

## Yolo County Homeless Management Information System (HMIS) Community Queue Management Desk Guide

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Successful management of the Yolo County Community Queue in HMIS requires routine completion of the following steps.

1. **Press the Button**
  - a. Initial referral to the Community Queue
2. **Check-in**
  - a. Keep the individual active on the Community Queue by checking them in **every time** you interact with them.
3. **Monitor**
  - a. Regular review of assessed clients to ensure no one slips through the cracks.

Screenshots and step-by-steps instructions follow.

These instructions assume basic operating knowledge of HMIS, if you need further assistance please contact: [yolo-hmis@sacstepsforward.org](mailto:yolo-hmis@sacstepsforward.org).

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**STEP 1: PRESSING THE BUTTON - How to Refer to the Community Queue**

1. From the client's Profile, click on "ASSESSMENTS".
2. Identify the assessment you wish to refer to the queue, then click "ELIGIBILITY".
3. Click on "REFER DIRECTILY TO COMMUNITY QUEUE".
4. Click on "SEND REFERRAL".

Lindsayyy Test

PROFILE PROGRAMS HISTORY FILES CONTACT LOCATION NOTES SERVICES **ASSESSMENTS** REFERRALS

⚠ Release Of Information is Missing. Please add one to ensure compliance (Click here)

ASSESSMENTS

- Yolo VI-F-SPDAT Prescreen for Families [V2] START
- Yolo VI-SPDAT Prescreen for Single Adults [V2] START
- Yolo VI-Y-SPDAT Prescreen for Transition Age Youth (Age 18-24) START

ASSESSMENT HISTORY

Assessment Name	Completed	Details
VI-SPDAT Prescreen for Single Adults [V2] Training Agency	11/16/2018	VI-SPDAT-V2: 10 <span>☰ ELIGIBILITY</span>

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Lindsayy Test

PROFILE PROGRAMS HISTORY FILES CONTACT LOCATION NOTES SERVICES ASSESSMENTS REFERRALS

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## PROGRAM ELIGIBILITY DETERMINATION

### VI-SPDAT-V2 Score Summary

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	2	RISKS	2
SOCIALIZATION & DAILY FUNCTION	2	WELLNESS	4

VI-SPDAT-V2 PRE-SCREEN TOTAL 10

REFER DIRECTLY TO COMMUNITY QUEUE

Category -- All Categories -- Agency -- All Agencies -- Availability -- All -- SEARCH

## INELIGIBLE PROGRAMS

CANCEL



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The screenshot displays the user interface for the Yolo County Homeless Management Information System (HMIS). At the top, the user's name "Lindsayyy Test" is visible. Below it is a navigation menu with several options: PROFILE, PROGRAMS, HISTORY, FILES, CONTACT, LOCATION, NOTES, SERVICES, ASSESSMENTS, and REFERRALS. The REFERRALS option is highlighted with an orange box, and a large orange arrow points down to it from above. Below the navigation menu is a yellow warning banner that reads: "⚠ Release Of Information is Missing. Please add one to ensure compliance (Click here)". Underneath the banner is a dark blue header for the "REFERRAL: ADD" form. The form contains several fields: "Referred Program" with the value "Community Queue", "Referred to Agency" with the value "Community Queue", "Referring Agency" with the value "Yolo County Health and Human Services Agency", and a "Private" toggle switch which is currently turned off. Below these fields is a large text input area with a rich text editor toolbar containing icons for Bold (B), Italic (I), Bulleted List (1=, 2=), and a menu icon (☰). At the bottom of the form, there are two buttons: "SEND REFERRAL" and "CANCEL". The "SEND REFERRAL" button is highlighted with an orange box, and a large orange arrow points to it from the left.

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**STEP 2: CHECKING-IN - How to “Check-in”**

There are two ways to access a client’s active Community Queue referral. Both are detailed below.

**How to “Check-in” - Version 1**

1. From the Client’s record, click on **“HISTORY”**.
2. Locate the client’s active **Referral: Community Queue**.
3. Click on **“Edit”** next to the client you wish to check-in.
4. Click **“CHECK-IN”**.

