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## SERVICEPOINT® INTERIM AND FOLLOW UP REVIEWS

*What is an Interim or Follow Up Review and when should this feature be incorporated into a user's workflow?* The Interim and Follow Up Review functionality were introduced in ServicePoint 5.7.0 and allow a user to periodically assess a client following an entry into a project or after exit. Each client may have any number of Updates associated with a given Entry/Exit record but only a single Annual Assessment record (select Annual Assessment from the Interim Review Type picklist) for each 365 day period of enrollment. Other types of Interim reviews may be added using the customizable picklist (Review Type) available in Picklist Admin. A Follow Up can be conducted as often as desired any time after a client exits a project.

Use of the Entry/Exit Interim Follow Up Reviews creates point-in-time data linked to an Entry/Exit record which allows for reporting on a client's state as it changes over time. Assessment questions that are answered on an Interim or Follow Up Review will have a Date Effective of the date that is selected when creating the review.

The 2014 HMIS Data Dictionary requires Updates and Annual Assessments for HUD and Federal Partner Programs. These Updates and Annual Assessments are created by using the Interim Review portion of the Interim and Follow Up Review functionality – and **this workflow is required for all HUD and Federal Partner programs that require periodic Updates or Annual Client Assessments**. Updates are conducted on a periodic basis as defined by HUD or the Federal Partners. Annual Assessments are conducted no more than 30 days before or after the client's "Anniversary Date" which is the Entry/Exit Entry Date. *Please note that use of this functionality is not limited to HUD and Federal Partner programs, but may be beneficial to all projects tracking data in the HMIS.*

To use Entry/Exit Interim Reviews and Follow-Ups, the system preference "Use Entry/Exit Interim and Follow Up Reviews" must be turned on. Once the system preference is enabled, the same setting will need to be turned on for each Provider that will use Entry/Exit Interim and Follow up Reviews. Once this setting is turned on for a Provider, new rows will appear in the 'Assessment Display Settings' tab in Provider Admin that will allow the administrator to select which Assessments will display for each type of Interim or Follow Up Review.

For more information on turning on this setting and assigning different Assessments to Interims and Follow Ups, including screen images, see the 'SP 5.7 Release Notes' on [CollaboranGo](#) (located in Documents & Downloads > ServicePoint > Upgrades and Updates > 5.x > Major Versions).

## INTERIM REVIEWS AND FOLLOW-UPS WORKFLOW

In order to see the Interims icon a user must first navigate to the Entry/Exit Tab, create an Entry/Exit and save the Entry, at which point the Interims icon will become visible.

### Step 1: Identify the relevant Entry/Exit for your project and click on the “Interims” icon.

After navigating to the Entry/Exit tab the user will click on the “Interims” icon for the desired Entry/Exit (Figure 1).

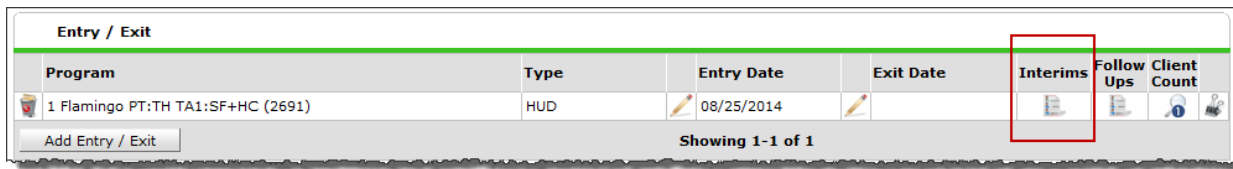


Figure 1

Once the user clicks on the Interims icon a pop-up will appear allowing the user to “Add Interim Review” (Figure 2). Click on “Add Interim Review” and proceed to Step 2.

