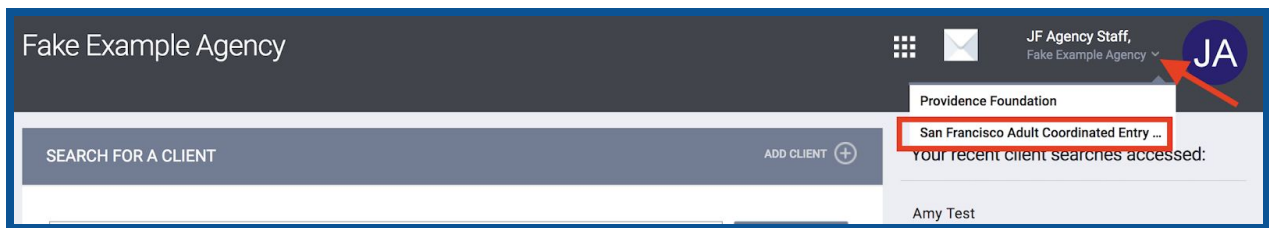


How to Record the Adult CE Primary Assessment

This workflow reflects the necessary steps needed to create a client profile, enroll the client in an Adult Coordinated Entry Program, and administer the Adult CE Primary Assessment. The purpose of recording an Adult CE Primary Assessment is to record an adult's self-reported homelessness history when entering the San Francisco Homeless Response system at a Coordinated Entry Access Point.

Search or add new profiles

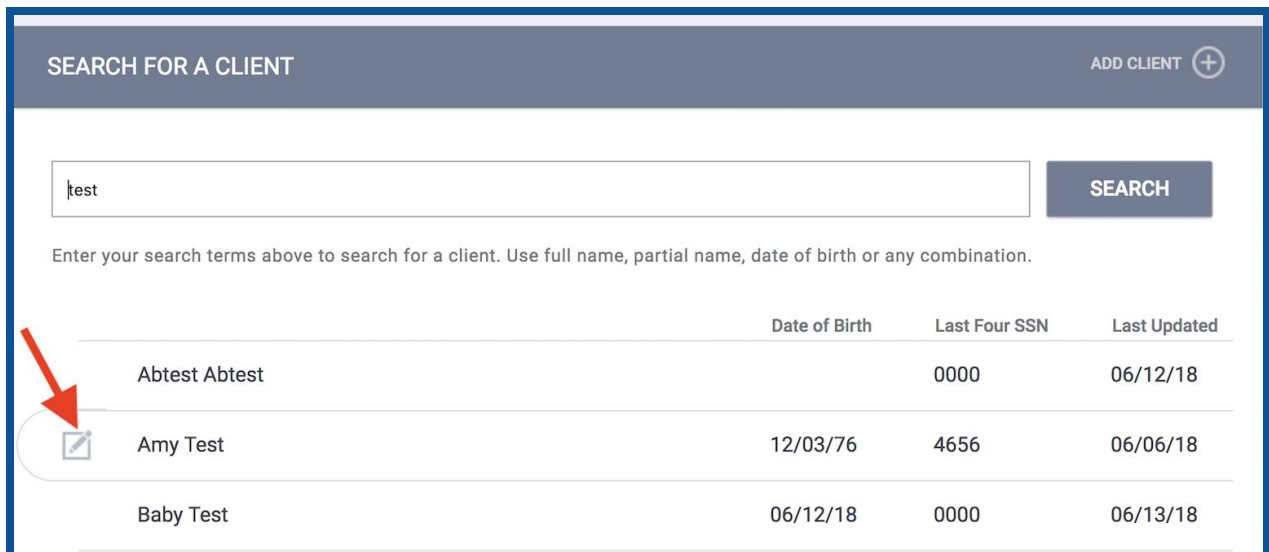
- 1) Log in to the ONE System and click on the dropdown arrow to change to the "San Francisco Adult Coordinated Entry Agency".




