



councilofcommunityservices.org/hmis-user-training-center/

Coordinated Entry Training

CE MATCHMAKER STAFF- ASSIGNING TO HOUSING PROGRAMS

Updated August 2026 for new Clarity User Interface

The Matchmaking Process

- SEARCH for a client on the COMMUNITY QUEUE
- REASSIGN the client to a HOUSING PROGRAM
- NOTIFY the REFERRAL MANAGER at the receiving agency

SEARCH



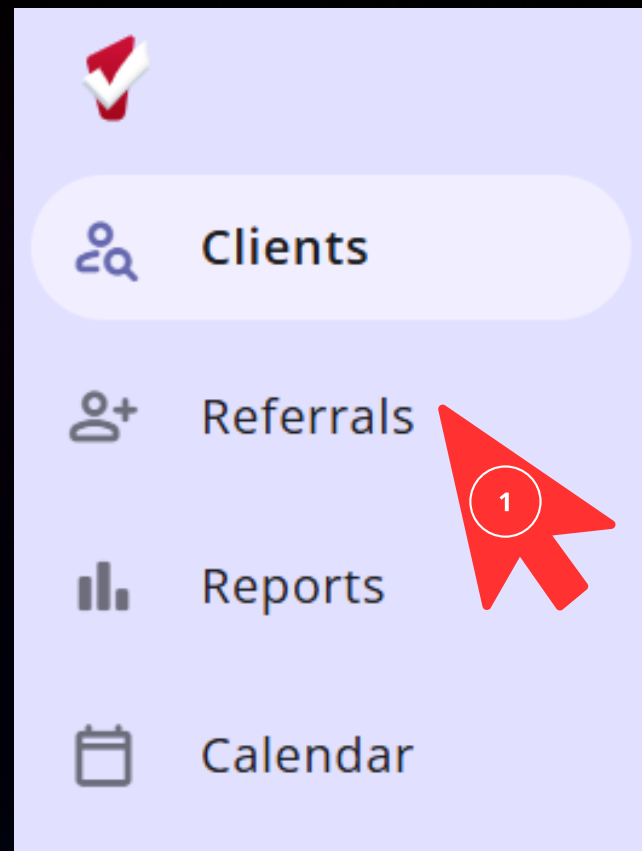
```
graph TD; A[SEARCH] --> B[REASSIGN]; B --> C[NOTIFY];
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The diagram illustrates a three-step process. It begins with a blue rounded