

Community List Management in HMIS

For Community Queue / Prioritization Lists

All of the Group/Community Wait Lists work in pretty much the same way and have the same management functions. Each of them has their own folder in the Provider tab and for this folder to appear the current organization must be a part of the Provider Group that is maintained by DCED.

The screenshot shows the ClientTrack interface for the Eastern Continuum Community Queue. The left sidebar has a 'Community Queue' menu item highlighted. A callout box on the right contains the following text: "To access your Community Wait List, select the appropriate continuum folder and then select the Wait List option in the menu to view on your screen." Red arrows point from the callout box to the 'Community Queue' menu item and the 'Wait List' option in the dropdown menu.

Each Group List has a number of filters in which to view the data at the top of the screen. By default the list of sorted by the “Added to Waitlist” date, with the most recent addition on top.

Service Needs – this filter will show any client that has that service need associated to their wait list record and exists in the service needs column. The service needs are based on their initial eligibility but represents the types of service(s) the client needs or is requesting.

SPDAT/Screening Type and Score – within the main group list screen each client will have their latest assessment score listed, whether it is from the VI-SPDAT or other Screening Tool, as well as the general type (i.e. Single vs. Family) for informational purposes.

Wait List Actions:

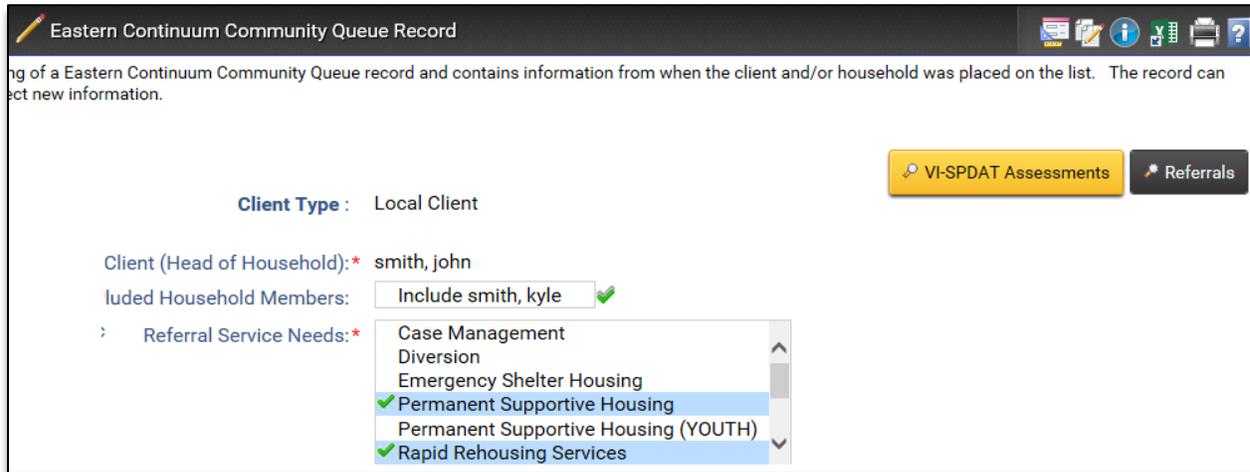
Each wait list record will contain a number of actions that will allow users to perform management functions to track each of their needs and outcomes. Each list will have some customized language, but the functions listed work the same and are detailed below.

The screenshot shows a table with columns: Added to Waitlist, Client (Head of Household), Adult Males, Adult Females, Child Males, and Child Females. A record for Johnson, John is highlighted. A context menu is open over the record, showing the following actions: Review Community Queue Record, Waitlist Contacts, Client's Dashboard, and Delete Waitlist Record.

Added to Waitlist	Client (Head of Household)	Adult Males	Adult Females	Child Males	Child Females
02/03/2017	Johnson, John	1	1	1	0
				1	0
				0	0
				0	0

Review Wait List Record – this is the option to review and edit not only the wait list record but the outcomes section as well. The review list record also displays options at the top of the page to display the client’s recorded coordinated screening assessments and referrals for information purposes.