The screenshot shows the top navigation bar of the ONE System. On the left, it says "Fake Example Agency". On the right, it shows the user's name "JF Agency Staff, Fake Example Agency" and a profile picture with the initials "JA". A dropdown menu is open, showing "Providence Foundation" and "San Francisco Adult Coordinated Entry ..." (highlighted with a red box). Below the dropdown, it says "Your recent client searches accessed:" and lists "Amy Test".

- 2) Next, search for the person in the search box. Search can be conducted by entering a partial first name, partial last name, Date of Birth, or Social Security number. Search for the person before creating a new profile to avoid creating duplicate profiles in the ONE System.

If you find the person in search, click edit to the left of the person's name to open the profile screen. Go to step 8.



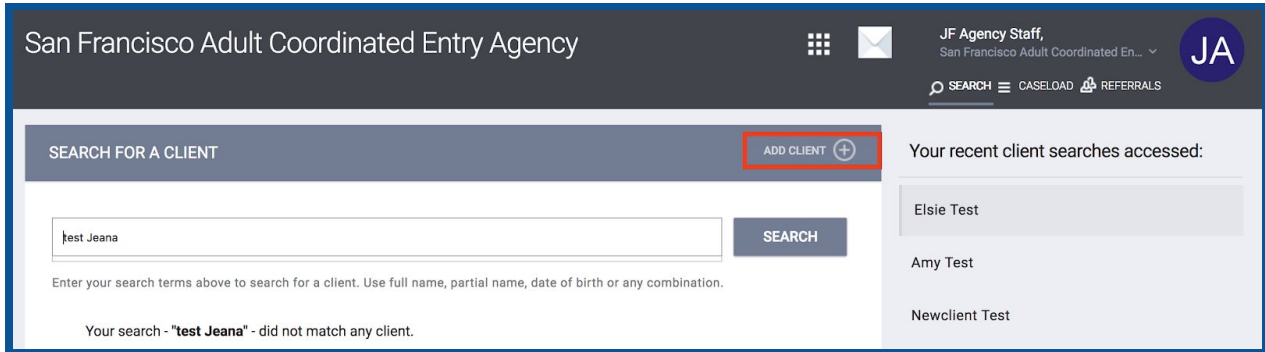
The screenshot shows the search results page. At the top, there is a search bar with the text "test" and a "SEARCH" button. Below the search bar, there is a table of search results. The table has columns for "Name", "Date of Birth", "Last Four SSN", and "Last Updated". The results are as follows:

	Date of Birth	Last Four SSN	Last Updated
Abtest Abtest		0000	06/12/18
 Amy Test	12/03/76	4656	06/06/18
Baby Test	06/12/18	0000	06/13/18

A red arrow points to the edit icon next to "Amy Test".

How to Record the Adult CE Primary Assessment

- 3) If the client does not appear, click “ADD CLIENT” and complete the profile screen for this person.



San Francisco Adult Coordinated Entry Agency

JF Agency Staff, San Francisco Adult Coordinated En... JA

SEARCH CASELOAD REFERRALS

SEARCH FOR A CLIENT **ADD CLIENT** (+)

