

Interim (Update) and Interim (Annual Assessment) Creation Procedures

What are Interims (Updates)?

An Interim (Update) is a method of changing client information while retaining the historical data. Data at entry and exit have effective dates. Interims (Updates) are important because they create changed records with different effective dates, creating a continuum of data values that accurately reflect clients' situations. Interims are used to calculate changes in income, non-cash benefits, health insurance and disabilities. Specifically, certain programs use interims to calculate eligibility for a program in reporting to the Federal Partners.

To create an Interim (Update):

1. Login to ServicePoint
2. Search for and locate the client record
3. Click on (go to) the **Entry/Exit** tab
4. Find the Entry for which the interim should be added
5. On the right side, find the **Interims** column and click the *checklist icon* (figure 1):

FIGURE 1: INTERIM COLUMN & CHECKLIST ICON

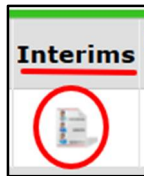


FIGURE 1: INTERIM COLUMN & CHECKLIST ICON

6. Click the **Add Interim Review** button (figure 2):

FIGURE 2: ADD INTERIM REVIEW BUTTON

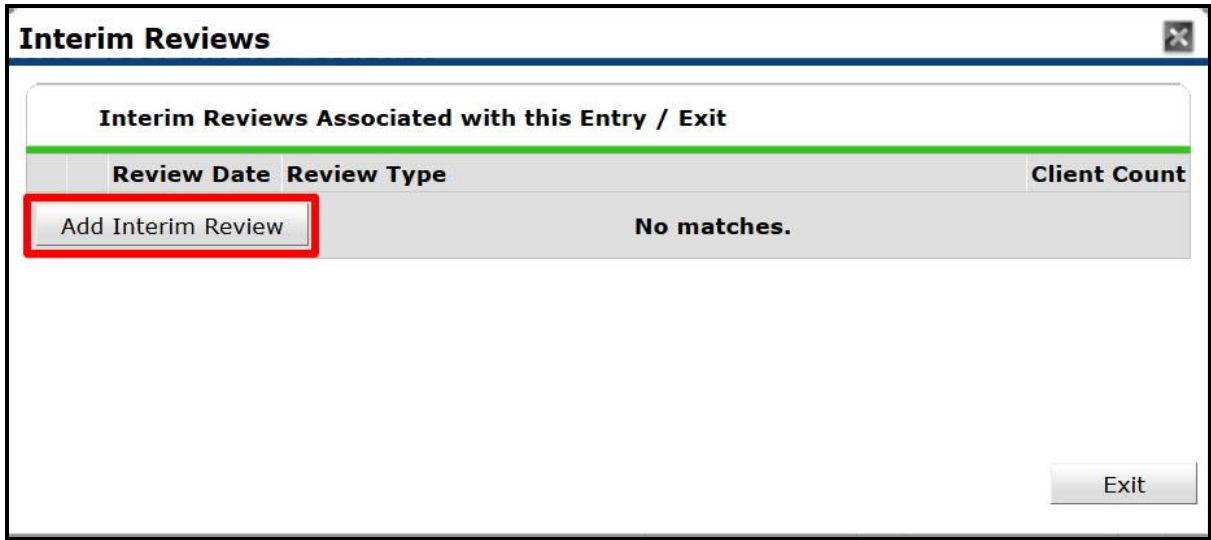


FIGURE 2: ADD INTERIM REVIEW BUTTON

7. In the **Add Interim Review** screen (figure 3):
 - a. Select **Interim Review Type** of *Update*
 - b. For **Review Date**, choose the date that any changes to be made took effect; e.g., if the client received a raise in earned income on June 15th, 2017, enter that as the **Review Date**
 - c. Click the **Save & Continue** button

FIGURE 3: THE ADD INTERIM REVIEW SCREEN FOR INTERIM (UPDATES)

