QRG – Add assessments outside of workflow

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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

<table>
<thead>
<tr>
<th>Date</th>
<th>Program Name</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/7/2017</td>
<td>JoColHN - Emergency Shelter</td>
<td>At Entry</td>
</tr>
</tbody>
</table>

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