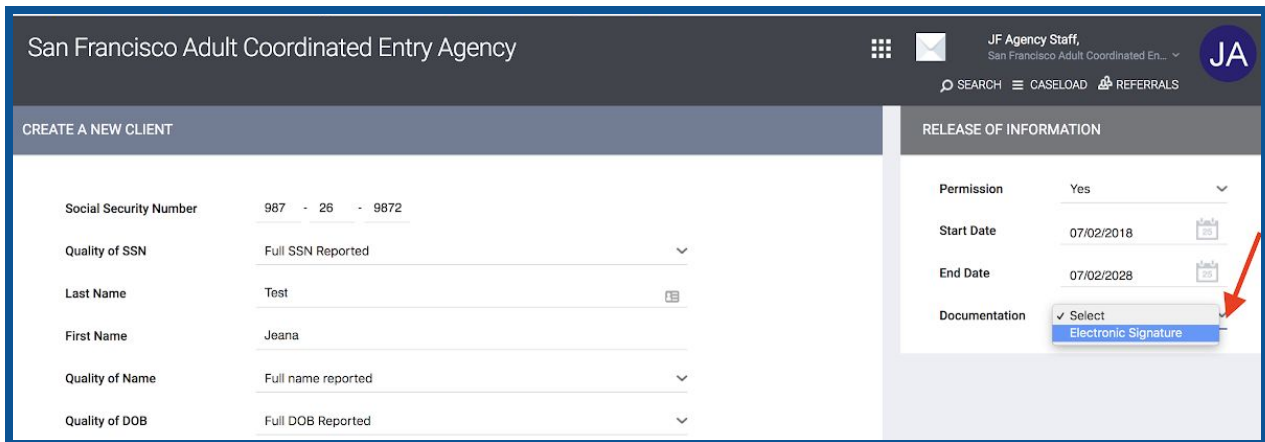
test Jeana SEARCH

Your recent client searches accessed:

- Elsie Test
- Amy Test
- Newclient Test

Your search - "test Jeana" - did not match any client.

- 4) Enter the profile information and change the Release of Information. Change the Documentation dropdown to “Electronic Signature”. Next, click “E-Sign Document”.



San Francisco Adult Coordinated Entry Agency

JF Agency Staff, San Francisco Adult Coordinated En... JA

SEARCH CASELOAD REFERRALS

CREATE A NEW CLIENT

Social Security Number 987 - 26 - 9872

Quality of SSN Full SSN Reported

Last Name Test

First Name Jeana

Quality of Name Full name reported

Quality of DOB Full DOB Reported

RELEASE OF INFORMATION

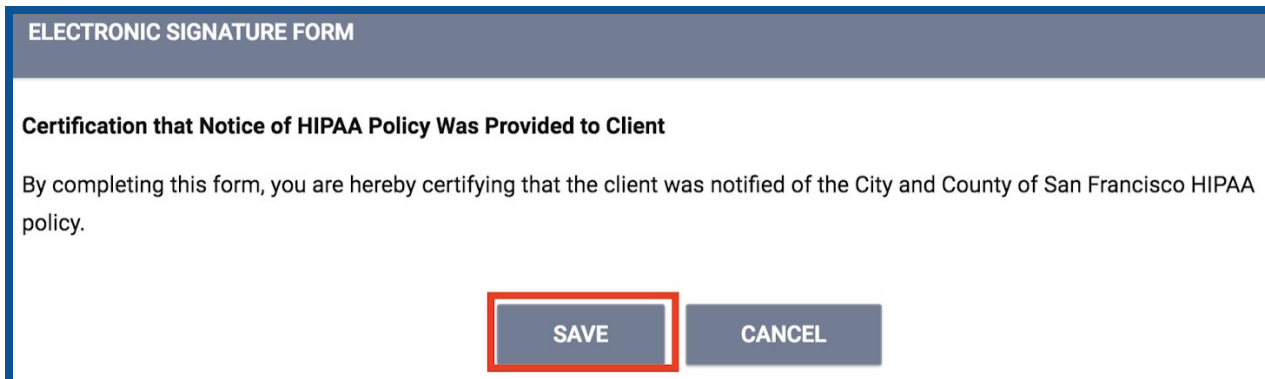
Permission Yes

Start Date 07/02/2018

End Date 07/02/2028

Documentation Select **Electronic Signature**

- 5) The Electronic Signature Form will appear. Click “Save”.



