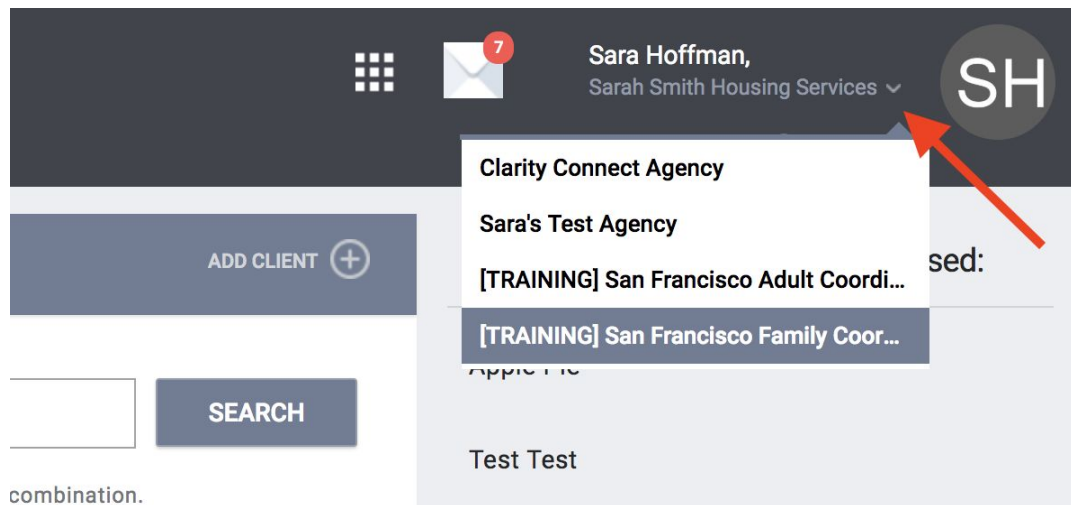


## Matchmaking- Using the Community Queue and Eligibility Engine

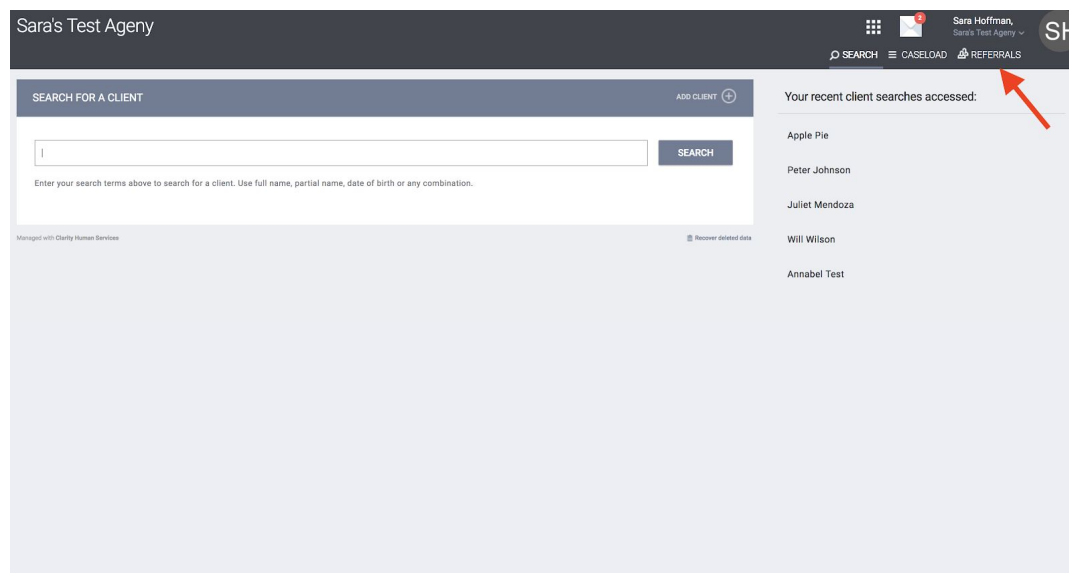
This document outlines the steps to match a client to an available housing resource using the Community Queue and the Eligibility Engine.

