



COVID-19 ReHousing Wave

Referral Process for Matchmakers

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About the ReHousing Wave Initiative

The COVID-19 ReHousing Wave is a Santa Cruz County initiative to permanently house participants of the COVID-19 shelter programs prior to program closures. The county collaborated with Bitfocus to create a prioritization tool to triage services to the most vulnerable participants. To achieve this end, the custom tool created is used in conjunction with the matchmaking from Community Queue to ensure all eligible participants are outreached to.

In this documentation, we will cover the following:

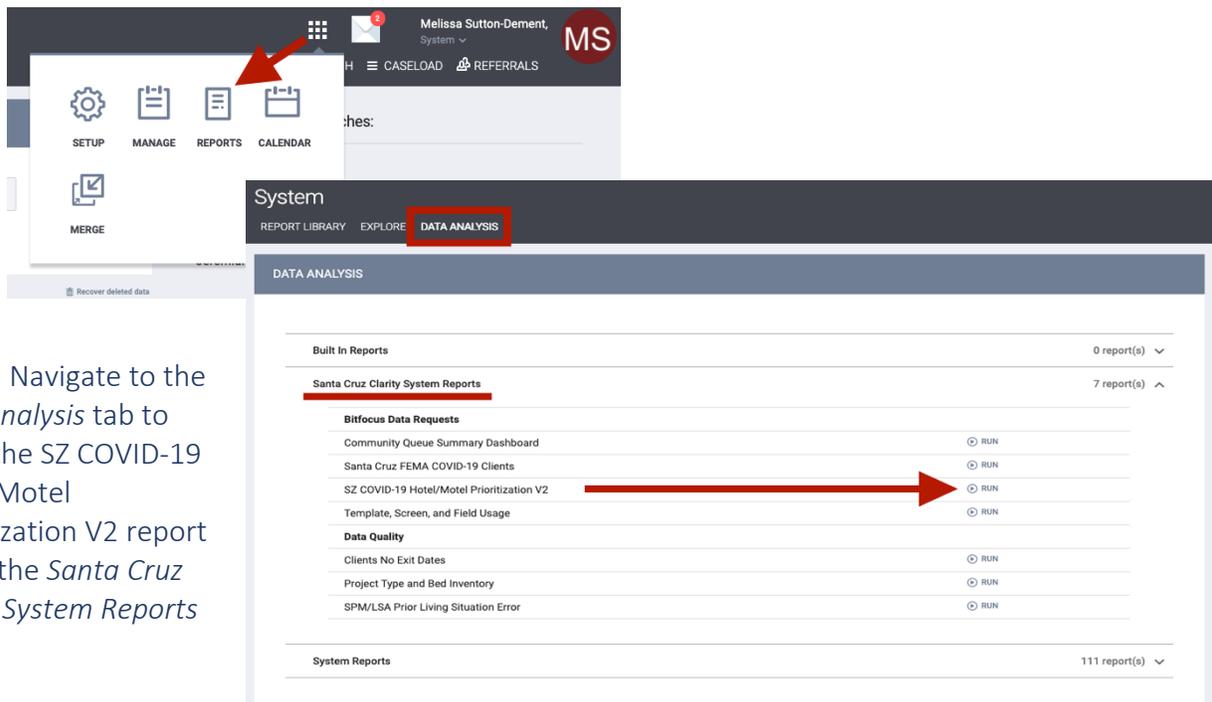
- 1) How to run and utilize the custom COVID-19 Hotel/Motel Prioritization report
- 2) How to locate eligible participants on the Community Queue
- 3) How to refer identified participant to participating ReHousing Wave program

To ensure quality service, we will also be covering two custom monitoring tools that ensures all participants receive an eligibility evaluation and that referrals sent by the matchmaker are being properly and fully processed.

Please note, your HMIS access role must be set to “Matchmaker” to engage this process.

Use the COVID-19 Hotel/Motel Prioritization Report

Step 1: Navigate to the *Reports* section.



