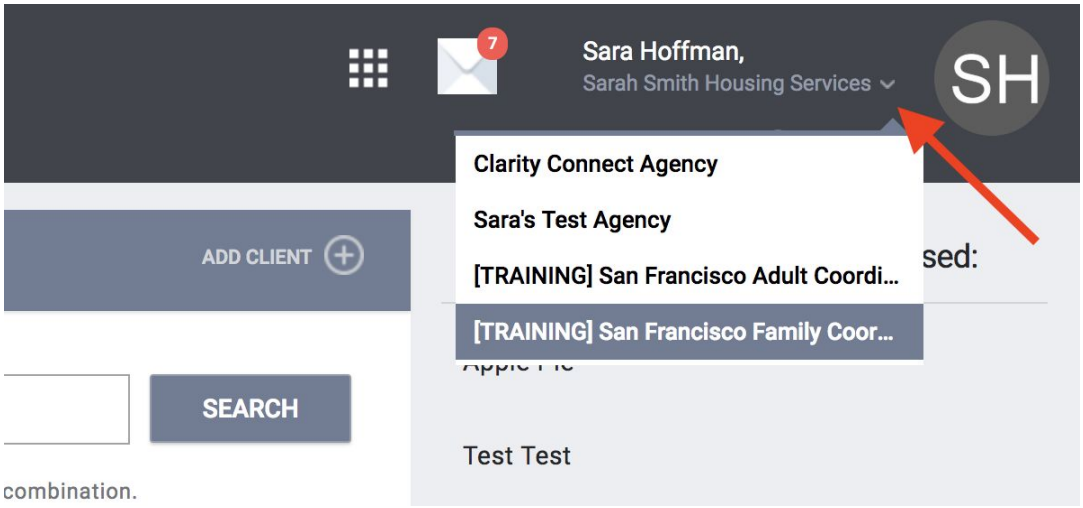
Matchmaking- Using the Community Queue and Eligibility Engine

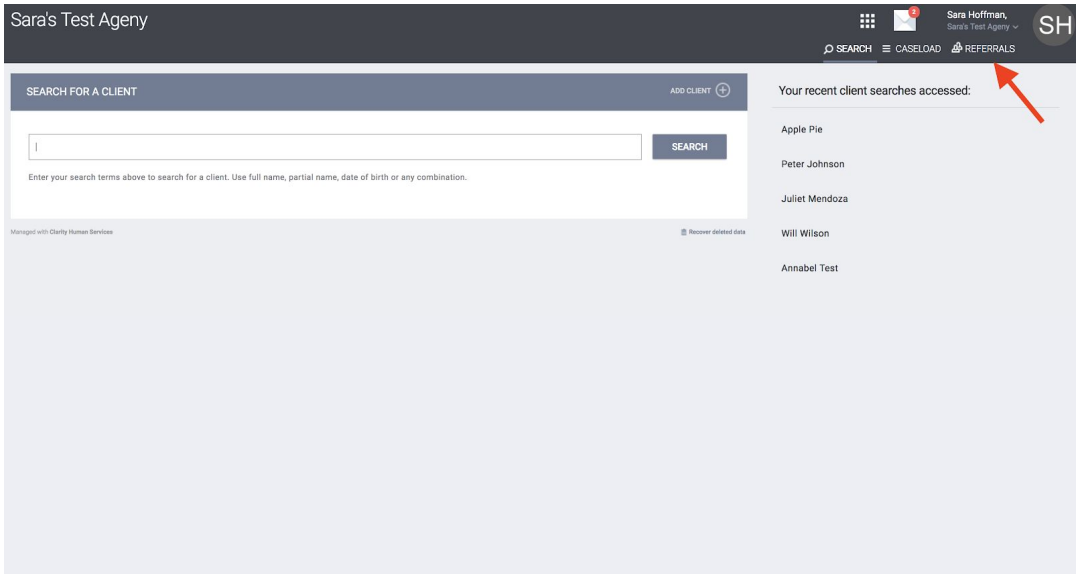
This document outlines the steps to match a client to an available housing resource using the Community Queue and the Eligibility Engine.

General Matchmaking

Step 1: Switch your agency to the Coordinated Entry Agency by clicking the drop down arrow under you name. Select the applicable Coordinated Entry agency.