### General Matchmaking

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



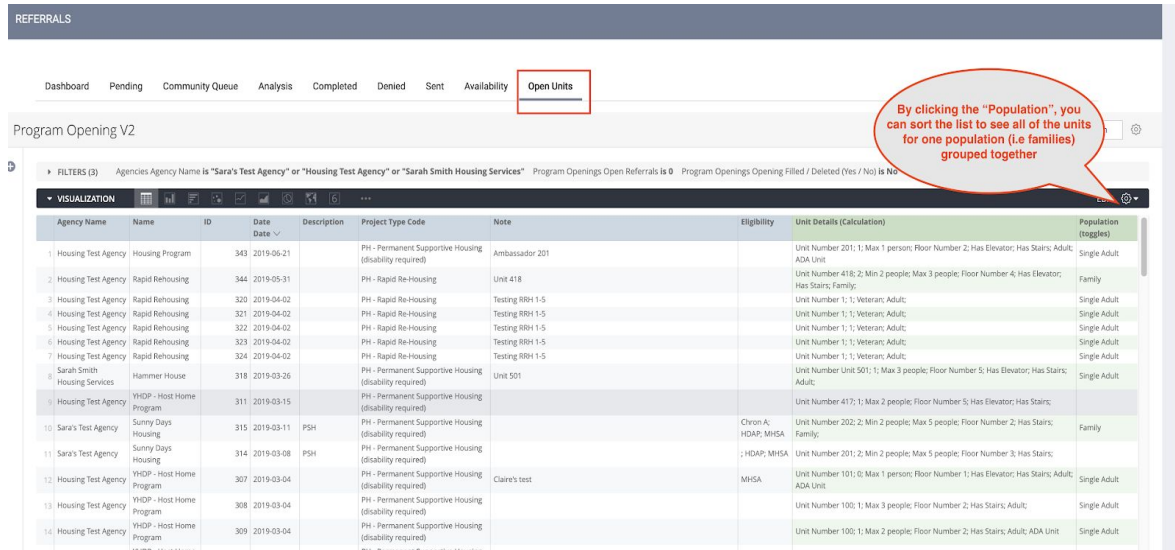
**Step 2:** Click on "Referrals" at the top right side of the screen. *Note: If you do not see the Referrals Tab, click search to go back to the Home Screen. The Referrals Tab should appear.*



# Matchmaking- Using the Community Queue and Eligibility Engine

**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.



REFERRALS

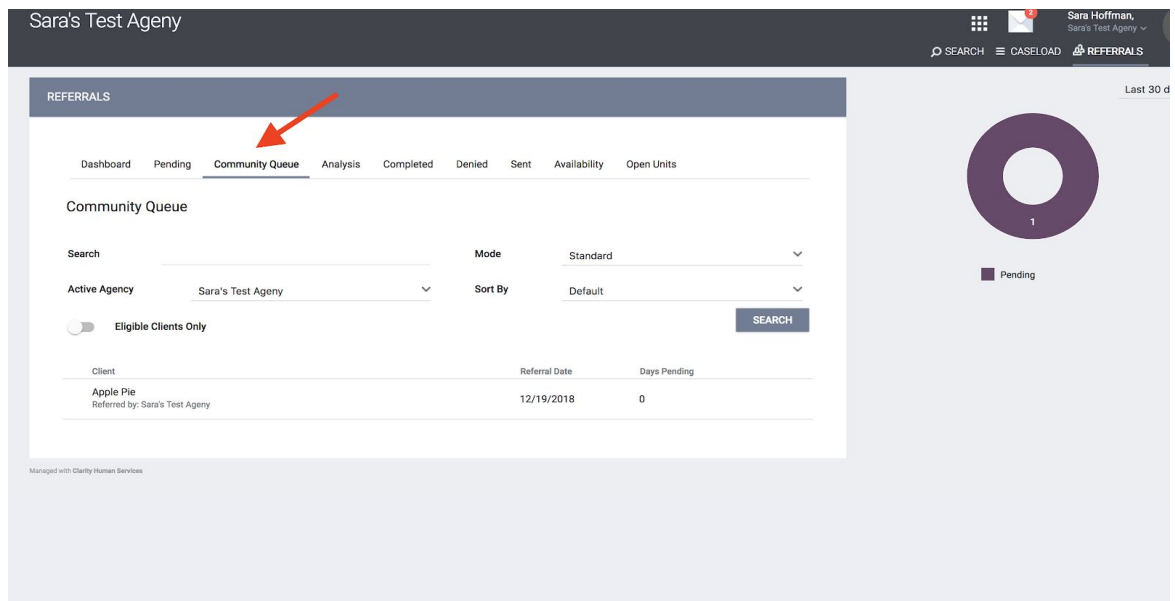
Dashboard Pending Community Queue Analysis Completed Denied Sent Availability **Open Units**

