

QRG – Edit Assessment Date

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WHAT IS A QRG – QRG stands for **Quick Reference Guide**. Quick Reference Guides are short 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 – This guide is useful for Case Managers or System Admins who need to change the date on an assessment. The system defaults the date field to current date which can often be overlooked when entering client information.

HOW TO EDIT THE DATE OF AN ASSESSMENT

Navigation path: *Client Dashboard > HUD Assessments*

Select the assessment you want to edit by clicking the hyperlink.

Assessment Date	Program	Assessment Event	Chronic Homeless	System ID
6/10/2022 12:00:00 AM	MLM - ESG ES Hotel	At Entry	No	417550
10/14/2020 12:00:00 AM	CCNEK - Case Management	At Entry	No	409438

Click the dropdown arrow to the right of the assessment or anywhere on the blue bar.

HUD Universal Data

Assessment * 6/10/2022 - MLM - ESG ES Hotel - At Entry

If client has changed residences since project entry, change the client location (CoC) through a new during program assessment.

Client Location *

Disabling Condition * No

Continuum of Care Code

Living Situation

Type of Residence *

Length of stay in the prior living situation *

Approximate date homelessness started *

(Regardless of where they stayed last night) Number of times the client has been on the streets, in ES, or SH in the past three years including today *

Total number of months homeless on the street, in ES, or SH in the past three years *

Note: A green arrow points to the dropdown arrow on the blue bar at the top of the form.

Click on the pencil icon of the assessment you want to edit.

Assessment * 6/10/2022 - MLM - ESG ES Hotel - At Entry

Date	Program	Type	Edit
6/10/2022	MLM - ESG ES Hotel	At Entry	<input type="button" value="✎"/>
8/27/2021	CCNEK - General Services	At Exit	<input type="button" value="✎"/>
10/14/2020	CCNEK - Case Management	At Entry	<input type="button" value="✎"/>

Note: A green arrow points to the pencil icon in the Edit column for the 6/10/2022 assessment.

Change the Assessment Date then click

Edit Assessment

Program MLM - ESG ES Hotel

Assessment Event At Entry

Assessment Date 06/10/2022

Restriction Shared

Note: A green arrow labeled '1' points to the calendar icon next to the Assessment Date field.

June 2022

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Note: A green arrow labeled '2' points to the Save button.

Click OK on the popup notification saying the date was successfully updated and Save

The screenshot shows the HMIS Case Management interface. At the top, a notification box from 'app.caseworthy.com' states 'Selected Assessment * MLM - ESG ES Hotel * Updated Successfully' with an 'OK' button. A green arrow labeled '1' points to this notification. Below the notification, the 'HUD Universal' assessment details are visible, including a table of assessment history:

Date	Program	Type
6/10/2022	MLM - ESG ES Hotel	At Entry
8/27/2021	CCNEK - General Services	At Exit
10/14/2020	CCNEK - Case Management	At Entry

Below the table, there are several form fields for client information, including 'Client Location', 'Disabling Condition', 'Living Situation', and 'Approximate date homelessness started'. A green arrow labeled '2' points to the 'Save' button at the bottom right of the form.