Step 2: Click on “Referrals” at the top right side of the screen. *Note: If you do not see the Referrals Tab, click search to go back to the Home Screen. The Referrals Tab should appear.*



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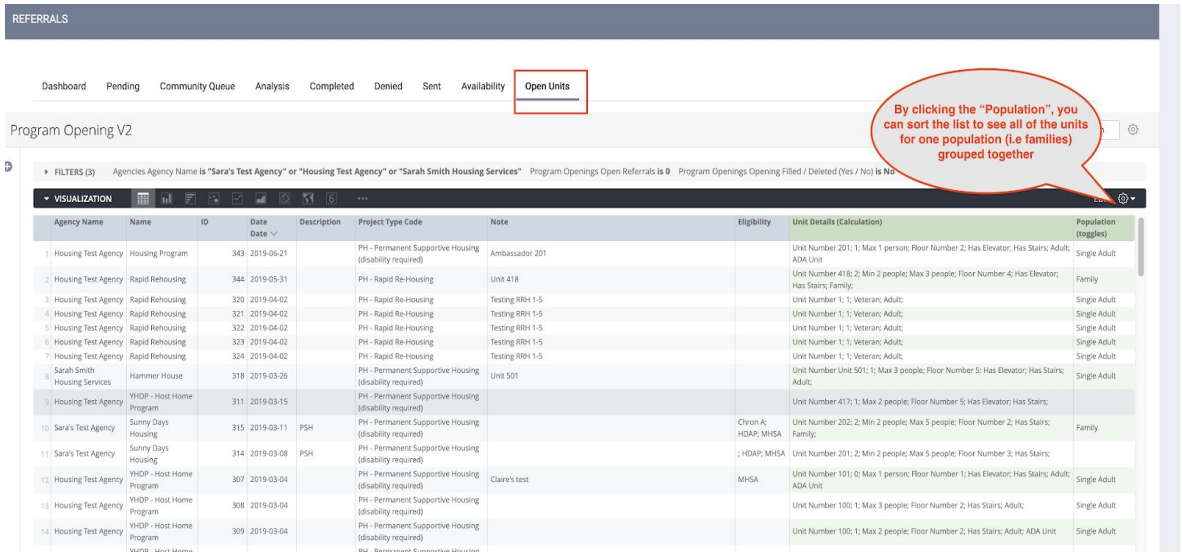
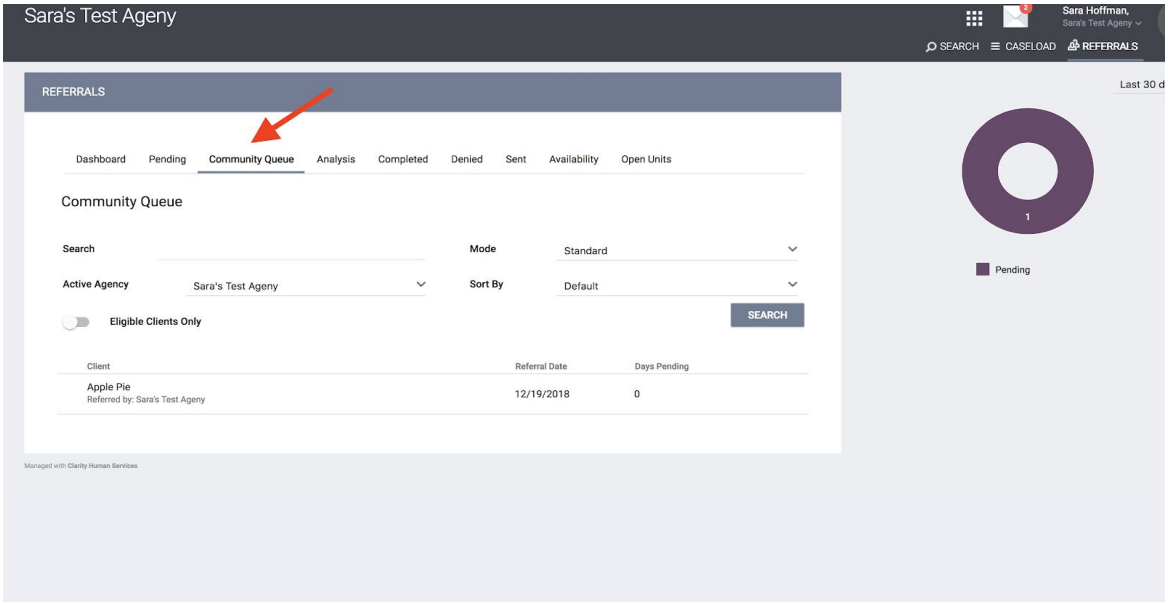
Step 3: Click the “Open Units” Tab. This dashboard provides a list of all housing resources that have been posted by providers and need to be filled.