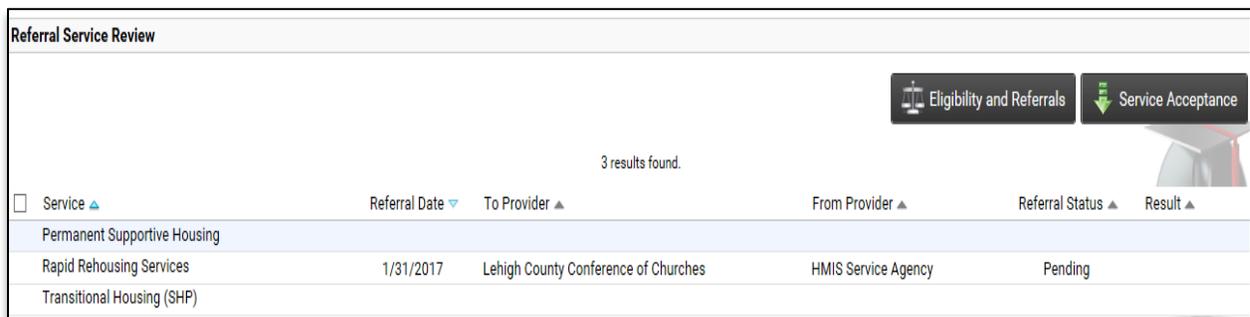
Each client on the list will have options to review their Screening Assessments (VI-SPDAT or Screening Tool) and Referrals, by using the buttons at the top of the page. Each will load a summary screen that displays any records they may have and they can be opened to fully detail each assessment or referral transaction.



Please note that the Waitlist status is also placed on this screen and it is detailed in its own section at the bottom of this guide.

The Referral Service Review (or outcome) section shows each of the client’s Service Needs selected during placement (hopefully from the eligibility engine) and any referrals that have been sent for that service for tracing purposes.

Note: no referral can be send or accepted from this screen, as referral need to be handled using the referral management functions.



There are 2 options available to assist in meeting those service needs, the Eligibility and Referrals (Referrals for the West) and Service Acceptance options. Both have different processes and different reasons to be used.

Eligibility and Referrals – for the Eastern Community Queue, this option is the exact same option found on the bottom of the VI-SPDAT screens and loads the combination eligibility and referrals functions on the same screen.

Referrals – for the Western Prioritization List, this option will simple load a standard Referral process and allow the user to send a single referral. This option can be used multiple times if needed.

These options are used for when the user wants to send referrals for this client to Providers outside their current organization. The best example for this would be a Community Queue Specialist or Manager viewing the list and sending out referrals to community providers on behalf of this client.

Service Acceptance – for both group lists, this option will allow the user to perform a “self-import” to their current organization, by recording a referral to themselves (which is accepted automatically), having the system import the client(s) associated and allow the user to begin a new enrollment.

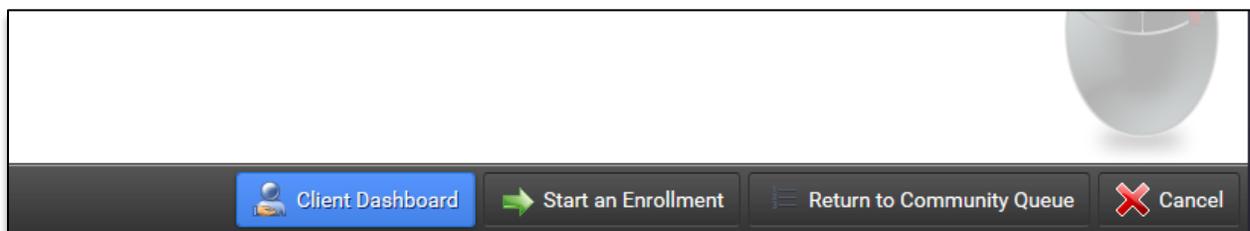
This option is used for when a user sees a client with a service need(s) and believes that their organization can meet that need. The best example for this would be an individual Provider viewing the list, looking for clients that they can serve directly, and when finding one, would use this option to download them from the list (the system will walk them all the automated features).

