

QRG – Add assessments outside of workflow

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WHO THIS GUIDE IS FOR 1

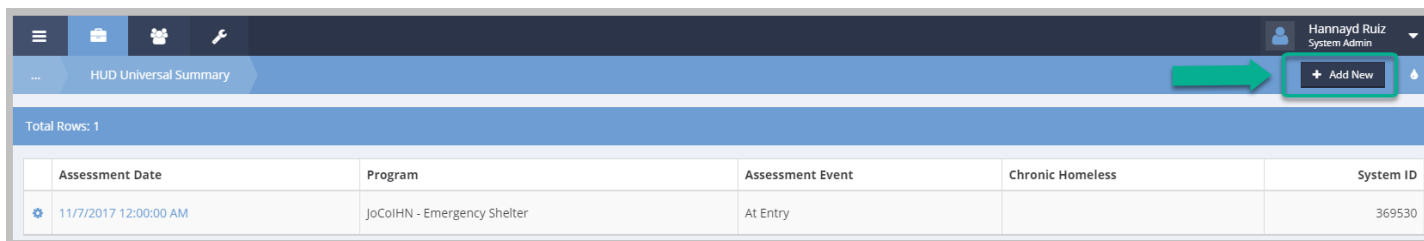
STEPS TO RESOLVE 1

WHAT IS A QRG – QRG stands for **Quick Reference Guide**. Quick Reference Guides are short 1-8 page documents that provide concise practical information and advice on specific topics. Sometimes known as “cheat sheets” quick reference guides are designed for users who know the material or task but need something in front of them to remind them of the steps.

WHO THIS GUIDE IS FOR – Users who are cleaning up client records that are missing assessments.

STEPS TO RESOLVE

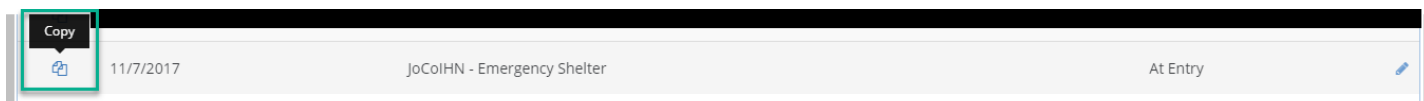
STEP 1 – Assessments > Go to the missing assessment type (HUD Universal, HUD Prog, etc.) > Add New



STEP 2 – Select the arrow to show drop down selection of current assessments



STEP 3 – Select corresponding assessment that should be part of the same enrollment (“JoCoIHN – Emergency Shelter”) by selecting **COPY**



STEP 4 – Select the copy of the assessment you want to create

Copy Assessments		
Date	Program Name	Type
11/7/2017	JoColHN - Emergency Shelter	At Entry

STEP 5 – Update **Assessment Type** and **Assessment Date** to **Copy Assessments**

Select Program Name

Program Name: JoColHN - Emergency Shelter

Assessment Type: At Exit Select type

Assessment Date: 11/07/2017 📅 Edit date

Copy Assessments
Cancel