Step 4: Review the list to see what unit has been available to longest and work to fill that unit.



Step 5: Click on the “Community Queue” tab.



Step 6: Set the filters following the following instructions:
“Active Agency”= the agency that has the open housing resource you will be referring to

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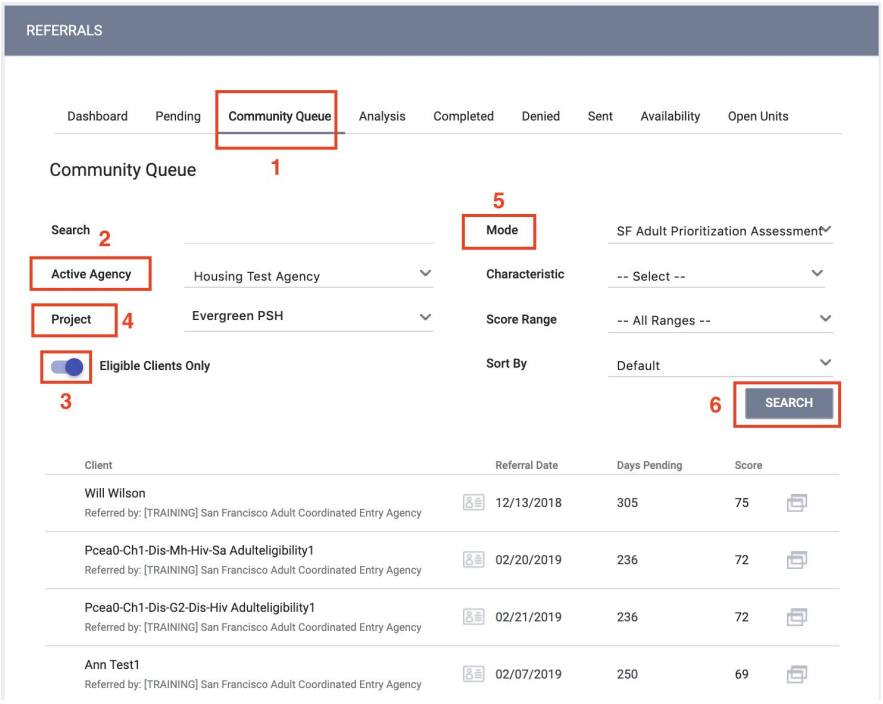
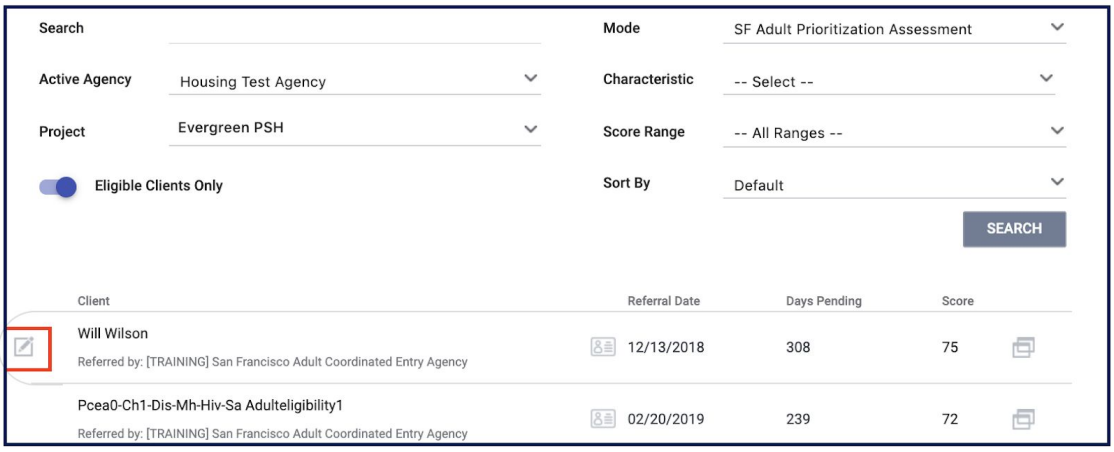
“Eligible Clients Only Toggle” = ON
“Project”= select the program that has the open housing resource you will be referring to
“Mode”= select the appropriate assessment type (SF Adult Prioritization for adult and youth referrals and SF Homeless Family Priority and Eligibility Assessment for family referrals).
Click “Search”.