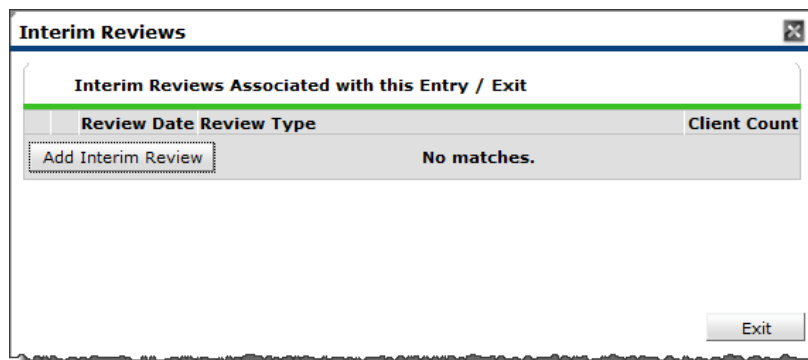
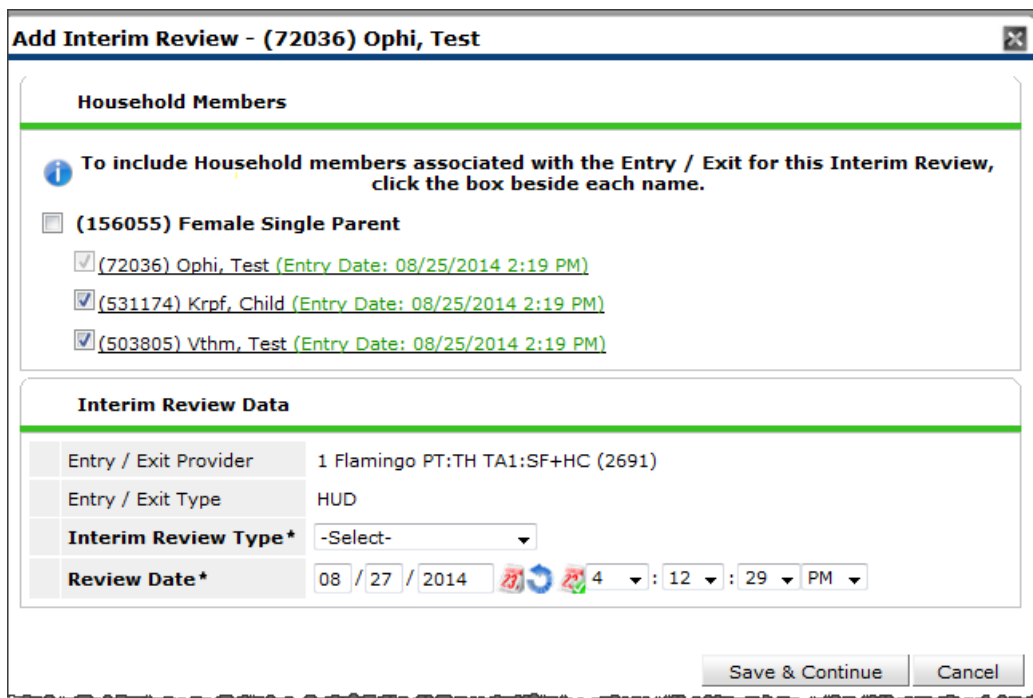


Figure 2

## Step 2: Enter the required data on the Interim Review Data Screen.

Clicking on “Add Interim Review” will take the user to the Interim Review Data Screen. The user will see the Household Members, Entry/Exit Provider and Entry/Exit Type as selected when the initial Entry/Exit was created.

From this screen the user can uncheck household members who do not require an update at this time. The user should then select the desired Interim Review Type (Update and Annual Assessment are hard-coded values used by HUD and other Federal Partners) and enter the desired Review Date (Figure 3). Once the data are filled in, click “Save and Continue” to move to the next step.



Household Members	
To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.	
<input type="checkbox"/>	(156055) Female Single Parent
<input checked="" type="checkbox"/>	(72036) Ophi, Test (Entry Date: 08/25/2014 2:19 PM)
<input checked="" type="checkbox"/>	(531174) Krf, Child (Entry Date: 08/25/2014 2:19 PM)
<input checked="" type="checkbox"/>	(503805) Vthm, Test (Entry Date: 08/25/2014 2:19 PM)

Interim Review Data	
Entry / Exit Provider	1 Flamingo PT:TH TA1:SF+HC (2691)
Entry / Exit Type	HUD
Interim Review Type*	-Select-
Review Date*	08 / 27 / 2014 4 : 12 : 29 PM

Save & Continue    Cancel

Figure 3

### Step 3: Enter the desired changes/updates on the Interim Review Assessment.

Clicking on “Save and Continue” from the previous screen brings up the Interim Review Assessment (Figure 4). At this point, the user should review the questions on the assessment and follow one of two options:

- If there is no change in the data on the Interim Review Assessment the user can navigate to the bottom of the assessment and click “Save and Exit”.
- If there are updates needed for the various assessment items the user can make the appropriate changes and then navigate to the bottom of the assessment and click “Save and Exit”.

Figure 4

### Step 4: Review of the Entry/Exit will show an additional Interim Review in the Interims column.

Once the Interim Review Assessment is saved, the number displaying in the Interims column will increase by 1 (Figure 5).

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
1 Flamingo PT:TH TA1:SF+HC (2691)	HUD	08/25/2014		1		

Figure 5

**Step 5 (Optional): Once an Interim Review is created it can be edited if necessary.**

Once the Interim Review is created it can be edited as necessary by clicking on the Interims icon. This will bring up the associated Interim Reviews. To make additional edits to the Interim Review click the pencil next to the desired review to navigate to either the Interim Review Data Screen or the Interim Review Assessment, make the needed changes and click “Save and Exit”. The Interim Review can also be deleted if created in error by clicking on the Trash Can next to the desired review to delete it from the system (Figure 6).