rectangle labeled 'SEARCH'. A white arrow points down from this box to a purple rounded rectangle labeled 'REASSIGN'. Another white arrow points down from the 'REASSIGN' box to a green rounded rectangle labeled 'NOTIFY'. The steps are arranged vertically on the right side of the slide, corresponding to the bullet points on the left.

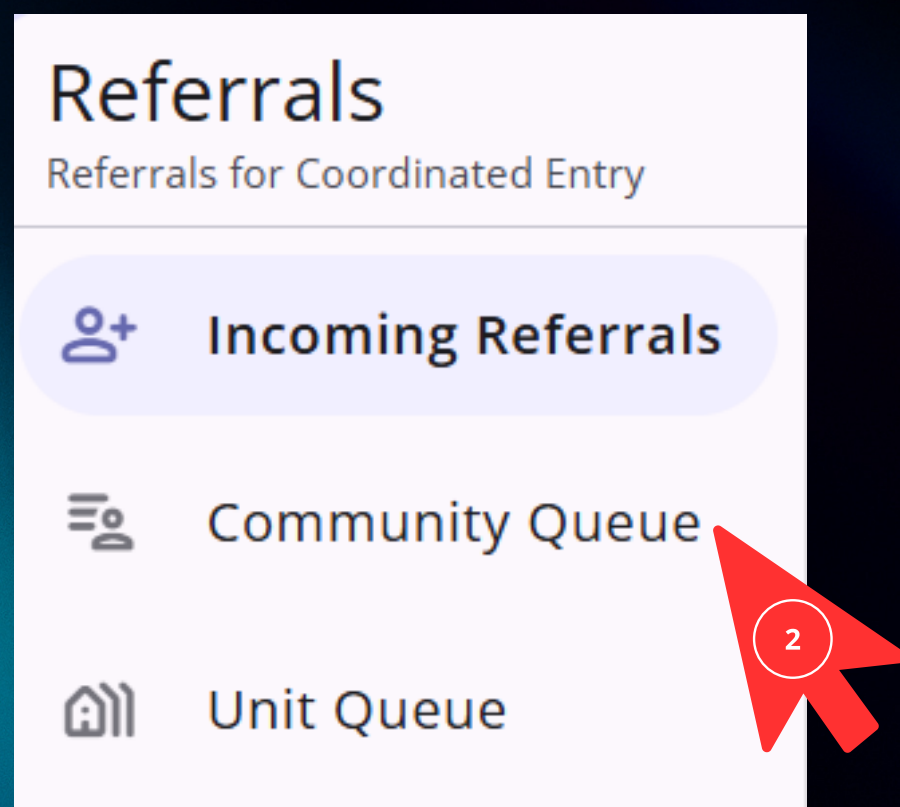
REASSIGN

NOTIFY

SEARCH FOR A CLIENT ON THE CQ

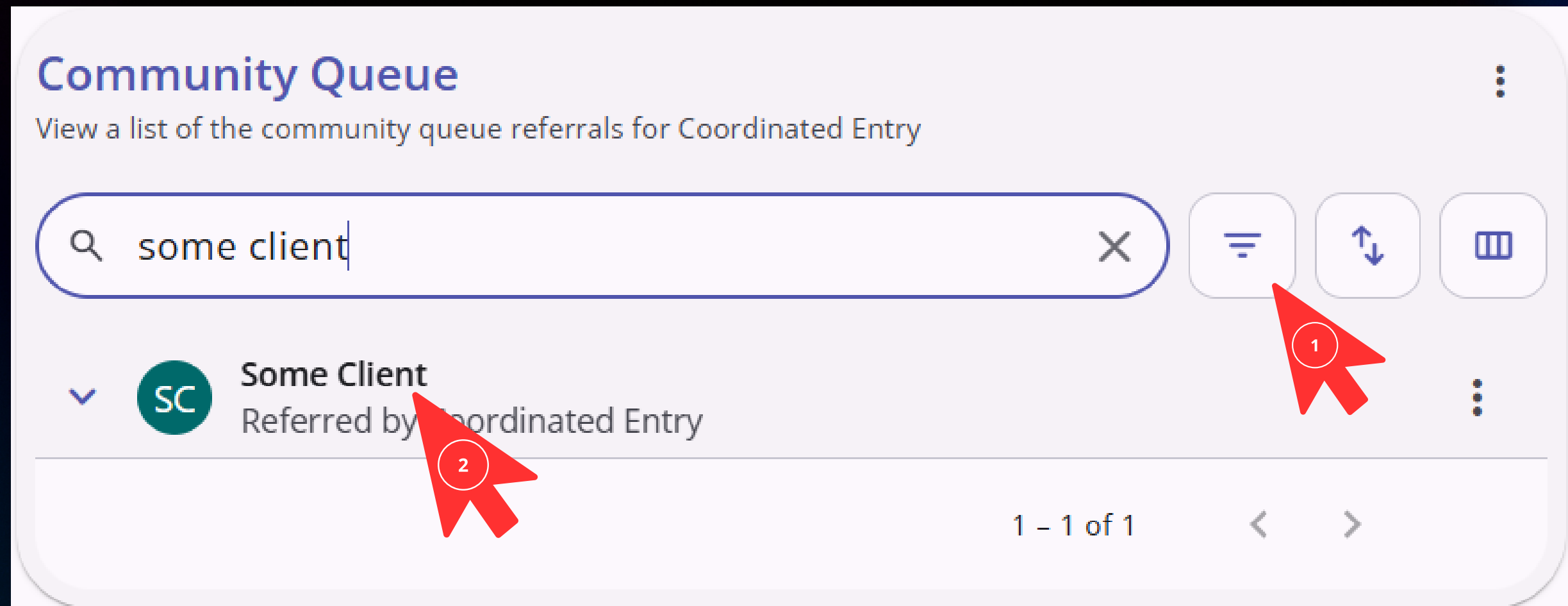


1. From any location in HMIS, CLICK the “Referrals” menu item on the left-hand side of the screen to access the Coordinated Entry page.



