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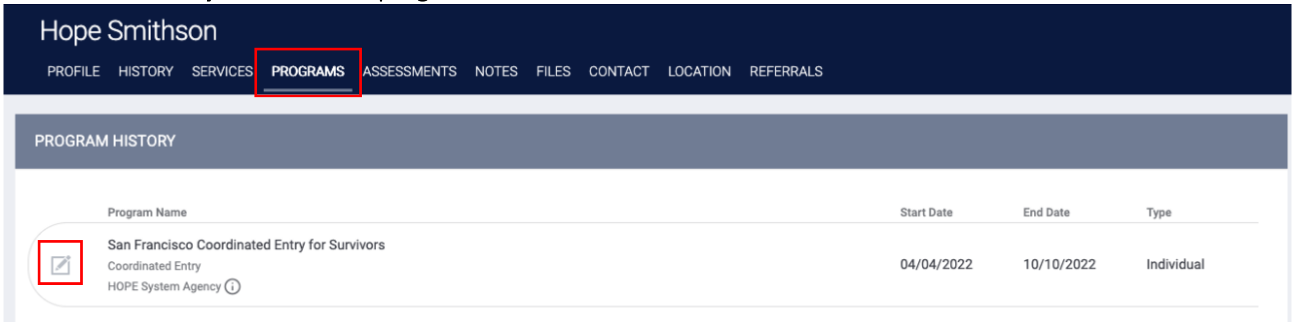
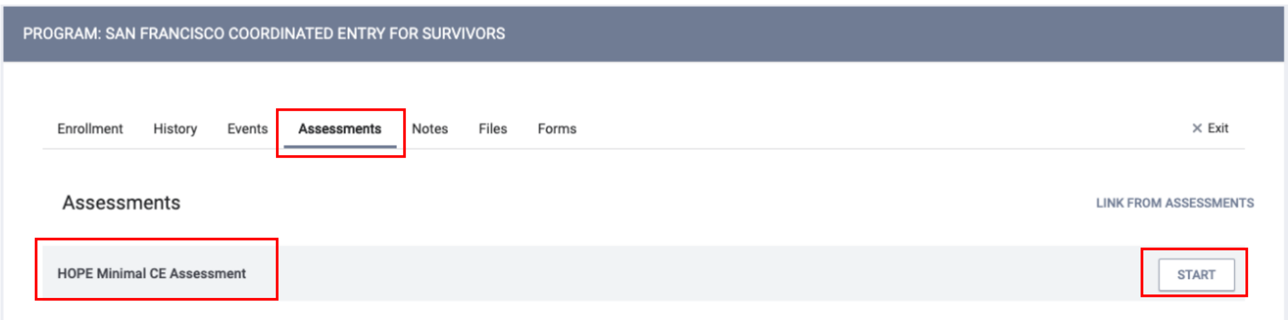
Step 1: Complete the assessment

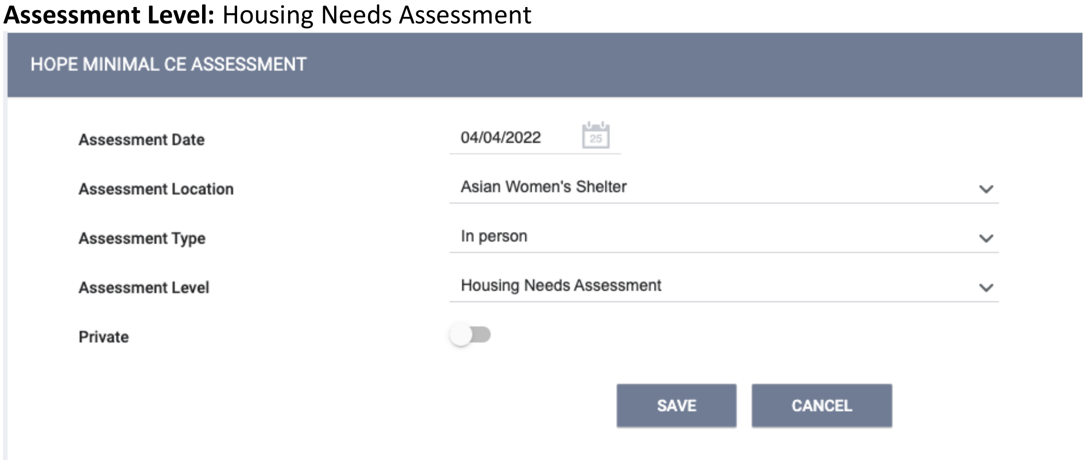
1. Once on the client profile, click on the PROGRAMS tab and click to edit the client's enrollment in the **San Francisco Coordinated Entry for Survivors** program