Step 7: Clients are sorted by the highest vulnerability score and days pending on the community queue. The top client in the list should be referred first. Click edit to next to the name of the client who will be referred.



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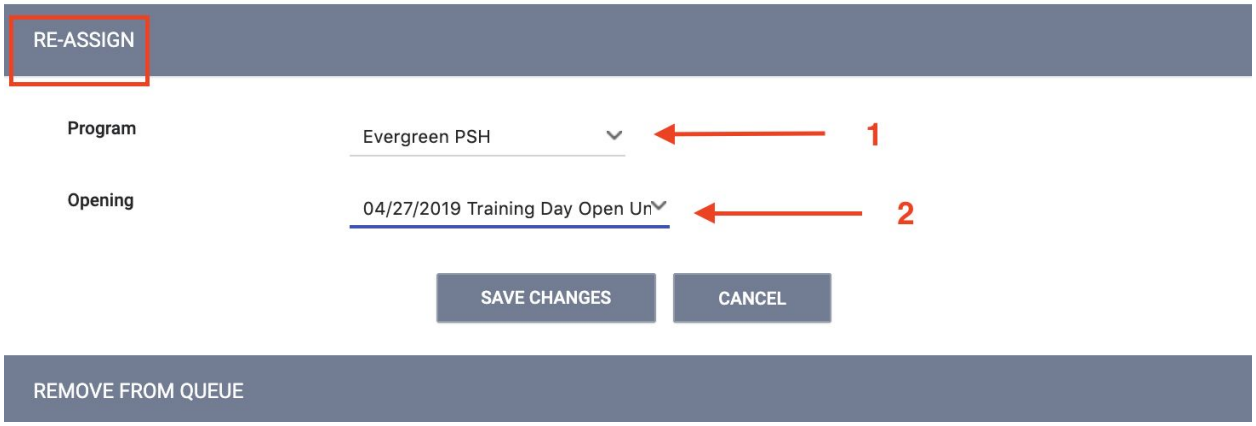
Step 8: Scroll down to the section titled “Re-Assign”. Select the program you are referring to and then the correct opening from the “Opening” drop down. Click “Save Changes”.

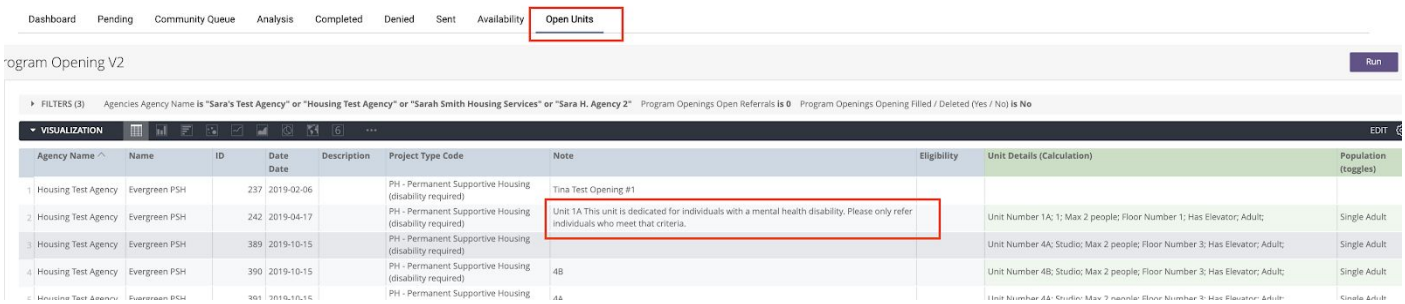


Tracked Characteristics

Tracked Characteristics are client level filters that can be used to add additional filters when searching for eligible clients for a unit. Tracked Characteristics are used when an individual unit has additional eligibility criteria that does not apply to an entire program.

Example: The Evergreen PSH Apartments has 24 units. 20 units require an adult who is experiencing homelessness and has an income less than 30% of the AMI. The remaining 4 units require the same eligible but are dedicated to individuals with a mental health disability. The program eligibility was configured in ONE including the homelessness and income requirements.

Providers will indicate in the unit posting when additional eligibility criteria is required for a unit.



Step 1: Follow the same steps listed above for general matchmaking and then add on the next step.