2. Once the “Referrals” page loads, CLICK the “Community Queue” link in the Referrals Menu to open the “Community Queue Search” screen.

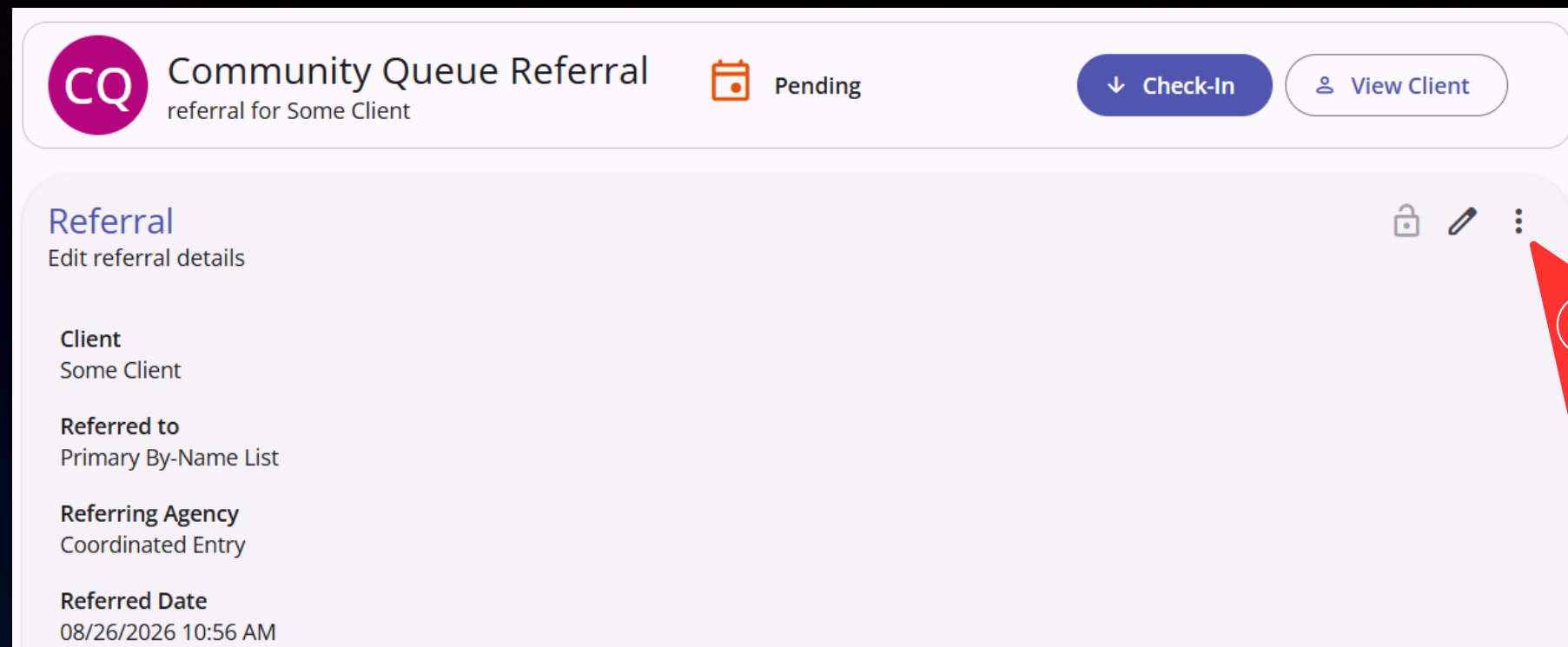
SEARCH FOR A CLIENT ON THE CQ



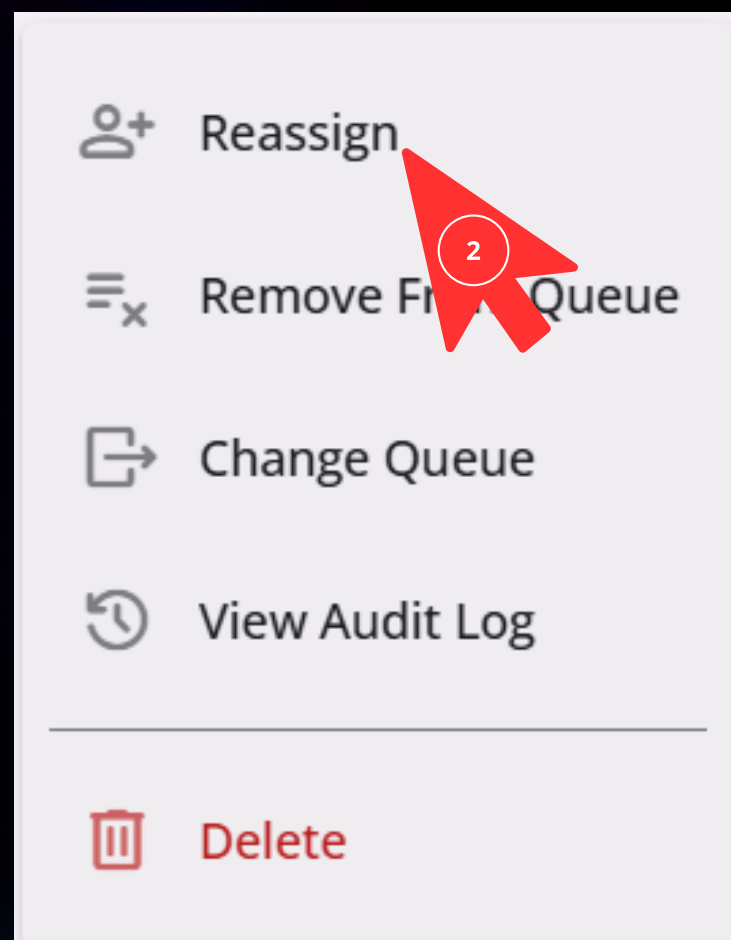
1. When the “Community Queue Search” box loads, type the clients name in the box.

2. When the client’s name loads beneath the Search Box, CLICK on their name to navigate to their “Client Referral” page.

REASSIGNING THE CLIENT TO A HOUSING PROGRAM



The screenshot shows the 'Community Queue Referral' interface. At the top, there's a header with the 'CQ' logo, the text 'Community Queue Referral' and 'referral for Some Client', a 'Pending' status indicator, and two buttons: 'Check-In' and 'View Client'. Below the header, the main content area is titled 'Referral' with a subtitle 'Edit referral details'. On the right side of this area, there are three icons: a lock, a pencil, and a three-dot menu. A red arrow with the number '1' points to the three-dot menu icon. The left sidebar contains the following information: 'Client: Some Client', 'Referred to: Primary By-Name List', 'Referring Agency: Coordinated Entry', and 'Referred Date: 08/26/2026 10:56 AM'.