Program Opening V2

By clicking the "Population", you can sort the list to see all of the units for one population (i.e families) grouped together

Agency Name	Name	ID	Date Date	Description	Project Type Code	Note	Eligibility	Unit Details (Calculation)	Population (toggle)
1 Housing Test Agency	Housing Program	343	2019-06-21		PH - Permanent Supportive Housing (disability required)	Ambassador 201		Unit Number 201; 1; Max 1 person; Floor Number 2; Has Elevator; Has Stairs; Adult; ADA Unit	Single Adult
2 Housing Test Agency	Rapid Rehousing	344	2019-05-31		PH - Rapid Re-Housing	Unit 418		Unit Number 418; 2; Min 2 people; Max 3 people; Floor Number 4; Has Elevator; Has Stairs; Family;	Family
3 Housing Test Agency	Rapid Rehousing	320	2019-04-02		PH - Rapid Re-Housing	Testing RRH 1-5		Unit Number 1; 1; Veterans; Adult;	Single Adult
4 Housing Test Agency	Rapid Rehousing	321	2019-04-02		PH - Rapid Re-Housing	Testing RRH 1-5		Unit Number 1; 1; Veterans; Adult;	Single Adult
5 Housing Test Agency	Rapid Rehousing	322	2019-04-02		PH - Rapid Re-Housing	Testing RRH 1-5		Unit Number 1; 1; Veterans; Adult;	Single Adult
6 Housing Test Agency	Rapid Rehousing	323	2019-04-02		PH - Rapid Re-Housing	Testing RRH 1-5		Unit Number 1; 1; Veterans; Adult;	Single Adult
7 Housing Test Agency	Rapid Rehousing	324	2019-04-02		PH - Rapid Re-Housing	Testing RRH 1-5		Unit Number 1; 1; Veterans; Adult;	Single Adult
8 Sarah Smith Housing Services	Hammer House	318	2019-03-26		PH - Permanent Supportive Housing (disability required)	Unit 501		Unit Number Unit 501; 1; Max 3 people; Floor Number 5; Has Elevator; Has Stairs; Adult;	Single Adult
9 Housing Test Agency	YHDP - Host Home Program	311	2019-03-15		PH - Permanent Supportive Housing (disability required)			Unit Number 417; 1; Max 2 people; Floor Number 5; Has Elevator; Has Stairs;	
10 Sara's Test Agency	Sunny Days Housing	315	2019-03-11	PSH	PH - Permanent Supportive Housing (disability required)		Chron A; HDAP; MHSA	Unit Number 202; 2; Min 2 people; Max 5 people; Floor Number 2; Has Stairs; Family;	Family
11 Sara's Test Agency	Sunny Days Housing	314	2019-03-08	PSH	PH - Permanent Supportive Housing (disability required)		; HDAP; MHSA	Unit Number 201; 2; Min 2 people; Max 5 people; Floor Number 3; Has Stairs;	
12 Housing Test Agency	YHDP - Host Home Program	307	2019-03-04		PH - Permanent Supportive Housing (disability required)	Claire's test	MHSA	Unit Number 101; 0; Max 1 person; Floor Number 1; Has Elevator; Has Stairs; Adult; ADA Unit	Single Adult
13 Housing Test Agency	YHDP - Host Home Program	308	2019-03-04		PH - Permanent Supportive Housing (disability required)			Unit Number 100; 1; Max 3 people; Floor Number 2; Has Stairs; Adult;	Single Adult
14 Housing Test Agency	YHDP - Host Home Program	309	2019-03-04		PH - Permanent Supportive Housing (disability required)			Unit Number 100; 1; Max 2 people; Floor Number 2; Has Stairs; Adult; ADA Unit	Single Adult

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



Sara's Test Agency

Sara Hoffman, Sara's Test Agency

SEARCH CASELOAD REFERRALS

REFERRALS

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

Community Queue

Search  Mode Standard

Active Agency Sara's Test Agency Sort By Default

Eligible Clients Only

Client	Referral Date	Days Pending
Apple Pie Referred by: Sara's Test Agency	12/19/2018	0

