

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 | | | D SEARCH _ CASELOAD |
|------------------------|--|--------------------------|------------------------------|
| SEARCH FOR A CLIENT | Log into Clarity. From the "Search" screen. | | Your recent client searches: |
| | locate your client | | Community-Queue Test-1 |
| commun | | SEARCH | Mariania Simaaan |
| Community Quoue 6 | 01/01/1980 0030 | | warjone 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 | | Manin Clownish |
| Jason Community-Gueue4 | 06/13/1983 1212 | W. Document deleted date | Patrick Starr |

- 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 | | | | | | | |
|---------|--------------|------------|-----------------|--------------|---------|--------|----------|----------|-----------|
| PROFILE | HISTORY | PROGRAMS | SERVICES | ASSESSMENTS | NOTES | FILES | CONTACT | LOCATION | REFERRALS |
| PRO | GRAM: [CE] T | HE SUNSHIN | IE AGENCY | | | | | | |
| | Enrollment | History | Provide Service | es Assessmen | ts Note | es Fil | es Forms | | |
| | Enroll Pr | ogram for | 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 | × Exit |
| Assessments | LINK FROM ASSESSMENTS |
| VI-F-SPDAT Prescreen for Families [V2] with SCC local questions Select the appropriate assessment | START |
| VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions | 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 | | | | |

 After completing the VI-SPDAT, review the client's score. Only clients who score 4 or higher on the VI-SPDAT, regardless of veteran status, should be referred to the queue - toggle on the Community Housing Queue ONLY to refer them to the correct queue. <u>Assessors should NEVER</u> refer clients to the queue called Administration Only/CET.

| HISTORY OF HOUSING & | HOMELESSNESS | 0 | RISKS | 3 |
|-----------------------|---------------------|---------------|----------|---|
| SOCIALIZATION & DAILY | FUNCTION | 3 | WELLNESS | 6 |
| | VI-SPDAT-V2 PRE-SCF | REEN TOTAL 12 | | |
| Administration | | | | |

1. Access the referral tab

| Agency A | | | HII Parts A dam Siegenthaler, Agents A → O SFARCH = CASE! → & 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 |
| TTS 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.

| Dashboard Pending Community Que | eue 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 want to manage. | Standard | |
| Characteristic Select | Sort By | Default | ` |
| Eligible Clients Only | | | SEARCH |
| Client | Referral I | Date Qualified | Days Pending |
| Community-Queue Test-1 Program: Emergency Shelter Referred by: Agency A | <u>8</u> 09/19/2 | 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 Pending | Community Queue Analysis Completed Denied Sent Availability Open Units |
| | 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 V |
| | Private | |
| | | SAVE CHANGES CANCEL |
| a. Next, enrol | I the client | in the program |
| HOUSING AVAILABILITY: | | |
| ► Households with at least one adult and one ct | when e | nrolling the client in the program, |
| | be sure | to indicate that the enrollment is |
| Program Placement a result of Referral provided by Agency A | Bruce W | related to a reterral 1 pending referral(s). Oldest 0 days. |

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.)

PRINT DIRECTIONS

ENROLL

| REFERRALS | | | | | | | | | |
|-------------------------|---------------|---|----------|-----------|--------|----------|--------------|------------|--|
| Dashboard | Pending | Community Queue | Analysis | Completed | Denied | Sent | Availability | Open Units | |
| REFERRAL: EDIT | | | | | | | | | |
| Client | | Community-Queu | e Test-1 | | | | | | |
| Referred Program | | Emergency Shelter | | | | | | | |
| Referred to Agenc | у | 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 | е | 14 | | | | | | | |
| Referred by Staff | | Adam Siegenthal | er | | | | | | |
| Case Manager | | Select V | | | | | | | |
| Last Activity | | 05/06/2016 | CHECK-IN | | Sele | ct "De | nied | | |
| Status Private | | ✓ Pending Pending - Denied Expired | ocess | | | | | | |
| | | | | | | SAVE CHA | INGES | CANCEL | |
| ast Activity | | 12/22/ | 2021 | CHECK-IN | | | | | |
| Status | | Denied | 1 | | | | | ~ | |
| Send to Community Queue |] | Sele | ct | | | | | ~ | |
| Denied By Type | enied By Type | | ct | | | | | ~ | |
| Denied Reason | | Select | | | | | | ~ | |
| enial Information | | | | | | | | | |
| Private | - | | SAVE CH | 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 Pending | |
| 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 ~ | | | | | |
| Last Activity | 05/06/2016 CHECK-IN | | | | | |
| Status | Pending - In Process 🗸 | | | | | |
| Private | | | | | | |
| | SAVE CHANGES CANCEL | | | | | |