Quick Guide to Add Clients to a Stabilization Room

Created For: San Francisco Outreach Team - SFHOT   **Last Updated**: January 2021

Adding Eligible Client	*First, switch agency to San Fran Adult Coordinated Entry Agency*
	1. **Adding an Eligible Client**
	    Go to client profile → Assessments → Programs tab → Click on Eligibility
	2. **Referral to the Stabilization Room Queue**
	    Turn on toggle to refer to Stabilization Rooms Queue → Refer Directly to Community Queue → Send Referral

Adding an Opening	*Next, switch agency to SFHOT.* 3. **Adding an Opening for your Stabilization Program** Referrals Tab → Availability → Click on the dropdown arrow next to your program → Add Single Opening → Customize Your Open Unit

Make a Referral to an Open Unit	4. **Start Your Referral**
	    Referrals Tab → Community Queue → Stabilization Rooms Queue → Active Agency: HSH: SFHOT → Find and edit client
	5. **Finishing Your Referral**
	    Scroll down to re-assign → Select your program → Select your open room → Save changes

Accept the Referral and Enroll the Client	6. **Accept the Referral and Enroll the Client** Go to Client Profile → Programs Tab → Specific Stabilization Room Program → Keep toggle on → Enroll the client → Fill out Enrollment Details

Services and Exit	7. **Add a Service**
	    Client Profile → Program Tab → Edit (Appropriate Program) → Provide Services
	8. **Exit Client**
	    Programs Tab → Edit Program → Exit Client

Reports	9. **Program-Based Reports**
	    [GNRL-106] Program Roster and [GNRL-220] Program Details Report
	10. **Service Summary Report**
	    [GNRL-104] Service Summary