Managed with Clarity Human Services

Last 30 d

1 Pending

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

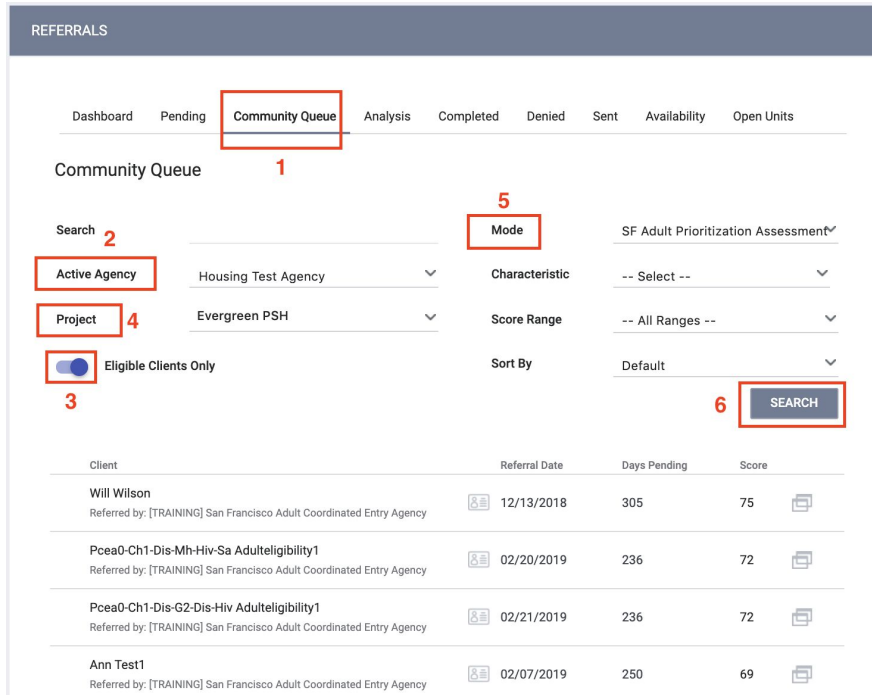
# Matchmaking- Using the Community Queue and Eligibility Engine

“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”.



REFERRALS

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

Community Queue **1**

Search **2** **5** Mode SF Adult Prioritization Assessment\*

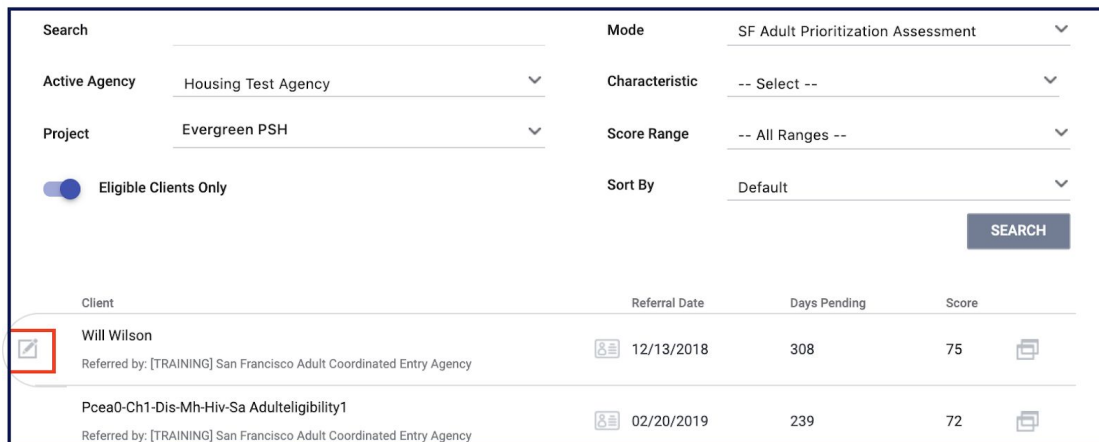
Active Agency **3** Housing Test Agency Characteristic -- Select --