2. Now select the Assessments tab and click to START the **HOPE Minimal CE Assessment**



3. You'll now be prompted to answer 4 questions:
   a. **Assessment Date:** MM/DD/YYYY
      i. Should be backdated to reflect the client's program start date *(Tip: You can quickly find this by referencing the Program Start Date in the side bar)*
   b. **Assessment Location:** [the name of your agency]
   c. **Assessment Type:** [select whether you completed an assessment with the client in person, over the phone, or virtually (i.e. a Zoom meeting)]
   d. **Assessment Level:** Housing Needs Assessment



Do not mark Private *(this toggle makes it viewable by you only; note that our system only allows client assessments created by you to be viewable by your agency staff)*

4. Click 'Save'

5. Step 1 of 3 (completing the assessment) is now complete. You can always view this assessment later by returning to the Assessments tab in the client's CE for Survivors enrollment and viewing 'Assessment History'.

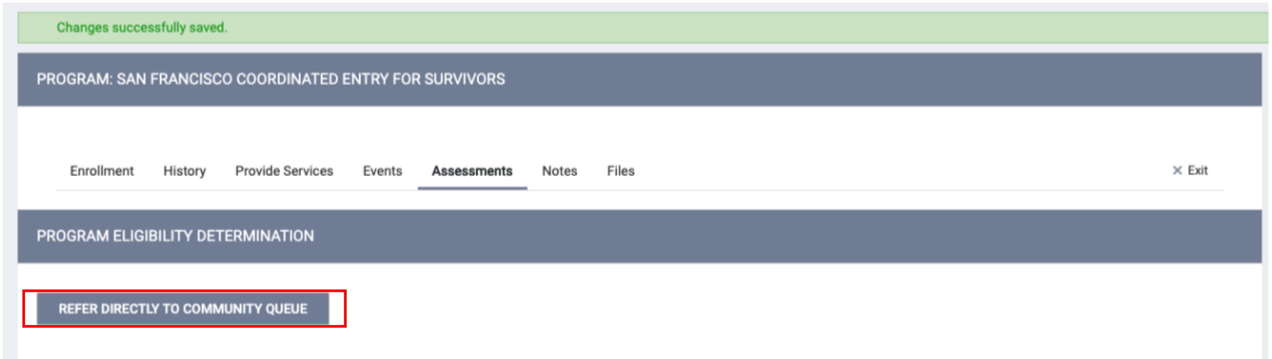
Step 2: Add the Client to the Community Queue

Note that you can only add a client to the queue after you've completed the HOPE Minimal CE Assessment

