V	Start Date	End Date
	Referral: Shelter Queue Cuyahoga Test Agency referral to Community Queue (07/02/2020	Pending
	Referral: Sara's GPD Program Luyahoga Test Agency referral to Cuyahoga Test Agency ①	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 (i)





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:

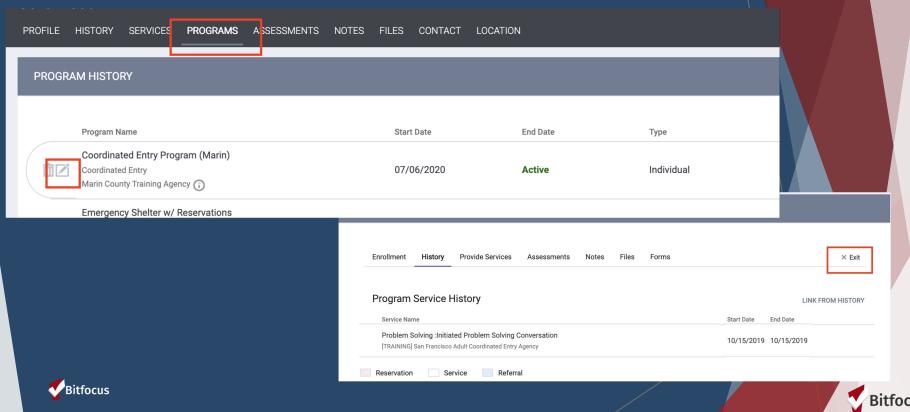
The client informs their CE staff they are going to live with their aunt in Oregon.

The client needs to be manualled exited from CE.

Auto-Exit=NO



Exits



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	Dates Between: Referral Direction:	Sarah Smith Housing Service 05/01/2018 and 12/27/20 Outbour
Number of Agency referrals rece	ived	3
Pending Referrals		·
Number of pending referrals	Number of pending referrals	
Oldest pending referral in day	/s	83
Newest pending referral in da	iys	83
Average pending referral in d	ays	83
Pending - In Process Referrals		
Number of pending referrals		0
Oldest pending referral in day	Oldest pending referral in days	
Newest pending referral in da	Newest pending referral in days	
Average pending referral in d	Average pending referral in days	
Completed Referrals		
Number of referrals resulting	in Program enrollment	1
Longest time to connect referral in days		53
Shortest time to connect refe	Shortest time to connect referral in days	
Average time to connect refe	rral in days	53
Denied Referrals		
Number of denied referrals		1
Longest time to deny a referr	al in days	28
Shortest time to deny a referr	al in days	28
Average time to deny a referr	al 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	Р	P/I	Α	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

The state are received to the state of the s					
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

	unity Queue Breakdown			CA-501 - San	Franc	isco CoC
nts on the c	ommunity queue who	are between the ages	of 18-25			
Unique ID	Last Name	First Name	Gender	SSN	Age	VI-SPDAT
FBA9D4A1	Jonez	Faith	Female	xxx-xx-2521	20	
1F51B319	Jonez	Sparkle	Female	xxx-xx-8456	21	
5266B209	Test	Onyx	Male	xxx-xx-8967	23	
4E6B18E7	Test3	Advancedfrontlines taff	Female	xxx-xx-2543	19	
866FCD21	Thundercat	Snarf	Male	xxx-xx-2345	18	
nts on the c Unique ID	Last Name	First Name	Gender	SSN	Age	VI-SPDAT
Jnique ID	Last Name	First Name	Gender	SSN	Age	VI-SPDAT
B7E83B1D	Flowers	Spring	Female	xxx-xx-9922	31	
B7E83B1D	Flowers	Spring	Female	xxx-xx-9922	31	
35266B209	Test	Onyx	Male	xxx-xx-8967	23	
nts in comm Unique ID	nunity queue with inc	ome First Name	Gender	SSN	Age	VI-SPDAT
		No Data 1	To Display			
						Total: 0
nts on the c	ommunity queue who	have been in jail or pr	rison			
nts on the c Unique ID	Last Name	have been in jail or pr	rison Gender	SSN	Age	VI-SPDAT
		First Name		SSN	Age	VI-SPDAT
Unique ID	Last Name	First Name	Gender To Display	SSN	Age	VI-SPDAT Total: 0
Unique ID	Last Name	First Name No Data	Gender To Display	SSN	Age	



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

Sarah Smith Housing Services Program Roster Report Active within [08/01/2018 - 12/27/2018] Housing Move-in: Undefined = Unknown HoH or Move-in is Null, = Non PH Project Unique Birth Current Enroll Exit Housing Assess-LOS Services Assigned Staff Client Identifier Date At Entry Date Date Move-in Age Program: Youth Hope Housing 00948F75C Test, Visibility 01/01/1998 20 20 12/18/2018 10 undefined 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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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/enus/articles/360052218714