Lindsayy Test

PROFILE PROGRAMS **HISTORY** FILES CONTACT LOCATION NOTES SERVICES ASSESSMENTS REFERRALS

⚠ Release Of Information is Missing. Please add one to ensure compliance (Click here)

HISTORY

Advanced Search Options View ▾

Service Name	Start Date	End Date	
 <b>Referral: Community Queue</b> Yolo County Health and Human Services Agency referral to Community Queue	12/10/2019	<b>Pending</b>	
Alcohol & Drug Abuse Services:Referred to AOD Services Training Agency	12/06/2019	12/06/2019	
RRH Rental Assistance:Rental Assistance for Families Training Agency	09/01/2019	09/01/2020	 
E/E Emergency Shelter Training Program - Sac CoC Training Agency	03/04/2019	<b>Active</b>	

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Yolo County Health and Human Services Agency

REFERRALS

Dashboard Pending **Community Queue** Analysis Completed Denied Sent

REFERRAL: ASSIGN

Client	Lindsayyy Test
Referred to	Community Queue
Referring Agency	Yolo County Health and Human Services Agency
Referred Date	12/10/2019 11:53 AM
Days Pending	0 day(s)
Qualified	Yes
VI-SPDAT-V2 score	10
Last Activity	12/10/2019 <b>CHECK-IN</b>
Referred by Staff	Emily Moran-Vogt
Navigator	<b>ASSIGN NAVIGATOR</b>
Private	<input type="checkbox"/>



SAVE CHANGES CANCEL

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## How to “Check-in” - Version 2

1. From the Home screen, click on “REFERRALS” under your user name.
2. Click on “Community Queue”.
3. Search for your client by name.
4. Click on “Edit” next to the client you wish to check-in.
5. Click “CHECK-IN”.

The screenshot displays the Yolo County Health and Human Services Agency interface. The top navigation bar includes a user profile for Emily Moran-Vogt and a 'REFERRALS' button. Below this, the 'Community Queue' tab is selected. The search form includes fields for 'Search' (test), 'Active Agency' (Yolo County Health and Human Services Agency), 'Mode' (Standard), and 'Sort By' (Default). A table lists the following client:

Client	Referral Date	Days Pending
Lindsayyy Test Referred by: Yolo County Health and Human Services Agency	12/10/2019	0

On the right, a donut chart shows 10 pending referrals. The interface is managed with Clarity Human Services.

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Yolo County Health and Human Services Agency

REFERRALS

Dashboard Pending **Community Queue** Analysis Completed Denied Sent

REFERRAL: ASSIGN

Client	Lindsayyy Test
Referred to	Community Queue
Referring Agency	Yolo County Health and Human Services Agency
Referred Date	12/10/2019 11:53 AM
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Qualified	Yes
VI-SPDAT-V2 score	10
Last Activity	12/10/2019 <b>CHECK-IN</b>
Referred by Staff	Emily Moran-Vogt
Navigator	<b>ASSIGN NAVIGATOR</b>
Private	<input type="checkbox"/>