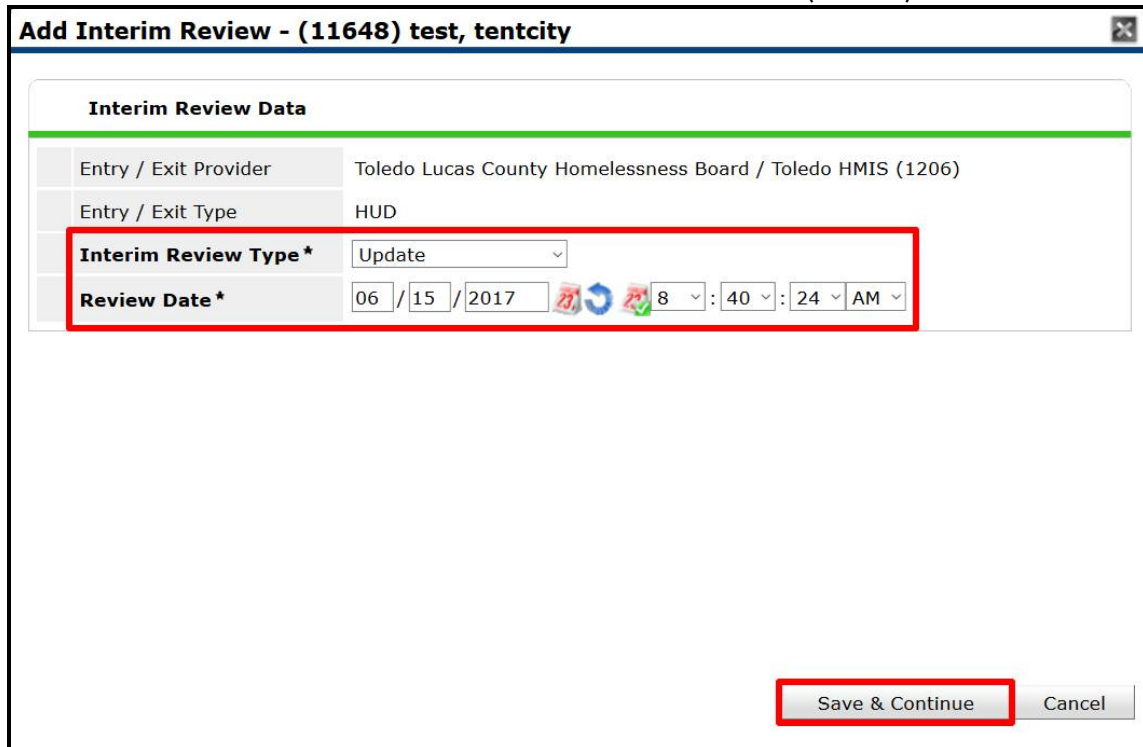


FIGURE 3: THE ADD INTERIM REVIEW SCREEN FOR INTERIM (UPDATES)

8. In the **Interim Review Data** screen
 - a. Complete any data changes as required; use the general procedures for updating sub-assessment information (end the old record; create a new record).
 - b. Click the **Save & Continue** button
 - i. You will see the new interim (figure 4)
 - c. Click the **Exit** button to exit the **Interim Reviews** screen