The screenshot shows the Bitfocus system interface. The top navigation bar includes 'SETUP', 'MANAGE', 'REPORTS', and 'CALENDAR'. The 'REPORTS' menu item is highlighted with a red arrow. Below the navigation bar, the 'System' header is visible, with the 'DATA ANALYSIS' tab highlighted by a red box and a red arrow. The main content area displays a list of reports under the 'Santa Cruz Clarity System Reports' section. The report 'SZ COVID-19 Hotel/Motel Prioritization V2' is highlighted with a red arrow. Other reports listed include 'Community Queue Summary Dashboard', 'Santa Cruz FEMA COVID-19 Clients', 'Template, Screen, and Field Usage', 'Data Quality', 'Clients No Exit Dates', 'Project Type and Bed Inventory', and 'SPM/LSA Prior Living Situation Error'. Each report has a 'RUN' button next to it.

Step 2: Navigate to the *Data Analysis* tab to “run” the SZ COVID-19 Hotel/Motel Prioritization V2 report under the *Santa Cruz Clarity System Reports* folder.

Step 3: Apply any filters you may need and “rerun.”

Step 4: Locate the “gear” near the top right corner of the report to download the CSV file.

Step 5: Once downloaded, open up the zip file to access the “active_covid_shelter_households” file.

Step 6: Copy and paste data into an excel file if needed. Apply filter to top row should you require additional filtering, such as Veteran Status, COVID Shelter, Smart Path Score, etc.

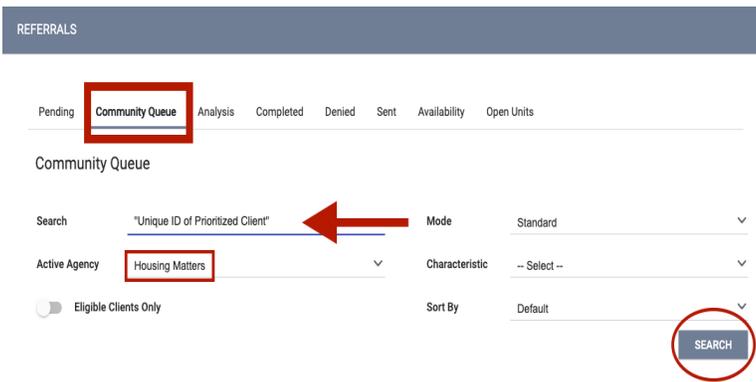
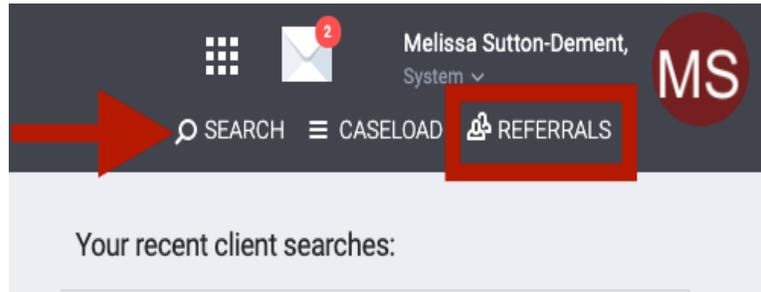
🎉 Success! 🎉

You have now identified the most vulnerable folks to be referred to the ReHousing Wave programs!

Locate and Refer Eligible Participants from Community Queue

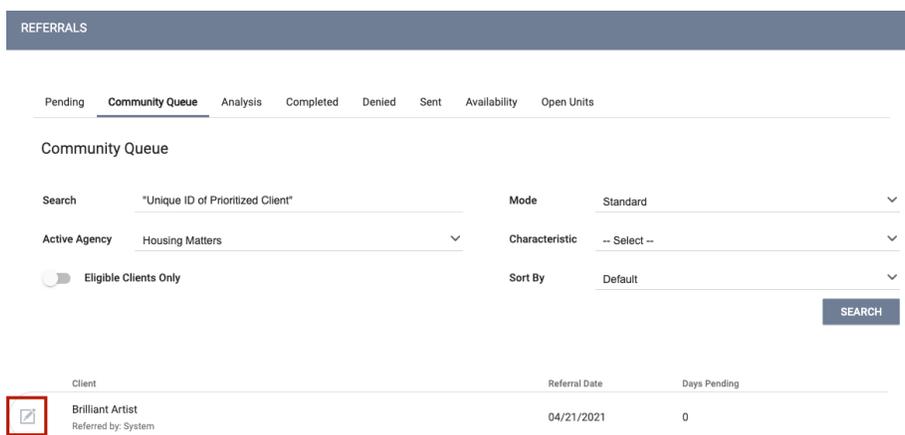
Step 1: Navigate to your “Search” home screen and select “Referrals.”