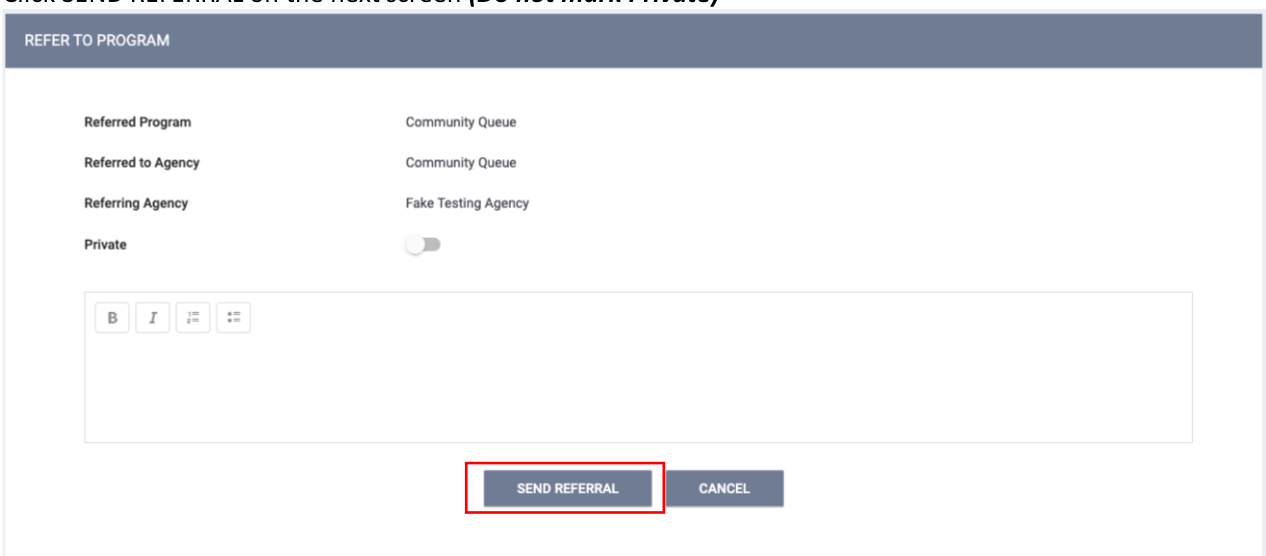
Immediately after completing the CE Assessment:

After clicking 'Save' on the assessment, you will be brought to the Program Eligibility Determination screen

1. Click the REFER DIRECTLY TO COMMUNITY QUEUE button



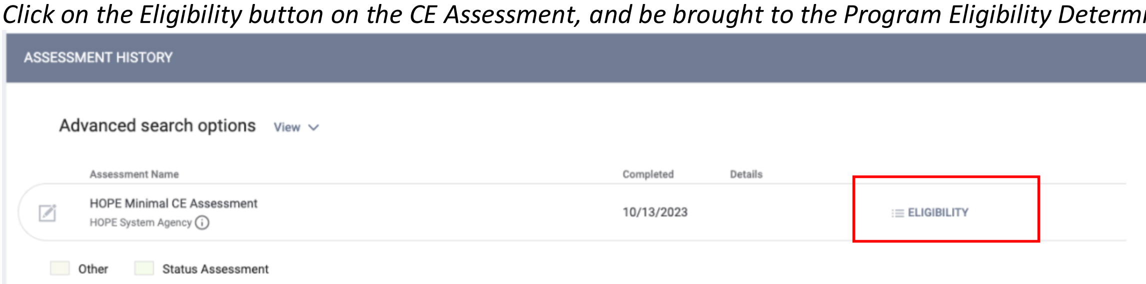
2. Click SEND REFERRAL on the next screen ***(Do not mark Private)***



3. Step 2 of 3 is complete. This client is now on the queue.

Tip: If you didn't add the client to the queue immediately after completing the assessment, not to worry! You can always add them later by following these steps:

1. *Click on the Assessments tab within the client's CE for Survivors enrollment and view the client's completed CE Assessment under 'Assessment History'*
2. *Click on the Eligibility button on the CE Assessment, and be brought to the Program Eligibility Determination screen*