Once enacting the Service Acceptance, the feature prompts for the date and service, plus an optional result of that service. Once completed hit “Accept from Queue” and the system does the rest.

To complete the action, enter in the Referral Date and select the Referral Service in which you will be providing to the client and optionally enter in an optional result if it is known. Once those elements are completed select **Accept from Queue**. The screen will refresh and provide you with three different navigation options in which to choose, and include [Client Dashboard](#), [Start an Enrollment](#) and [Return to Community Queue](#).

Client Name: smith, john
Referral Date: * 01/31/2017 
Referral Service: * Permanent Supportive Housing 
Result: Service provided 

Once the self-referral/import is performed, the system will prompt the user to do one of the following, which is go to the Client Dashboard, Start and Enrollment or Return to Community Queue (or Prioritization List).



Waitlist Contacts – this option allows reviews to enter and view contacts made with waitlist clients and are shared universally with all persons that can access the list. This helps provide collaborate information for communicating with the client and the results of those contacts.

Client’s Dashboard - is only available for those clients that are “owned” by the current organization, so this option will show up on some clients and not others depending on the user looking at the list.

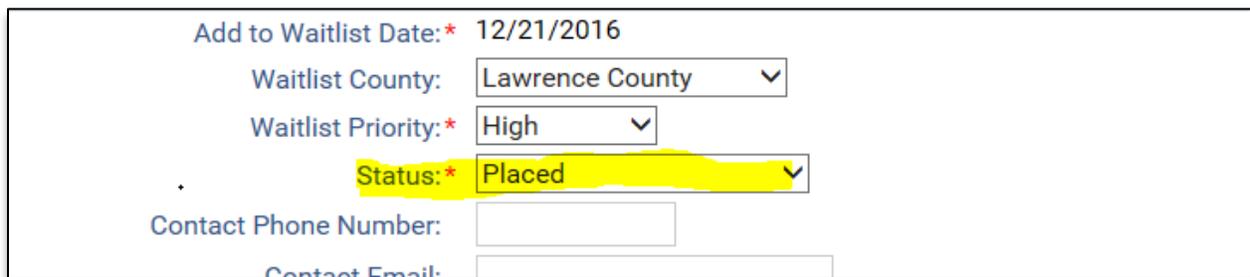
It is the same principle of owned clients vs. global clients on the Client tab and client searches, for global clients we can provide the user access to their wait list record but not general client record, and is the reason this function does not show up.

Delete Waitlist Record – this option should only be used when a client was mistakenly placed on the list (i.e. a client was placed twice and is duplicated) and needs to be deleted. For instances where the client is no longer active on the list, please use the record status option detailed below.

Waitlist Status:

The Group Wait List records all have a status, which denotes whether they are “Active” and on the main list or “Historical” and non-active and removed from the list. For now, this waitlist status needs to be updated manually by those that review the list and its clients.

By loading the Wait List record, using the above mentioned “Review List Record” function, you can view and/or update this status on that screen.



The screenshot shows a form with the following fields and values:

- Add to Waitlist Date: * 12/21/2016
- Waitlist County: Lawrence County (dropdown)
- Waitlist Priority: * High (dropdown)
- Status: * Placed (dropdown, highlighted in yellow)
- Contact Phone Number: (text input)
- Contact Email: (text input)

The following statuses indicate an active record:

- New
- Review

The following statuses indicate a historical or non-active record:

- Placed
- Closed
- Turned Away

Once a client has been placed or had the appropriate service needs fulfilled or is no longer active on the list (for whatever reason), Wait list reviewers will need to update this status appropriately.

The main Group Wait List screen contains a standard filter for **Type**, which defaults to Active, and includes those list clients with an active status. The Type also has a filter for Historical which includes those list clients with a non-active status.

Service Needs: -- SELECT --

County: -- SELECT --

Type: Active

Client Search (Last, First):