Step 2: Navigate to the *Community Queue* tab. Enter/paste the Unique ID of the prioritized client you wish to refer in to the “Search” field. The Unique ID is obtained from the targeted list created from the SZ COVID-19 Hotel/Motel Prioritization V2 report (see section above).



Step 3: Select the participating agency that you wish to refer to from the “Active Agency” dropdown menu and press “Search.” The current participating agencies are Abode Services, and Housing Matters.

Step 4: Select the “Edit” symbol to enter the client’s referral to the Community Queue.



Step 5: Re-assign to the desired program from the “Program” dropdown menu. These will be COVID-19 Rehousing Wave RRH – CV1 or COVID-19 Rehousing Wave – CV2 for either agency. You may also remove the client from the queue should you need. Be sure to save when updating either option.

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

REFERRAL: ASSIGN

Client: Leslie Houle
 Referred to: Community Queue
 Referring Agency: Housing Matters
 Referred Date: 12/18/2015 12:00 AM
 Days Pending: 1952 day(s)
 Qualified: Yes
 VI-SPDAT-V2 score: 13
 Last Activity: 10/09/2020 **CHECK-IN**
 Referred by Staff: Admin Admin ⓘ
 Navigator: **ASSIGN NAVIGATOR**
 Private:

SAVE CHANGES **CANCEL**

RE-ASSIGN

Program: COVID-19 Rehousing Wave RRH - CV1 **←**
SAVE CHANGES **CANCEL**

REMOVE FROM QUEUE

Reason for Removal: -- Select Reason -- **←**
 Queue Removal Date: 04/22/2021 

SAVE CHANGES **CANCEL**

Initiative Monitoring Tools Santa Cruz FEMA COVID-19 Clients

This report will help you identify the following:	Table 1: Clients who are actively enrolled in a FEMA COVID-19 shelter
	Table 2: Clients who do not qualify for triaged services as identified by “No Triage”
	Table 3: Clients actively enrolled in a FEMA COVID-19 shelter, but do not have a COVID-19 Shelter Referral Triage Tool assessment
	Table 4: Clients actively enrolled in a FEMA COVID-19 shelter, but do not have a pending Community Queue referral



To access this report, please navigate to the Data Analysis tab to “run” the Santa Cruz FEMA COVID-19 Clients report under the *Santa Cruz Clarity System Reports* folder.

REPORT LIBRARY EXPLORE DATA ANALYSIS

DATA ANALYSIS

Built In Reports 0 report(s) ▾

Santa Cruz Clarity System Reports 7 report(s) ▲

Bitfocus Data Requests

Community Queue Summary Dashboard	⊞ RUN
Santa Cruz FEMA COVID-19 Clients	⊞ RUN
SZ COVID-19 Hotel/Motel Prioritization V2	⊞ RUN
Template, Screen, and Field Usage	⊞ RUN

Data Quality

Clients No Exit Dates	⊞ RUN
Project Type and Bed Inventory	⊞ RUN
SPM/LSA Prior Living Situation Error	⊞ RUN

System Reports 111 report(s) ▾

Pending – In Process Referrals [Referral Statistics-Inbound Report]

This report will help you monitor referrals sent to agencies at remain set to “Pending – In Process” to ensure referrals from the Community Queue are being properly processed.

Step 1: Switch to the agency you’d like to monitor and navigate to reports.

The screenshot shows a user interface for Melissa Sutton-Dement, Housing Matters. The user is currently viewing the 'Abode Services' section for the 'Association of Faith Communities' at the 'Bill Wilson Center San Jose'. A navigation menu is open, showing options: SETUP, MANAGE, REPORTS, CALENDAR, ATTENDANCE, and MERGE. The 'REPORTS' option is highlighted with a red arrow.

Step 2: Navigate to the Data Analysis tab to “run” the Referral Statistics-Inbound report under the *Community and Referrals* folder.

