

# THE COALITION OF HOMELESS SERVICES PROVIDERS

## Adding an Interim Review

In our example, we will update our client's (Tim) income from \$60 to \$120 from unemployment during his 120 day review.

### To add an Interim Review

1. Log into ServicePoint and search for the client.
2. From the Client Information screen, click the **Entry/Exit** tab.
3. Click the **Interims** icon (see Figure 1).

Client - (132) Interim, Tim

(132) Interim, Tim  
Release of Information: Ends 08/12/2025

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Measurements | Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
HHI: Permanent Housing IV (37)	HUD	08/12/2013		2	0	

Add Entry / Exit | Showing 1-1 of 1 | Exit

*Notice that the Interims and Follow Ups columns also display the number of existing interim and Follow up Reviews. Figure 1 shows two Interims and no Follow up Reviews.*

4. A popup window lists any existing reviews. Right now, Tim has already been reviewed at 30 and 60 days.

Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
10/13/2013	60-Day Review	
09/12/2013	30-Day Review	

Add Interim Review | Showing 1-2 of 2

5. Click the **Add Interim Review** button to add an Annual Review to reflect a change to Tim's income.

**Add Interim Review - (132) Interim, Tim**

Interim Review Data	
Entry / Exit Provider	HHI: Permanent Housing IV (37)
Entry / Exit Type	HUD
Interim Review Type *	Annual Review
Review Date *	08 / 08 / 2014 3:44:05 PM

6. Click the **Save & Continue** button to display the Interim Review Assessment screen.

**Entry / Exit Interim Review**

Interim Review Data	
Entry / Exit Provider	HHI: Permanent Housing IV (37)
Entry / Exit Type	HUD
Interim Review Type	120-Day Review
Review Date	08/13/2014 09:09:40 AM

**Interim Review Assessment**

Household Members	Annual Update												
<input checked="" type="checkbox"/> (132) Interim, Tim Age: 27	Interim Review Date: 08/13/2014 09:09:40 AM												
	Income received from any source in past 30 days? <input type="checkbox"/> Yes (HUD)												
	<b>Monthly Income (Cash)</b> <table border="1"> <thead> <tr> <th>Last 30 Day Income</th> <th>Source of Income</th> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>US\$60.00</td> <td>Unemployment Insurance (HUD)</td> <td>10/13/2013</td> <td>12/12/2013</td> </tr> <tr> <td>US\$30.00</td> <td>Unemployment Insurance (HUD)</td> <td>09/12/2013</td> <td>11/12/2013</td> </tr> </tbody> </table> Add View Gross Income Showing 1-2 of 2	Last 30 Day Income	Source of Income	Start Date	End Date	US\$60.00	Unemployment Insurance (HUD)	10/13/2013	12/12/2013	US\$30.00	Unemployment Insurance (HUD)	09/12/2013	11/12/2013
Last 30 Day Income	Source of Income	Start Date	End Date										
US\$60.00	Unemployment Insurance (HUD)	10/13/2013	12/12/2013										
US\$30.00	Unemployment Insurance (HUD)	09/12/2013	11/12/2013										
	Non-cash benefit received in past 30 days? <input type="checkbox"/> Yes (HUD)												
	<b>Non-Cash Benefits</b>												

7. Since Tim's income changed for this review, click the **pencil** to the left of the previous income (\$60) and enter an end date. (End date should be one day prior to the start date of the new income)

8. Click the **Add** button to enter his new income of \$120, source of income (unemployment), and Start Date.

**Add Recordset - (132) Interim, Tim**

Monthly Income (Cash)	
Last 30 Day Income	120 G
Source of Income	Unemployment Insurance (HUD) G
If Other, Please Specify	
Receiving Income Source?	Yes G
Start Date	12 / 13 / 2013 G
End Date	/ / G
<input type="button" value="Save"/> <input type="button" value="Save and Add Another"/> <input type="button" value="Cancel"/>	

9. Click the **Save** button. Tim's new income displays as \$120.

**Entry / Exit Interim Review**

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**Interim Review Data**

Entry / Exit Provider	HHI: Permanent Housing IV (37)
Entry / Exit Type	HUD
Interim Review Type	120-Day Review
Review Date	08/13/2014 09:09:40 AM

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**Interim Review Assessment**

**Household Members**

- (132) Interim, Tim  
Age: 27

**Annual Update** Interim Review Date: 08/13/2014 09:09:40 AM

Income received from any source in past 30 days?  Yes (HUD)  No G

**Monthly Income (Cash)**

Last 30 Day Income	Source of Income	Start Date	End Date
US\$120.00	Unemployment Insurance (HUD)	12/13/2013	
US\$60.00	Unemployment Insurance (HUD)	10/13/2013	12/12/2013
US\$30.00	Unemployment Insurance (HUD)	09/12/2013	11/12/2013