ELECTRONIC SIGNATURE FORM

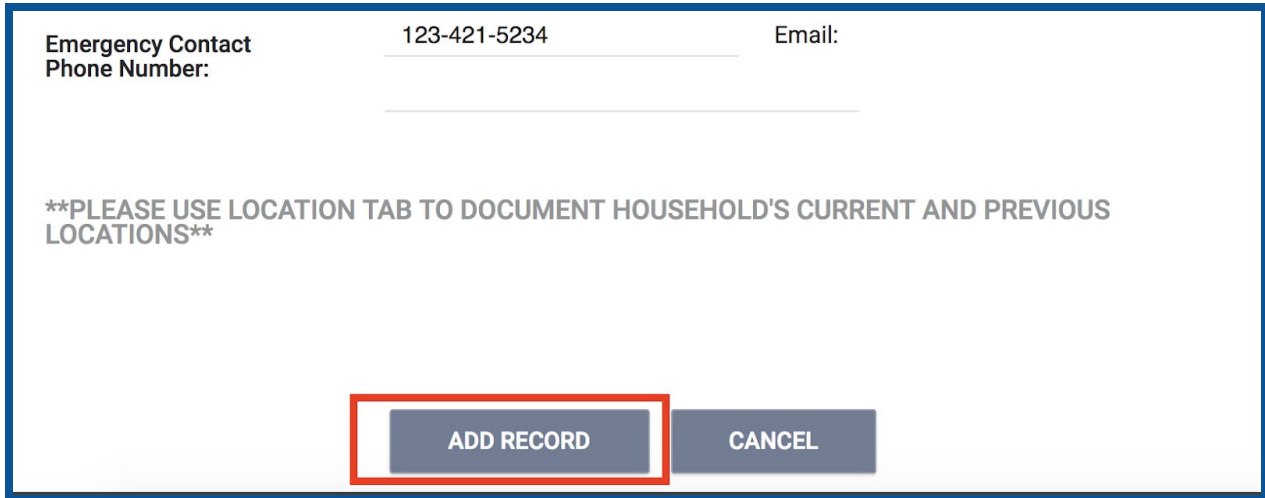
Certification that Notice of HIPAA Policy Was Provided to Client

By completing this form, you are hereby certifying that the client was notified of the City and County of San Francisco HIPAA policy.

SAVE CANCEL

How to Record the Adult CE Primary Assessment

6) Scroll down to the bottom of the profile screen and select Add Record.

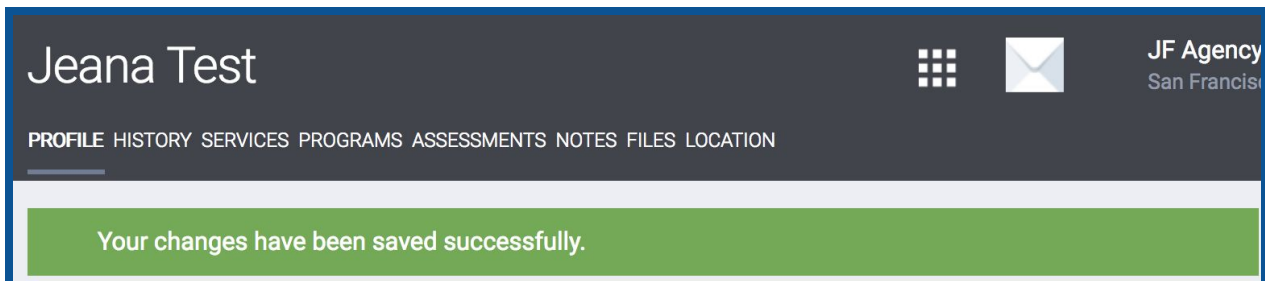


Emergency Contact Phone Number: 123-421-5234 Email:

PLEASE USE LOCATION TAB TO DOCUMENT HOUSEHOLD'S CURRENT AND PREVIOUS LOCATIONS

ADD RECORD CANCEL

7) A message will appear to confirm that the profile was created.