FIGURE 4: INTERIM REVIEWS SCREEN WITH NEW INTERIM REVIEW ADDED

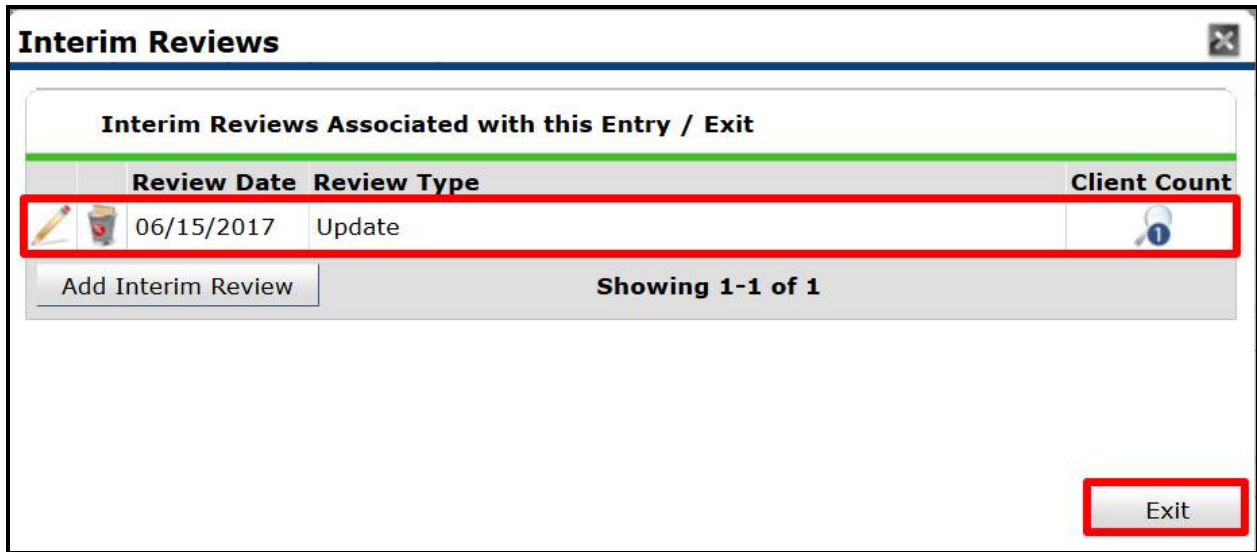


FIGURE 4: INTERIM REVIEWS SCREEN WITH NEW INTERIM REVIEW ADDED

What are Interim (Annual Assessments)?

An Interim (Annual Assessment) is an interim that falls within ± 30 days of a client's anniversary date (i.e., the Entry (Start) Date). If a client stays in any project for 365+ days, they must have an Interim (Annual Assessment). Changes to be made can be made during an Interim (Annual Assessment; however, even if no changes to client data are necessary, an Interim (Annual Assessment) must be completed. Interim (Annual Assessments) are used for reporting to HUD in APRs, in the new Data Quality Framework Reports, and whose completion rate affects our Continuum of Care's scoring during application processes.

To create an Interim (Annual Assessment):

1. Login to ServicePoint
2. Search for and locate the client record
3. Click on (go to) the **Entry/Exit** tab
4. Find the Entry for which the interim should be added

5. On the right side, find the **Interims** column and click the *checklist icon* (figure 1).
6. Click the **Add Interim Review** button (figure 2).
7. In the **Add Interim Review** screen (figure 5)
 - a. Select **Interim Review Type** of *Annual Assessment*
 - b. For **Review Date**, choose a date that is ± 30 day of the nearest anniversary date; e.g., If the client entered your project on June 15th, 2016, the anniversary date would be June 15th, 2017 and ± 30 would be from May 16th, 2017 through July 15th, 2017. You should choose a **Review Date** from that range.
 - i. If you report APRs to funding agencies, the **Review Date** can affect whether the annual assessment posts to an APR. The **0260 - HUD CoC APR Data Quality/Completeness Report** can be run for the APR date range to see if any Annual Assessments are missing or affected by **Review Date**.
 - c. Click the **Save & Continue** button

FIGURE 5: THE ADD INTERIM REVIEW SCREEN FOR ANNUAL ASSESSMENTS

Edit Interim Review Data

Interim Review Data

Entry / Exit Provider	Toledo Lucas County Homelessness Board / Toledo HMIS (1206)
Entry / Exit Type	HUD
Interim Review Type *	Annual Assessment ▾
Review Date *	06 / 15 / 2017 8 : 32 : 56 AM

FIGURE 5: THE ADD INTERIM REVIEW SCREEN FOR ANNUAL ASSESSMENTS

8. In the **Interim Review Data** screen
 - a. Complete any data changes as required; use the general procedures for updating sub-assessment information (end the old record; create a new record).

- i. Note: Annuals are mandatory for all clients staying over 365 days in a project—even if no changes have occurred. If no changes have occurred, proceed to 8(b).
- b. Click the **Save & Continue** button
 - i. You will see the new interim (*figure 4*)
- c. Click the **Exit** button to exit the **Interim Reviews** screen