Add    View Gross Income    Showing 1-3 of 3

Non-cash benefit received in past 30 days?  Yes (HUD)  No G

10. Click the **Save & Exit** button.

11. The 4 Interim Reviews associated with Tim display.

**Interim Reviews**

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**Interim Reviews Associated with this Entry / Exit**

Review Date	Review Type	Client Count
08/13/2014	120-Day Review	1
08/01/2014	Annual Review	1
10/13/2013	60-Day Review	1
09/12/2013	30-Day Review	1

Add Interim Review    Showing 1-4 of 4

Exit

12. Click the **Exit** button.

Client - (132) Interim, Tim

(132) Interim, Tim  
Release of Information: Ends 08/12/2025

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Measurements | Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
HHI: Permanent Housing IV (37)	HUD	08/12/2013		1	1	1

Add Entry / Exit | Showing 1-1 of 1

Exit

13. Now 3 Interim Reviews display under the Interims column on the Client Information screen.

12. Click the **Exit** button.

## Adding a Follow-up Review

The steps to create a Follow up Review are similar to the Interim Review.

1. Click the **Follow ups** icon on the screen.

Client - (132) Interim, Tim

(132) Interim, Tim  
Release of Information: Ends 08/12/2025

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Measurements | Assessments

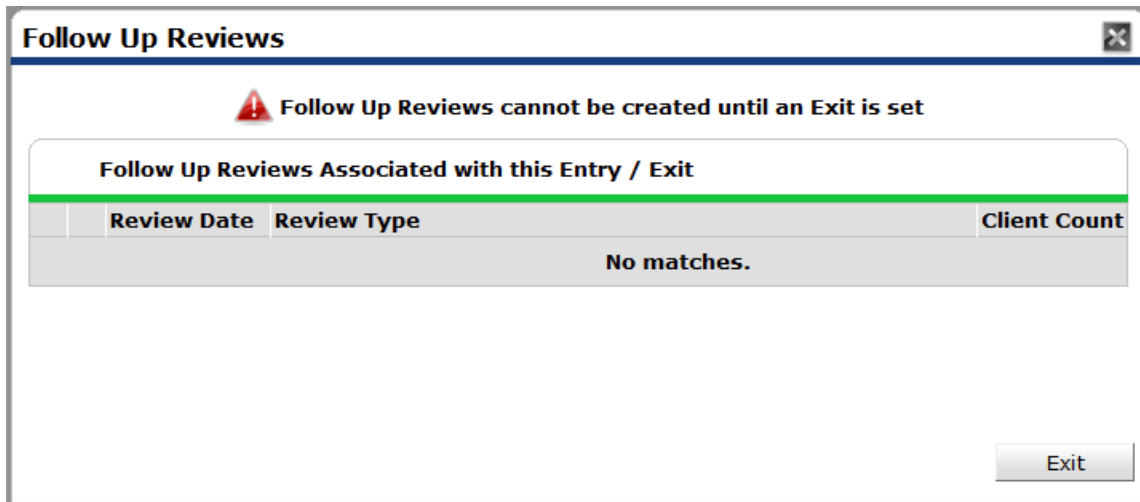
Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
HHI: Permanent Housing IV (37)	HUD	08/12/2013		2	1	1

Add Entry / Exit | Showing 1-1 of 1

Exit

*Since Follow up Reviews can only be done after a client has exited your Project, the following screen displays if the client has not been exited.*



2. After you have exited the client, continue to enter the Follow up Review Date and Type as shown in section “Adding an Interim Review”.

## Adding an Interim or Follow up Review for a Household

To add an Interim or Follow up Review for a family:

14. Follow the usual steps to enter a household.

15. The only difference between entering a single client and a family is that you need to check the box to the left of the household members to include in the review, select the Interim Review Type or the Follow Up Review Type, and enter the Review Date.

- For an **Interim Review**, all household members who were included in the Entry/Exit record may be included in the review.


NOTE: Remember that an Interim Review must be dated after the Entry date and before the Exit date.

- For a **Follow up Review**, only those household members who were included in the Entry/Exit and also have an exit date may be included in the review.

NOTE: Remember that a Follow up Review must be dated after the Exit date.






**Household Members**

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

(10) Other

- (80964) Adamas, John (Entry Date: 03/29/2012 3:06 PM)
- (80965) Banks, James (Entry Date: 03/29/2012 3:06 PM)
- (80978) Banks, Jeanne (Entry Date: 03/29/2012 3:06 PM)

**Interim Review Data**

Entry / Exit Provider	Bowman Systems, LLC (0)
Entry / Exit Type	Standard
Interim Review Type *	-Select-
Review Date *	05 / 29 / 2012    3 : 10 : 16 PM

Save & Continue    Cancel