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:

1. Click on Entry/Exit tab.

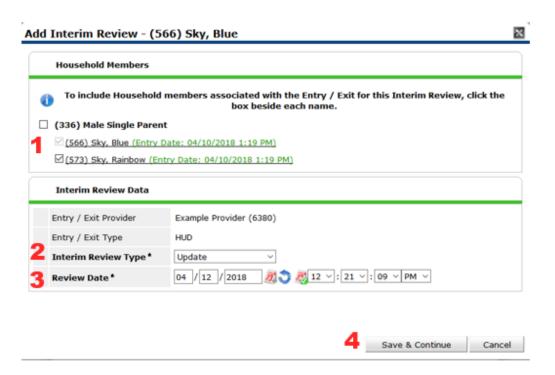2. Click on the paper icon beneath "Interims".
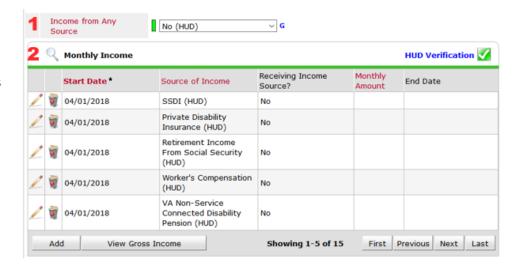
3. Click "Add Interim Review".

Then...

Adding Interim Review Steps

1. Include the appropriate HH members

2. Interim Review Type

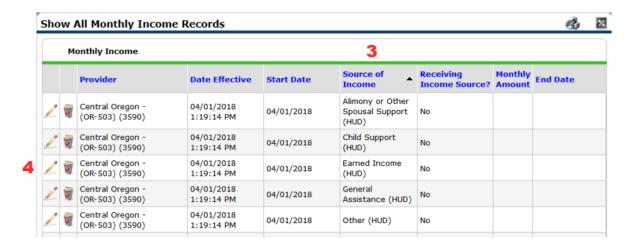3. Review Date: Date changes take place/review takes place

4. Save & Continue

Updating HUD Verification

1. Update the Yes/No question

2. Click on the magnifying glass

3. Sort rows by clicking column headers

4. Click pencil to edit

5. Add end date and Save

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

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

8. Save Assessment.