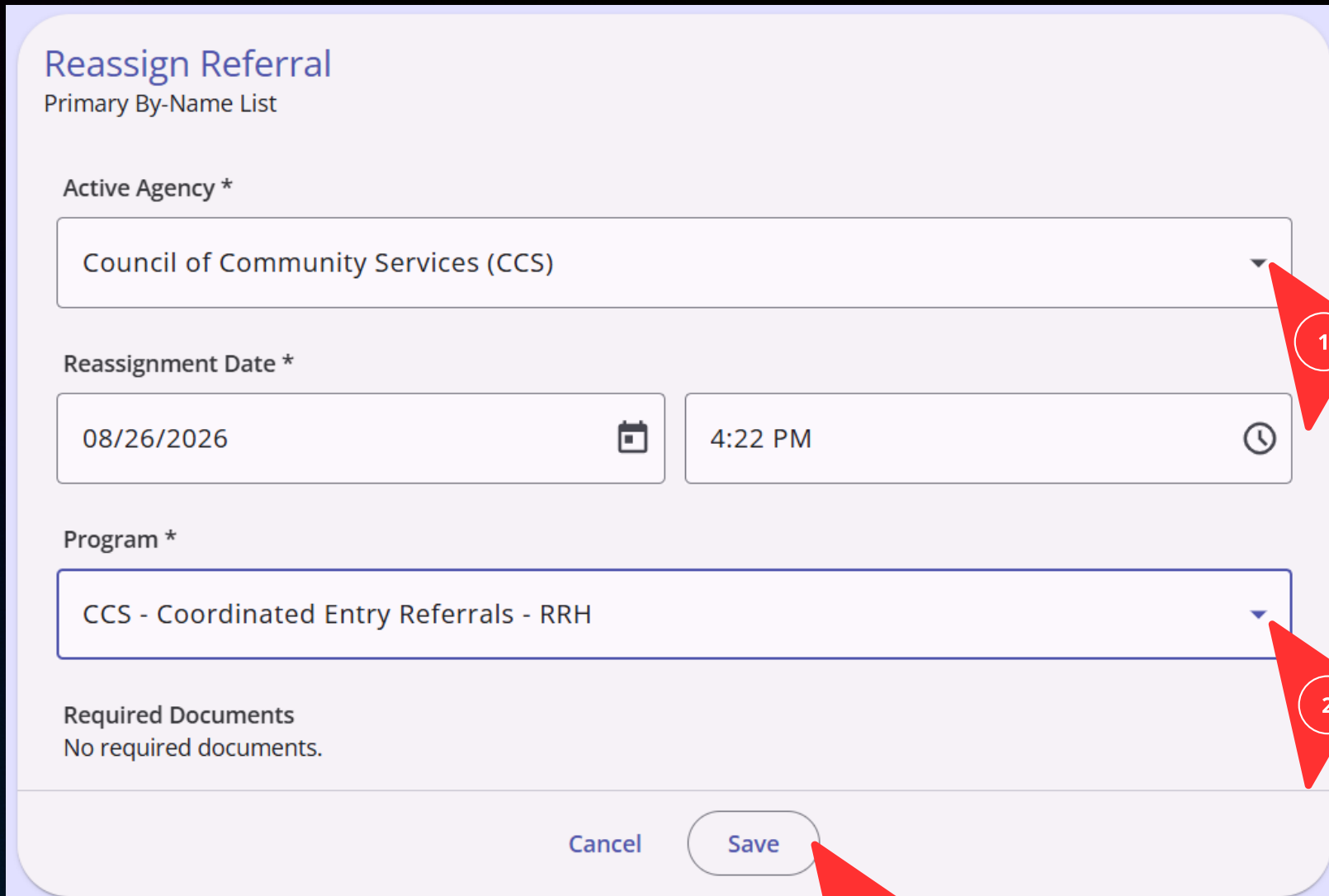


This screenshot shows the 'More Actions' menu that appears after clicking the three-dot icon. It contains four options: 'Reassign' (with a person icon), 'Remove From Queue' (with a list icon), 'Change Queue' (with a folder icon), and 'View Audit Log' (with a clock icon). A red arrow with the number '2' points to the 'Reassign' option. At the bottom of the menu, there is a red 'Delete' button with a trash can icon.

1. Once the “Client Referral” page loads, CLICK the “three dots” on the right-hand side of the page to open the “More Actions” menu.