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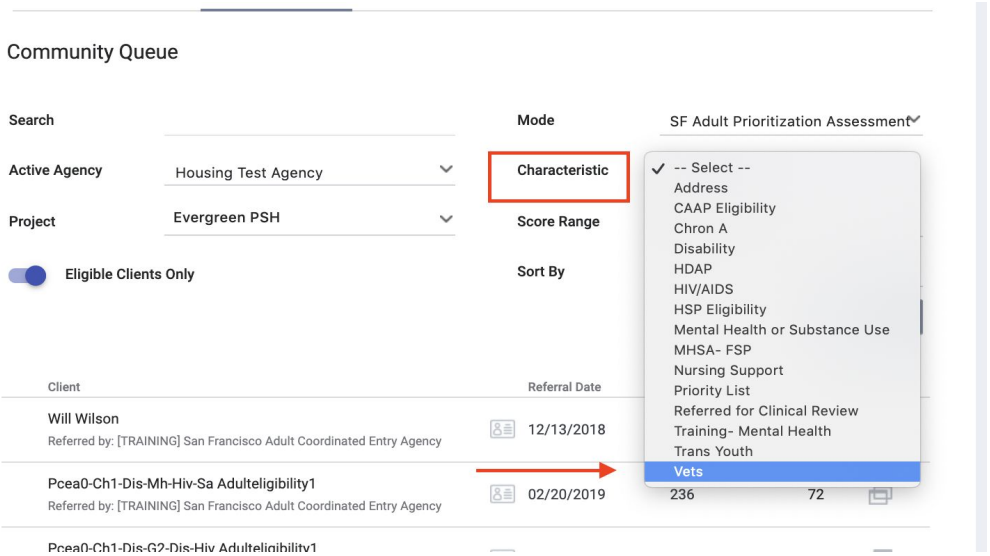
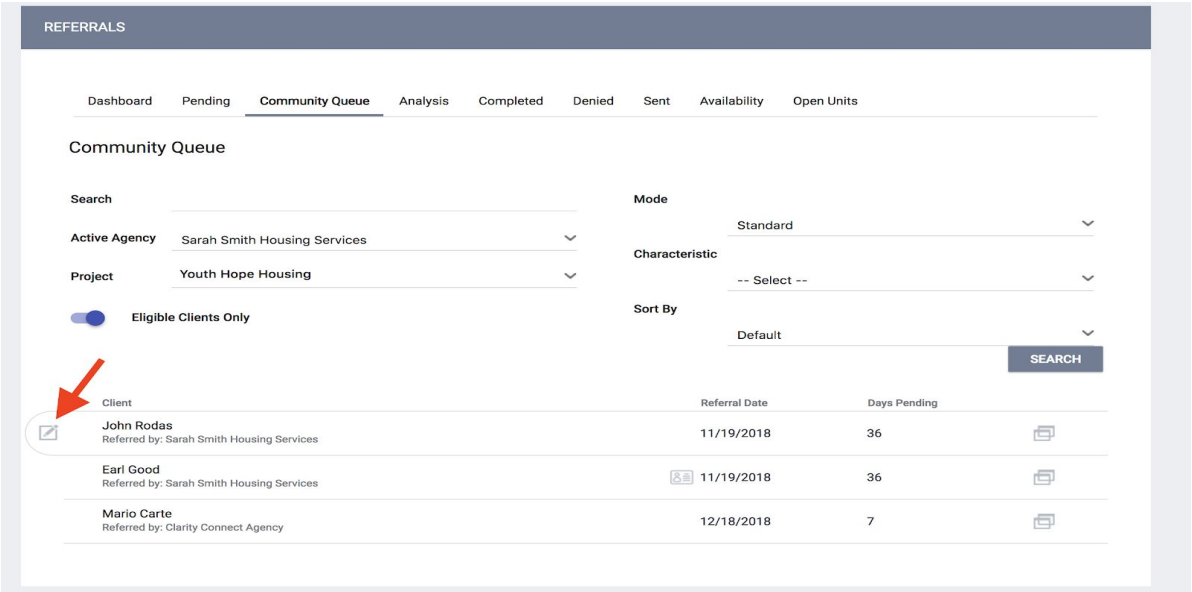
Step 2: Click the drop down for “Characteristic”. Select the applicable characteristic.



Step 3: Once the list of eligible clients populates, follow step 7 under general matchmaking above.



12) The agency and opening the client was referred to will know show in the client’s record.

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