Jeana Test

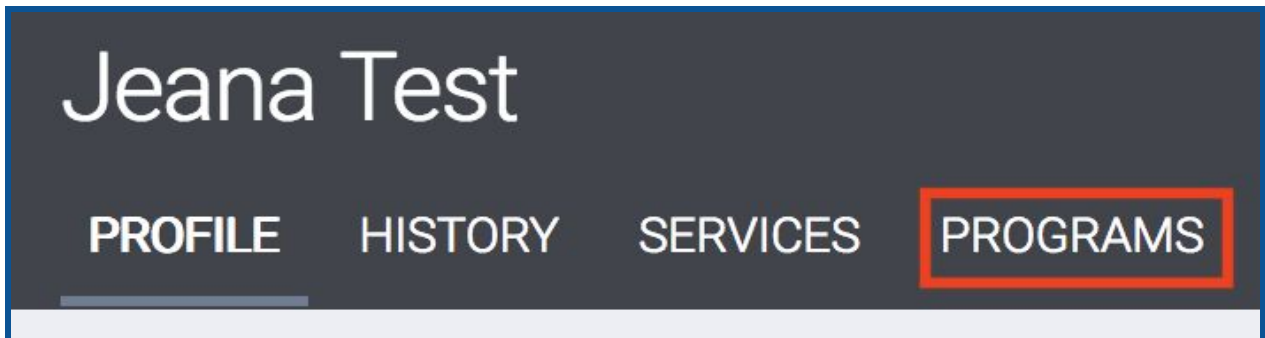
JF Agency San Francisco

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES LOCATION

Your changes have been saved successfully.

Enroll Client in Adult Coordinated Entry Program

8) At the top of the profile screen, select "PROGRAMS".



Jeana Test

PROFILE HISTORY SERVICES **PROGRAMS**

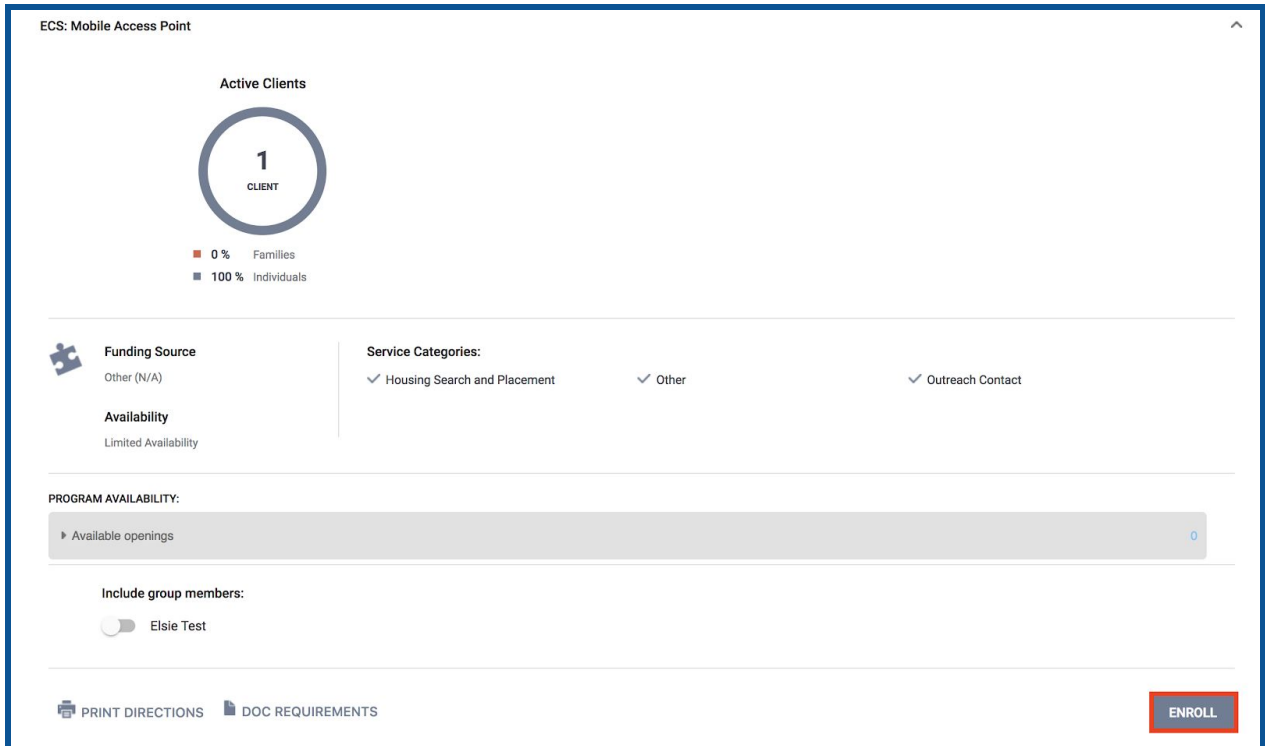
How to Record the Adult CE Primary Assessment