Project **4** Evergreen PSH Score Range -- All Ranges --

Eligible Clients Only Sort By Default **6** **SEARCH**

Client	Referral Date	Days Pending	Score
Will Wilson Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	12/13/2018	305	75
Pcea0-Ch1-Dis-Mh-Hiv-Sa Adulteligibility1 Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	02/20/2019	236	72
Pcea0-Ch1-Dis-G2-Dis-Hiv Adulteligibility1 Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	02/21/2019	236	72
Ann Test1 Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	02/07/2019	250	69

**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.




Search Mode SF Adult Prioritization Assessment

Active Agency Housing Test Agency Characteristic -- Select --

Project Evergreen PSH Score Range -- All Ranges --

Eligible Clients Only Sort By Default **SEARCH**

Client	Referral Date	Days Pending	Score
 Will Wilson Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	12/13/2018	308	75
Pcea0-Ch1-Dis-Mh-Hiv-Sa Adulteligibility1 Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	02/20/2019	239	72

# Matchmaking- Using the Community Queue and Eligibility Engine

**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”.

RE-ASSIGN

Program ← 1

Evergreen PSH ▼

Opening ← 2

04/27/2019 Training Day Open Un ▼

SAVE CHANGES
CANCEL

REMOVE FROM QUEUE

### 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.

Dashboard Pending Community Queue Analysis Completed Denied Sent Availability Open Units

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Program Opening V2 Run

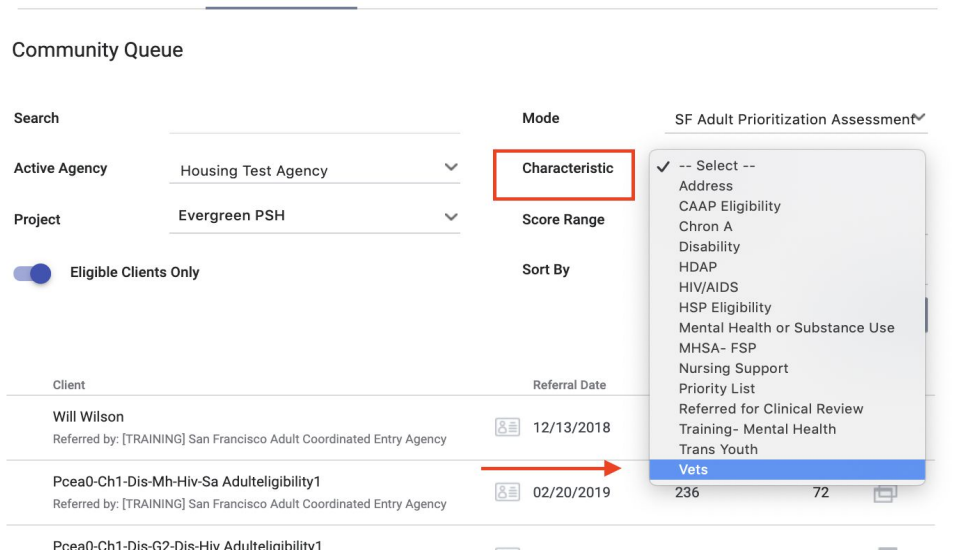
FILTERS (3) Agencies Agency Name is "Sara's Test Agency" or "Housing Test Agency" or "Sarah Smith Housing Services" or "Sara H. Agency 2" Program Openings Open Referrals is 0 Program Openings Opening Filled / Deleted (Yes / No) is No

VISUALIZATION							EDIT		
Agency Name	Name	ID	Date Date	Description	Project Type Code	Note	Eligibility	Unit Details (Calculation)	Population (toggles)
1 Housing Test Agency	Evergreen PSH	237	2019-02-06	PH - Permanent Supportive Housing (disability required)		Tina Test Opening #1			
2 Housing Test Agency	Evergreen PSH	242	2019-04-17	PH - Permanent Supportive Housing (disability required)		Unit 1A This unit is dedicated for individuals with a mental health disability. Please only refer individuals who meet that criteria.		Unit Number 1A; 1; Max 2 people; Floor Number 1; Has Elevator; Adult;	Single Adult
3 Housing Test Agency	Evergreen PSH	389	2019-10-15	PH - Permanent Supportive Housing (disability required)				Unit Number 4A; Studio; Max 2 people; Floor Number 3; Has Elevator; Adult;	Single Adult
4 Housing Test Agency	Evergreen PSH	390	2019-10-15	PH - Permanent Supportive Housing (disability required)		4B		Unit Number 4B; Studio; Max 2 people; Floor Number 3; Has Elevator; Adult;	Single Adult
5 Housing Test Agency	Evergreen PSH	391	2019-10-15	PH - Permanent Supportive Housing		4A		Unit Number 4A; Studio; Max 2 people; Floor Number 3; Has Elevator; Adult;	Single Adult

