Annual Interim Reviews in ServicePoint

Oregon State of Oregon
Housing and Community Services
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.
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
Completing the Annual Interim Assessment

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

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@oregop.gov or 503-986-0978.
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
• Enter the data into the assessment and click Save & Exit.
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