REPORT LIBRARY

Favorite Reports	1 report(s) ▾
Data Quality Reports	6 report(s) ▾
Service Based Reports	13 report(s) ▾
Program Based Reports	20 report(s) ▾
Assessment Based Reports	4 report(s) ▾
Profile Screen Reports	1 report(s) ▾
Housing	5 report(s) ▾
HUD Reports	9 report(s) ▾
Administrator Reports	1 report(s) ▾
Community and Referrals	3 report(s) ▾
[RFRL-10] Referral Statistics - Inbound	⊞ RUN SCHEDULE MORE INFO ▾
[RFRL-104] Referral Statistics - Outbound	⊞ RUN SCHEDULE MORE INFO ▾
[RFRL-122] CE Community Queue Detail Report	⊞ RUN SCHEDULE MORE INFO ▾
Agency Management	4 report(s) ▾

Step 3: Identify the date range of sent referrals you wish to monitor, select Webpage as your output option and “Submit.”

Community and Referrals > [RFRL-103] Referral Statistics - Inbound

Report Date Range -

Report Output Format Web Page PDF Excel

Note: Report includes all referrals active at some point during the report period

SUBMIT

Step 5: Locate the “Breakdown of Referred to Programs” category at the bottom of the report and select the number under the “P/” (if any). The number is a hyperlink and will reveal the client(s+ still pending – in process and the amount of day they have been in that status.

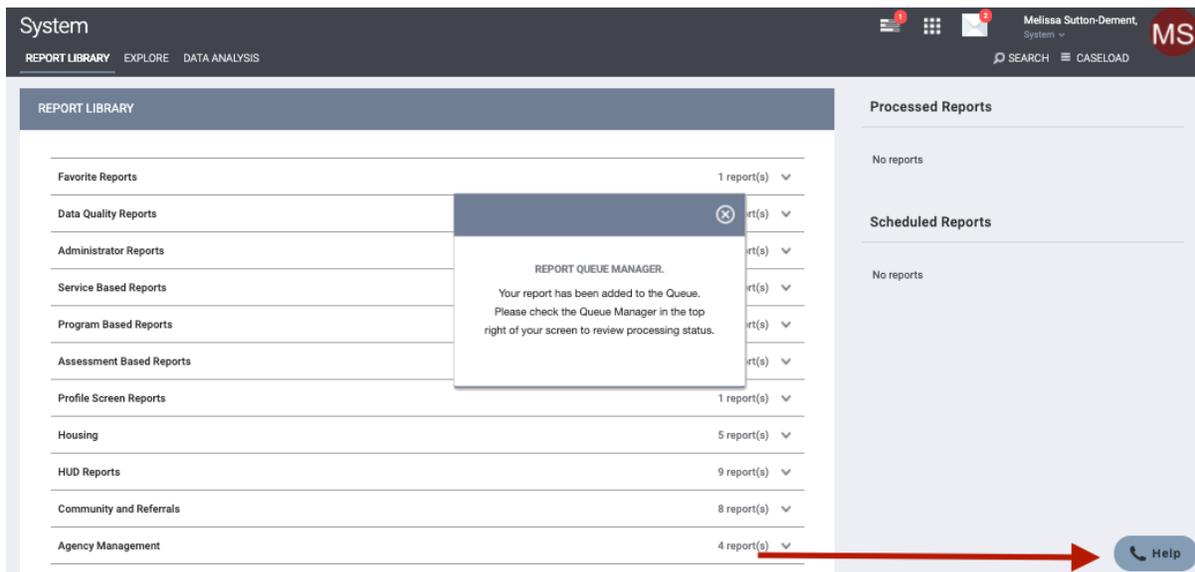
Breakdown of Referred to Programs

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

Emergency Shelter					
Agency Name	Program Name	P	P / I	A	D E
Housing Matters	COVID-19 Rehousing Wave RRH - CV1	1	1	1	8 2

Need Help?

If ever in doubt, the Help Desk is always a great place to start. You can reach them from 5 am to 5 pm by email at santacruz@bitfocus.com, by phone at (831) 713-2288, or directly within Clarity by selecting the “Help” icon on the bottom right side of any screen.



The screenshot shows the 'System' interface with a 'REPORT LIBRARY' on the left and 'Processed Reports' and 'Scheduled Reports' on the right. A 'REPORT QUEUE MANAGER' dialog box is overlaid in the center, stating: 'Your report has been added to the Queue. Please check the Queue Manager in the top right of your screen to review processing status.' A red arrow points from the bottom right of the report list to a 'Help' icon in the bottom right corner of the interface.



Please remember to take good care!