Bitfocus

Community Queue Configuration Checklist

Community Queue configuration is a multi-step process that includes assessment configuration, community queue configuration, program setup, and access roles. Use the checklist to ensure all components are properly configured and workflows and referrals function as expected. For more information about any of the components visit help.bitfocus.com.

1 Assessment Configuration

Before configuring your Community Queue, determine which assessments will connect households to each queue. Each Community Queue should have one or more assessments associated and the same assessment can be used for multiple queues. Complete these steps to connect the assessment to the queue:

☐ **Status**: Set Assessment Status to active

☐ **Assessment Processor:** If scoring, assign Assessment Processor

☐ **Eligibility Engine**: On to generate referrals to the Community Queue

☐ **Coordinated Entry:** On if your queue is associated with coordinated entry

2 Community Queue Configuration

REFERRAL SETTINGS

☐ **Community Referral Queue**: toggled on

☐ **Multiple Community Queues**: toggled on (If applicable)

COMMUNITY QUEUE SETTINGS

☐ **Status:** Before clients are added to the queue, set status to active

☐ **Allow Referral to Community Queue:** On to send referrals to the queue

☐ **Assessments:** Add assessments used to generate referrals to the Community Queue to the assessment section

☐ **Prioritization List:** On if the Community Queue is a prioritization list

☐ **Program Availability Management:** On

PROGRAM CONFIGURATION

3 Receiving Referrals from the Queue

☐ **Project Receives CE Referrals:** Should be toggled on

☐ **Responsible Staff Members**: Add staff who should receive referral notifications

☐ **Eligibility**: Off, unless eligibility criteria is configured and being used for the program

☐ **Community Queues**: For programs receiving referrals from the Community Queue, add the Community Queue to the program configuration

☐ **Availability**: Set to Full Availability or Limited Availability.

4 Referring to the Queue

☐ **Enable Assessments**

Enable the assessments for all agencies participating in coordinated entry data collection

☐ **Add Program Level-Assessment**

Add the assessments to all programs completing coordinated entry data collection or referring clients to the Community Queue

5 The final step in Community Queue configuration is ensuring that all staff have access roles necessary to complete the required actions. The chart below highlights access roles that should be enabled for assessors, matchmakers, and providers. Please see the [Access Role Glossary](#) for more information.

Access Role	Description	Assessors	Matchmakers	Providers
Referrals	Access to Referrals and the Direct Referrals tab	✓	✓	✓
Create Referrals	Access to create referrals	✓	✓	
Referrals: Pending	Access to Pending tab			✓
Referrals: Completed	Access to Completed tab			✓
Referrals: Denied	Access to Denied tab			✓
Referrals: Analysis	Access to Analysis tab on the Referrals screen			✓
Referrals: Availability	Access to Availability tab			✓
Refer Directly to Community Queue	Access to refer clients to the Community Queue	✓		
Referrals: Community Queues	Access to Community Queue tab		✓	
Referrals Matchmakers	Ability to make referrals from Community Queue		✓	
Assessments	Access to Assessments tab	✓		
Create Assessments	Access to create assessments	✓		
Edit Assessments	Access to edit assessments	✓		