3. *Follow Step 2 sub-steps 1-3 above*

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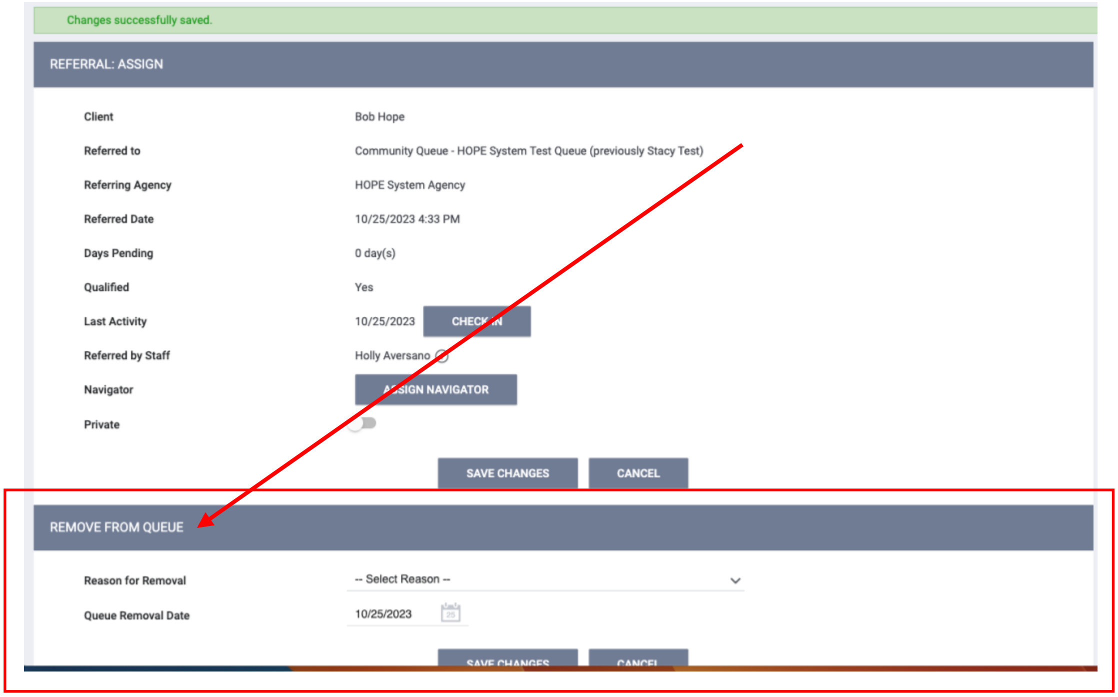
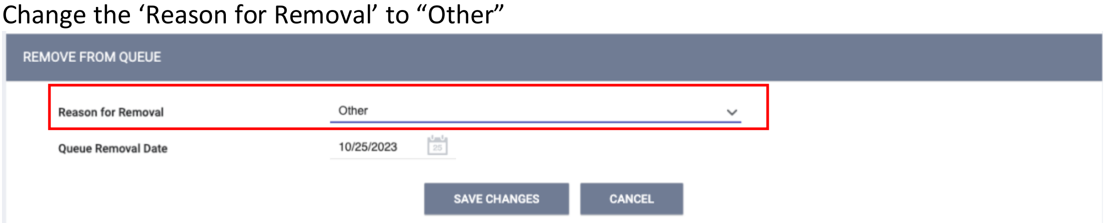
Step 3: Remove the client from the Queue

Immediately after adding the client to the Queue:

1. Scroll down to the ‘Remove from Queue’ section of screen



2. Change the ‘Reason for Removal’ to “Other”

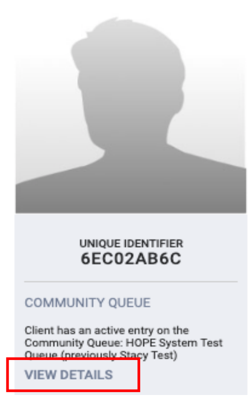


3. Click ‘Save Changes’

4. Step 3 of 3 is complete. Client is now removed from the queue!

Tip: If you didn’t remove the client to the queue immediately after adding them to the queue, you can always remove them later by following these steps:

1. *Go to the client profile*
2. *Click “View Details” under the client’s picture and unique identifier*



3. *Follow Step 3 sub-steps 1-4 above*