

Annual Interim Reviews in ServicePoint

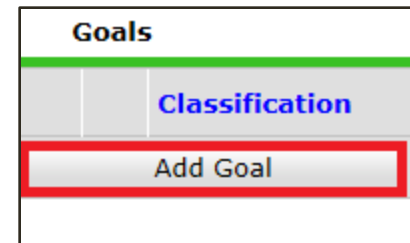


Key Points About the Annual Interim Review

- Annual Interim Reviews are to be completed in the window of 30 days before or 30 days after the annual Entry Date.
- The Annual Interim Review is required for all CoC, SSVF, RHY, and OHCS funded projects.
- The client must have an Annual Interim Review *completed* + or - 30 days to show up correctly in the System Performance Measures required by HUD.

Getting Started

- Select the client that needs the Annual Review Assessment
- Click on the client information tab, then click on the Case Plans tab
- Within that tab, click on Add Goal
- This will generate a large Goal pop-up for you to fill out



Setting the Goal

- For Classification, you will select Assessment
- For Type you will select Annual Assessment
- Target date should be set for 12 months out after Entry Date.
- Overall Status should be In Progress

Goal

Goal - (30) Johnson, Andrew A

Household Members

To include Household members for this Goal, click the box beside each name. Only members from the SAME Household may be selected.

(10) Single Individual

(30) Johnson, Andrew A

Provider * ROCC - Rural Oregon Continuum of Care (OR-505) (3339)

Case Manager -Select-

Date Goal was Set * 05 / 01 / 2017

Classification * -Select-

Type * -Select-

Goal Description

Target Date / /

Overall Status * -Select-

If Closed, Outcome -Select- / /

If Partially Complete, Percent Complete -Select-

Setting the Goal: Continued

- Projected Annual Interim Review Assessment is for 12 months out
- Once you have set the Goal, you will see an Assessment List in your user dashboard
- When a Goal becomes due, click on the Client ID

Projected Follow Up Date: 05 / 02 / 2017

Follow Up User: ROCC - Rural Oregon Continuum of Care (OR-505) (3339)
Jennifer Ross

Follow Up Made: -Select-

Completed Follow Up Date: / /

Outcome at Follow Up: -Select-

Add Goal Cancel

Follow Up List (1)			
Client ID	Type	Date	Time Rem
30	Goal	05/02/2017	1 Day

Completing the Annual Interim Assessment

- Complete the steps below. Once the data is input and saved, the Housing Outcomes Assessment will display.

4th Fill in **Add Interim Review** pop-up box. You are required by HUD to complete a one year Annual Assessment.

To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.

Check the top box for all family members, or just check the box for each family member.

If you only select the children, they will show up as **Individuals** in HUD reporting. This will cause an error in HUD Reporting.

1st Click on the **Entry/Exit** tab.

2nd Click on the **Interim Review** icon

3rd Click on **Add Interim Review** in **Interim Reviews** pop-up box

5th Click **Save & Continue** and then the assessment will display. Update all data elements for each client.

6th Click **Exit**

Interim Review and Follow Ups are set up by your Agency Administrator. I have instructions for setting up **Interim Review** and **Follow Ups**.

If you need help setting up **Interim Review** and **Follow Ups** you can contact me at rena.croucher@orego.gov or 503-986-0978.

This will be a picture of what the client's data looks on the Interim Review day.

However, if there is a change in a client's income or client is exiting you can complete any **Interim Review Type*** of assessment. This eliminates the need to complete the Exit Assessment on the last tab in ServicePoint. However, you can still complete the Exit Assessment on the Assessment tab.

Review Date	Review Type	Client Count
Add Interim Review		
No matches.		

Annual Interim Assessment

- Click Add Interim Review
- For Interim Review Type you must select “Annual Assessment”
- Review Date should be **+ or - 30 days** from Entry Date
- Once all information is input, click Save & Continue

Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
No matches.		

Add Interim Review

Exit

Add Interim Review - (30) Johnson, Andrew A

Interim Review Data

Entry / Exit Provider: MWVCAA - MC - ARCHES - Coordinated Assessment (5791) [ROCC] (5791)

Entry / Exit Type: HUD

Interim Review Type*: Annual Assessment

Review Date*: 06 / 21 / 2017 3 : 43 : 36 PM

Make sure Review Date* is + or - 30 days from Entry Date.

Save & Continue Cancel

- Enter the data into the assessment and click Save & Exit.

Assessment Updates (Formerly known as the RARE) Interim Review Date: 06/21/2017 03:55:11 PM

Income from Any Source:

Monthly Income HUD Verification

Start Date*	Source of Income	Receiving Income Source?	Monthly Amount	End Date
<input type="button" value="Add"/> <input type="button" value="View Gross Income"/>				

Total Monthly Income:

Non-cash benefit from any source:

Non-Cash Benefits HUD Verification

Start Date*	Source of Non-Cash Benefit	Receiving Benefit?	Amount of Non-Cash Benefit	End Date
<input type="button" value="Add"/>				

Covered by Health Insurance:

Health Insurance HUD Verification

Start Date*	Health Insurance Type	Covered?	End Date
<input type="button" value="Add"/>			

Does the client have a disabling condition?

Disabilities HUD Verification

	Disability Type	Start Date*	Disability determination	End Date
	Chronic Health Condition (HUD)	06/07/2017	No (HUD)	
	Physical (HUD)	06/07/2017	No (HUD)	
	Mental Health Problem (HUD)	06/07/2017	No (HUD)	
	HIV/AIDS (HUD)	06/07/2017	No (HUD)	
	Developmental (HUD)	06/07/2017	No (HUD)	
<input type="button" value="Add"/> Showing 1-5 of 8 <input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/>				

Relationship to Head of Household:

Residential Move-in Date: / /

Client's Residence / Last Permanent Address

Placement Date *	Client's Street Address	Apt. #	Client's ZIP	Housing Type
<input type="button" value="Add"/>				

Update when required by funder or administrator

Household Income (Monthly):

Percent of Median Family Income:

Level of Family Income (% HHS Guidelines):

Is the client eligible for benefits?:

Has the client applied for benefits?:

Final Steps

- Return to your Home Module; click on the Goal for the client that you just assessed
- Fill out the info about the Annual Interim Review Assessment that you just completed
- Click Save & Exit
- The Goal will no longer appear in your Follow Up List

Client ID	Type	Date	Time Remaining
30	Goal	05/02/2017	1 Day

Follow Up User	ROCC - Rural Oregon Continuum of Care (OR-505) (3339)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>		
	Jennifer Ross					
Follow Up Made	-Select-					
Completed Follow Up Date	<input type="text"/> /	<input type="text"/> /	<input type="text"/>	<input type="button" value="↺"/>	<input type="button" value="↻"/>	<input type="button" value="↻"/>
Outcome at Follow Up	-Select-					
				<input type="button" value="Add Goal"/>	<input type="button" value="Cancel"/>	