2. In the “More Actions” menu, SELECT “Reassign” to open the “Reassign Referral” page.

REASSIGNING THE CLIENT TO A HOUSING PROGRAM



Reassign Referral
Primary By-Name List

Active Agency *

Council of Community Services (CCS)

Reassignment Date *

08/26/2026 4:22 PM

Program *

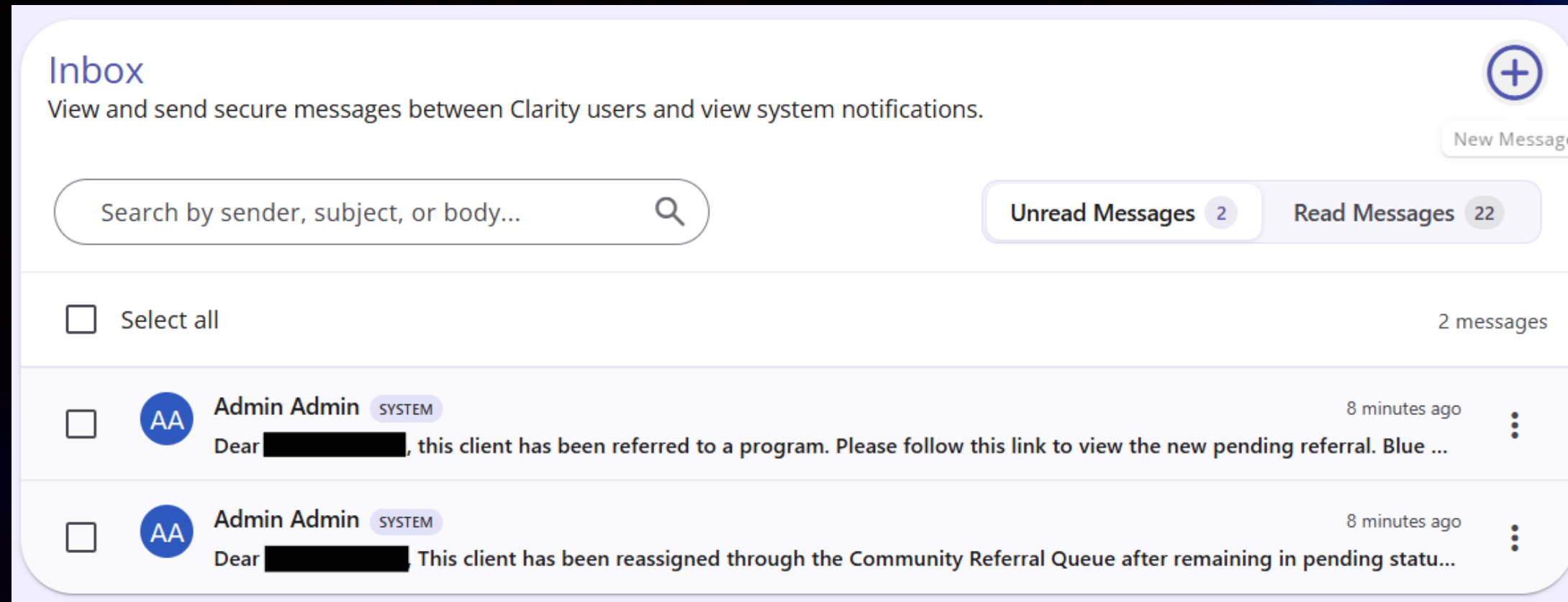
CCS - Coordinated Entry Referrals - RRH

Required Documents
No required documents.

Cancel Save

1. On the “Reassign Referral” page, first SELECT from the picklist the “Active Agency” you want to reassign the client to.
2. Next from the “Program” picklist, SELECT the specific housing program you are reassigning the client to.
3. CLICK “Save” and a “Task Summary” box will appear.
4. CLICK “Complete” and you will return to the “Program Referral” screen.

NOTIFYING THE REFERRAL MANAGER



If the Program Reassignment completes correctly, then the Referral Manager at the housing program should receive a notification of the referral in both their internal HGIS Inbox and an email sent to the email address listed in their HGIS profile settings. Matchmaker Staff may want to follow up with Referral Managers to ensure referrals are received.

QUESTIONS?



Brian Burnette

Director of Housing Services/HMIS System Administrator

brianb@councilofcommunityservices.org

Ben Bristoll

HMIS Database Administrator

benb @councilofcommunityservices.org