- 9) Click on the down caret next to the Adult Coordinated Entry Access Point program with which you are associated. If you are not sure which program to choose, contact your program manager.



PROGRAMS: AVAILABLE	
ECS Partner – SFHOT	▼
ECS Partner – Swords to Plowshares	▼
ECS Partner – UCSF	▼
ECS: Bayview Access Point	▼
ECS: Mobile Access Point	▼
ECS: SOMA Access Point	▼

- 10) Next, click on the “ENROLL” button to begin the client’s program enrollment.



ECS: Mobile Access Point

Active Clients

1
CLIENT

0 % Families
100 % Individuals

Funding Source
Other (N/A)

Availability
Limited Availability

Service Categories:
✓ Housing Search and Placement ✓ Other ✓ Outreach Contact

PROGRAM AVAILABILITY:
▶ Available openings 0


Include group members:
 Elsie Test

[PRINT DIRECTIONS](#) [DOC REQUIREMENTS](#) **ENROLL**


How to Record the Adult CE Primary Assessment


11) Complete the program enrollment questions and select “SAVE & CLOSE”. The ‘Project Start Date’ is the date that the client visits and engages the Access Point.


Enroll Program for client Jeana Test


Project Start Date 


DISABLING CONDITIONS AND BARRIERS


Disabling Condition 


Physical Disability 


Developmental Disability 

Chronic Health Condition 


HIV - AIDS 

Mental Health Problem 


Substance Abuse Problem 

Domestic Violence Victim/Survivor 


CASH INCOME FOR INDIVIDUAL

Income from Any Source 

NON-CASH BENEFITS

Receiving Non-Cash Benefits 

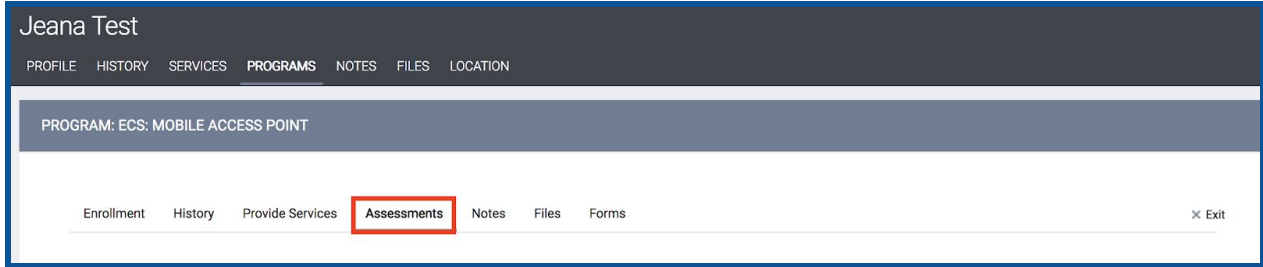
HEALTH INSURANCE

Covered by Health Insurance 

How to Record the Adult CE Primary Assessment

Record the Adult Primary Assessment

12) After enrolling the client in the CE program, click on the program level “Assessments” tab.



13) Select “START” to begin recording the ‘Adult CE Primary Assessment’.