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

# Matchmaking- Using the Community Queue and Eligibility Engine

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



Community Queue

Search: \_\_\_\_\_ Mode: SF Adult Prioritization Assessment

Active Agency: Housing Test Agency **Characteristic**

Project: Evergreen PSH Score Range: \_\_\_\_\_

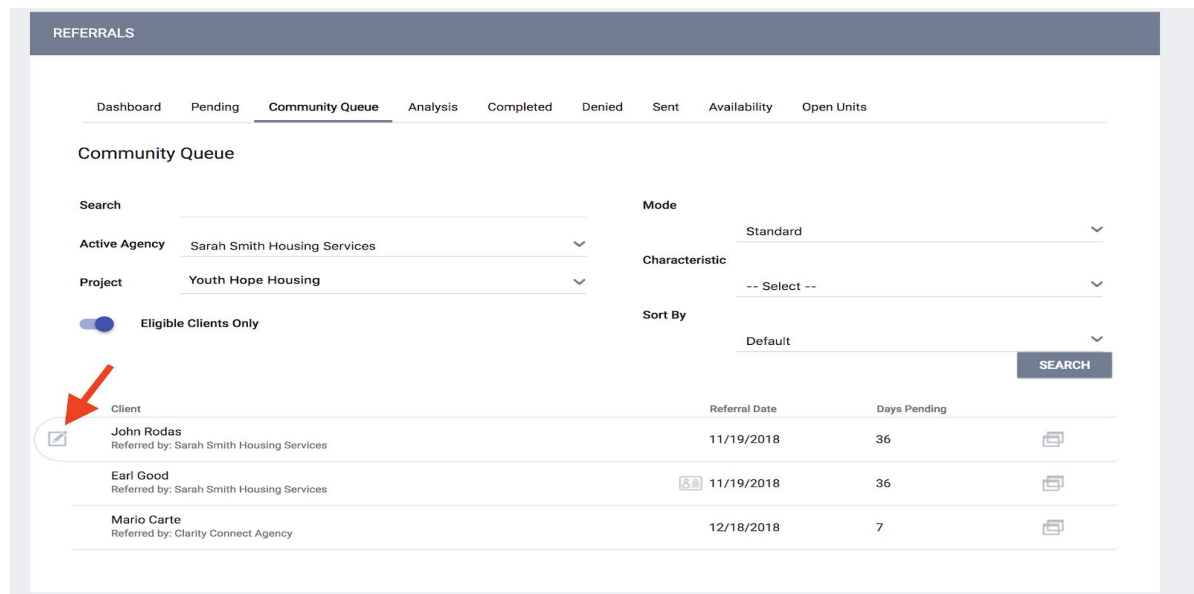
Eligible Clients Only

Sort By: \_\_\_\_\_

Client	Referral Date
Will Wilson Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	12/13/2018
Pcea0-Ch1-Dis-Mh-Hiv-Sa Adulteligibility1 Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	02/20/2019
Pcea0-Ch1-Dis-G2-Dis-Hiv Adulteligibility1	

Dropdown menu options: -- Select --, Address, CAAP Eligibility, Chron A, Disability, HDAP, HIV/AIDS, HSP Eligibility, Mental Health or Substance Use, MHSA- FSP, Nursing Support, Priority List, Referred for Clinical Review, Training- Mental Health, Trans Youth, **Vets** (236), 72

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



REFERRALS

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

Community Queue

Search: \_\_\_\_\_ Mode: Standard

Active Agency: Sarah Smith Housing Services Characteristic: -- Select --

Project: Youth Hope Housing Sort By: Default

Eligible Clients Only

SEARCH

Client	Referral Date	Days Pending
<input checked="" type="checkbox"/> John Rodas Referred by: Sarah Smith Housing Services	11/19/2018	36
Earl Good Referred by: Sarah Smith Housing Services	11/19/2018	36
Mario Carte Referred by: Clarity Connect Agency	12/18/2018	7

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