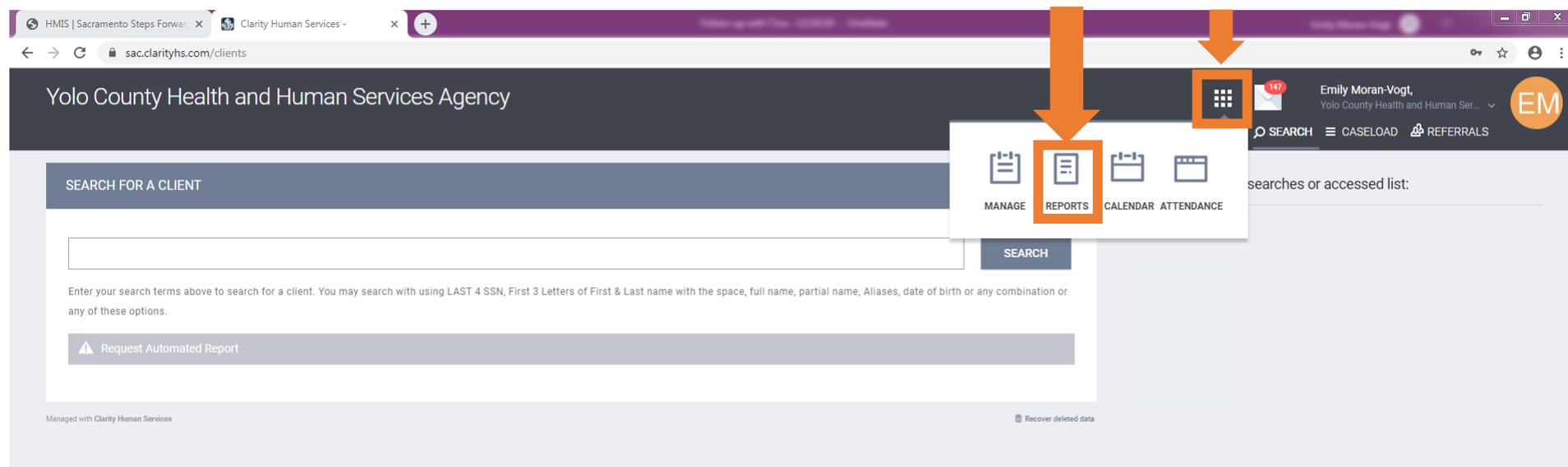
**SAVE CHANGES** **CANCEL**

## Yolo County Homeless Management Information System (HMIS) Community Queue Management Desk Guide

### STEP 3: MONITORING - How to Ensure Everyone Assessed Makes it on to the Community Queue

The Coordinated Entry Compliance Report allows you to view

1. From the Home screen, go to “**REPORTS**”, this will bring you to the “**REPORT LIBRARY**”.
2. Under the “**REPORT LIBRARY**” click on “**Community and Referrals**”.
3. Locate the “**Coordinated Entry Compliance Report**”, and click “**Run**”.
4. Select the Programs you are running the report for, the timeframe (recommended monthly), and the report output format you’d like. Then click “**Submit**”.
5. A small window will appear titled REPORT QUEUE MANAGER. The report will then be processed, be patient, it may take a few minutes depending on the size of your program and timeframe the report is run for.
6. Once the report is ready a small window will appear that states the REPORT IS READY, click “**OPEN**”. You can also access a report already run by clicking on the Report Queue Manager function at the top right of your screen. See screenshots below.
7. The report will tell you which clients enrolled in your program have a VI-SPDAT completed and whether they are on the Community Queue. Program managers and/or direct service staff should review at least monthly to ensure that all clients who need a VI-SPDAT are assessed and active on the Community Queue.



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Yolo County Health and Human Services Agency

REPORT LIBRARY EXPLORE DATA ANALYSIS

REPORT LIBRARY

Administrator Reports	12 report(s) ▾
Agency Management	3 report(s) ▾
Assessment Based Reports	1 report(s) ▾
<b>Community and Referrals</b>	6 report(s) ▾

[GNRL-401] VI-SPDAT Details	⊙ RUN   📅 SCHEDULE   MORE INFO ▾
[RFRL-101] Referral Statistics	⊙ RUN   📅 SCHEDULE
[RFRL-102] Referral Outcomes Statistics	⊙ RUN   📅 SCHEDULE
[RFRL-110] VI-SPDAT Referral Detail	⊙ RUN   📅 SCHEDULE
[RFRL-120] Community Queue Detail	⊙ RUN   📅 SCHEDULE
[RFRL-121] Coordinated Entry Compliance Report	⊙ RUN   📅 SCHEDULE

# Yolo County Health and Human Services Agency

REPORT LIBRARY EXPLORE DATA ANALYSIS PREVIEW

## REPORT LIBRARY

Community and Referrals > [RFRL-121] Coordinated Entry Compliance Report

Program(s)

Choose...

- All
- Bringing Families Home - RRH
- CalWORKS - Temporary Homeless Assistance (THA) - ES
- CalWORKs Housing Support Program - RRH

Report Date Range

11/01/2019  - 12/31/2019 

Report Output Format

Web Page  PDF  Excel

SUBMIT

### Quick Tip

You can select more than one program to include in your reports by holding the Shift key as you click on the individual programs.

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Yolo County Health and Human Services Agency
Emily Moran-Vogt, Yolo County Health and Human Ser...

REPORT LIBRARY EXPLORE DATA ANALYSIS
SEARCH CASELOAD

REPORT LIBRARY

Administrator Reports	12 report(s) ▼
Agency Management	3 report(s) ▼
Assessment Based Reports	1 report(s) ▼
Community and Referrals	6 report(s) ▼
Data Quality Reports	1 report(s) ▼
Email Reports	3 report(s) ▼
Housing	2 report(s) ▼
HUD Reports	7 report(s) ▼
Program Based Reports	19 report(s) ▼
Service Based Reports	9 report(s) ▼

**REPORT QUEUE MANAGER.**

Your report has been added to the Queue. Please check the Queue Manager in the top right of your screen to review processing status.

**REPORT IS READY.**

Report "[RFRL-121] Coordinated Entry Compliance Report" is completed.

OPEN

[ close all ]

Processed Reports

No reports

Scheduled Reports

No reports

## SAMPLE REPORT

<b>Coordinated Entry Compliance Report</b>				<b>Yolo County Health and Human Services Agency</b>										
				Date range: 11/01/2019 - 11/30/2019										
Type	Unique Identifier	Client Name	HoH	DOB	Program	Entry Date	Exit Date	Assigned Staff	Referral	VI-SPDAT Date	VI-SPDAT Score	VI-SPDAT Agency	In Com. Queue	
Group	ABCDEFGH I	Test, Test	No	10/10/1900	Test Outreach Program	11/01/2019		Case Manager	No	10/28/2019	10	Yolo County H HSA	No	

This client had a VI-SPDAT completed on 10/28/2019, however they are not currently on the Community Queue. **STEP 1** needs to be completed and then **STEP 2**, every time this client interacts with this program.