

ServicePoint Updating Data/Interim Assessments

Interim Assessments are completed in order to track change over time. Anytime there is a change with a client, complete an interim assessment.

To start an Interim Assessment, go to the Entry/Exit tab:

The screenshot shows the 'Client Information' section with the 'Entry / Exit' tab selected. A table lists an entry for 'Example Provider (6380)' with type 'HUD' and project start date '04/10/2018'. The 'Interims' column has a paper icon. A yellow arrow points to this icon.

| Program | Type | Project Start Date | Exit Date | Interims | Follow Ups | Client Count |
|-------------------------|------|--------------------|-----------|----------|------------|--------------|
| Example Provider (6380) | HUD | 04/10/2018 | | | | |

1. Click on Entry/Exit tab.
2. Click on the paper icon beneath "Interims".
3. Click "Add Interim Review".

The screenshot shows the 'Client Information' section with the 'Entry / Exit' tab selected. A red '1' is above the tab, and a red '2' is above the 'Interims' column header. The table shows the same entry as the previous screenshot. An 'Add Entry / Exit' button is visible at the bottom left.

| Program | Type | Project Start Date | Exit Date | Interims | Follow Ups | Client Count |
|-------------------------|------|--------------------|-----------|----------|------------|--------------|
| Example Provider (6380) | HUD | 04/10/2018 | | | | |

Then...

The screenshot shows the 'Interim Reviews' dialog box. A red '3' is to the left of the dialog. The dialog title is 'Interim Reviews'. Below the title is a section 'Interim Reviews Associated with this Entry / Exit'. A table with columns 'Review Date', 'Review Type', and 'Client Count' is shown. The table is empty, and the text 'No matches.' is displayed. An 'Add Interim Review' button is at the bottom left.

| Review Date | Review Type | Client Count |
|-------------|-------------|--------------|
| No matches. | | |

Adding Interim Review Steps

1. Include the appropriate HH members
2. Interim Review Type
3. Review Date: Date changes take place/review takes place
4. Save & Continue

Add Interim Review - (566) Sky, Blue

Household Members

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

(336) Male Single Parent

1 (566) Sky, Blue (Entry Date: 04/10/2018 1:19 PM)

(573) Sky, Rainbow (Entry Date: 04/10/2018 1:19 PM)

Interim Review Data

Entry / Exit Provider: Example Provider (6380)

Entry / Exit Type: HUD

2 Interim Review Type*: Update

3 Review Date*: 04 / 12 / 2018 12 : 21 : 09 PM

4 Save & Continue Cancel

Updating HUD Verification

1. Update the Yes/No question
2. Click on the magnifying glass

1 Income from Any Source: No (HUD)

2 Monthly Income HUD Verification

| | Start Date * | Source of Income | Receiving Income Source? | Monthly Amount | End Date |
|--|--------------|---|--------------------------|----------------|----------|
| | 04/01/2018 | SSDI (HUD) | No | | |
| | 04/01/2018 | Private Disability Insurance (HUD) | No | | |
| | 04/01/2018 | Retirement Income From Social Security (HUD) | No | | |
| | 04/01/2018 | Worker's Compensation (HUD) | No | | |
| | 04/01/2018 | VA Non-Service Connected Disability Pension (HUD) | No | | |

Add View Gross Income Showing 1-5 of 15 First Previous Next Last

- Sort rows by clicking column headers
- Click pencil to edit

Show All Monthly Income Records

| Monthly Income | | | | | | | |
|----------------|----------------------------------|-----------------------|------------|--|--------------------------|----------------|----------|
| | Provider | Date Effective | Start Date | Source of Income | Receiving Income Source? | Monthly Amount | End Date |
| | Central Oregon - (OR-503) (3590) | 04/01/2018 1:19:14 PM | 04/01/2018 | Alimony or Other Spousal Support (HUD) | No | | |
| | Central Oregon - (OR-503) (3590) | 04/01/2018 1:19:14 PM | 04/01/2018 | Child Support (HUD) | No | | |
| 4 | Central Oregon - (OR-503) (3590) | 04/01/2018 1:19:14 PM | 04/01/2018 | Earned Income (HUD) | No | | |
| | Central Oregon - (OR-503) (3590) | 04/01/2018 1:19:14 PM | 04/01/2018 | General Assistance (HUD) | No | | |
| | Central Oregon - (OR-503) (3590) | 04/01/2018 1:19:14 PM | 04/01/2018 | Other (HUD) | No | | |

5. Add end date and Save

Edit Recordset - (566) Sky, Blue

Monthly Income

Start Date: 04/01/2018

Source of Income: Earned Income (HUD)

If Other, Please Specify: [Text Area]

Receiving Income Source?: No

If other, specify: [Text Field]

Monthly Amount: [Text Field]

End Date: [Date Picker]

Action for Prosperity II and AFP-FUP ONLY!!

Progress and Follow-Up Interval: -Select-

Follow-Up Status: -Select-

Buttons: Print Recordset, Save, Cancel

6. Scroll Down and hit Add to add a new line of data

| | | | | | |
|--|----------------------------------|-----------------------|------------|---|----|
| | Central Oregon - (OR-503) (3590) | 04/01/2018 1:19:14 PM | 04/01/2018 | Child Support (HUD) | No |
| | Central Oregon - (OR-503) (3590) | 04/01/2018 1:19:14 PM | 04/01/2018 | Pension or retirement income from another job (HUD) | No |

Add 6 Showing 1-17 of 17

7. Complete the Start Date. If updating Income, complete the Source of Income and Monthly Amount.
8. Save Assessment.

Add Recordset - (566) Sky, Blue

Monthly Income

Start Date * 04 / 12 / 2018 **7**

Source of Income Earned Income (HUD)

If Other, Please Specify

Receiving Income Source? -Select-

If other, specify

Monthly Amount 500 **8**

End Date

Action for Prosperity II and AFP-FUP ONLY!!

Progress and Follow-Up Interval -Select-

Follow-Up Status -Select-

Save Save and Add Another Cancel