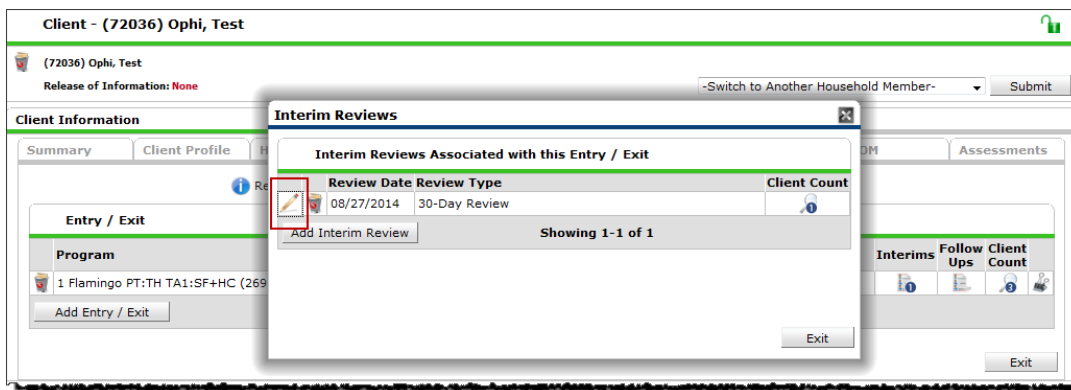


Figure 6

**Step 6 (Optional): Once an Entry/Exit has an Exit Date a Follow Up Review can be created following the same steps as above by clicking on the Follow Up icon.**

Follow Up Reviews are not currently required by HUD or any of the Federal Partners but are a useful tool to track a client’s progress once exiting a project (Figure 7)

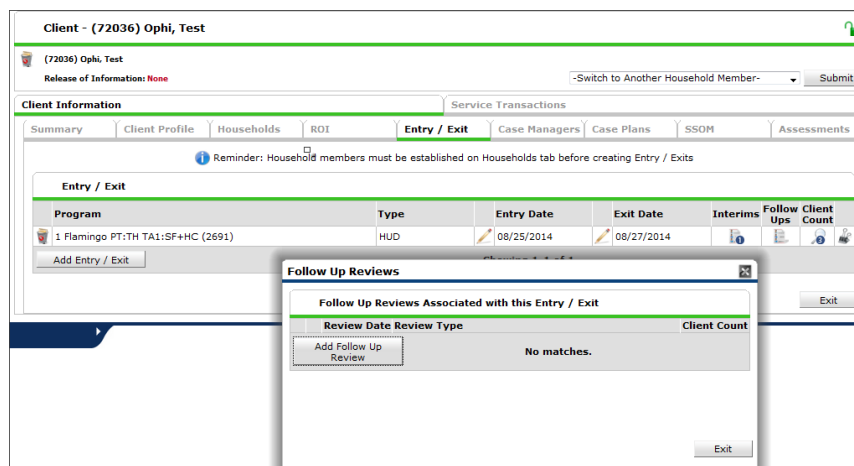


Figure 7

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## Frequently Asked Questions:

- 1) Does the user have to be in Backdate Mode to create the Interim or Follow Up Review?
  - a. *No, but the user may choose to be in Backdate Mode if desired. The Interim Review will update data on the date selected when the review is created.*
  
- 2) What project types can use Interim and Follow Up Reviews?
  - a. *Any project that uses the Entry/Exit function in ServicePoint may use Interim and Follow Up Reviews*
  
- 3) What if a project never serves clients for more than one consecutive year?
  - a. *The Interim Reviews are still be used to document any changes to program specific data elements that happen while enrolled in the project, even if less than a year.*
  
- 4) Is income documented in children's records?
  - a. *Income for persons under 18, who are part of a household containing an adult, is recorded under the head of household.*
  - b. *If there are no adult members of the household, income is documented for the member marked as head of household.*
  
- 5) How do you handle income that may fluctuate significantly from month to month, like a child support order that is based on a percentage of income?
  - a. *Enter an average amount based on a significant period of time (eg six months)*
  - b. *End Date each month's previous amount and add a new income row with updated amount each month*
  
- 6) What if there are two adults in a household, how are their Interim Reviews handled?
  - a. *Incomes are unique to an individual. In this instance, an Interim Review is created individually for the household members as their incomes change.*
  
- 7) How is security applied for Interim and Follow Up Reviews?
  - a. *Security of Interim and Follow Up Reviews follow the security of Entry/Exit to which it is attached.*

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