1.0 Overview

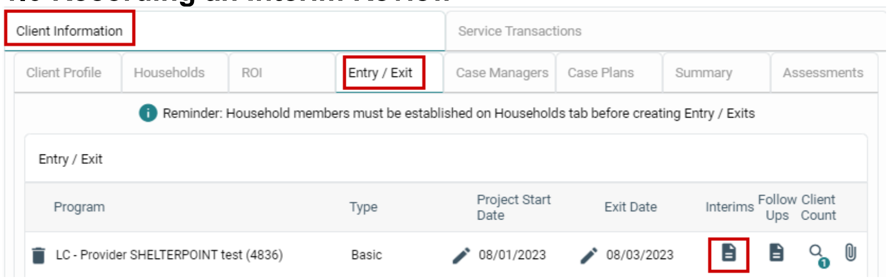
Interim Reviews are used to record **information that has changed** since the entry assessment. In most cases, an Interim occurs when a client hits a certain milestone: engaging with Outreach services, move into housing, in your program for a year, or their situation significantly changes (monthly income, health, benefits, or health insurance). Some programs will complete an Interim at the same time they complete a Program Entry to indicate a client is housed when services begin.

2.0 Work Instructions

1.0 Interim Review Basics

a. Navigate to the Head of Household's client file.
b. Click on the Entry/Exit tab
c. Under the "Interims" column, select the page icon for your project entry.

1.0 Recording an Interim Review



1.1 Add Interim Review

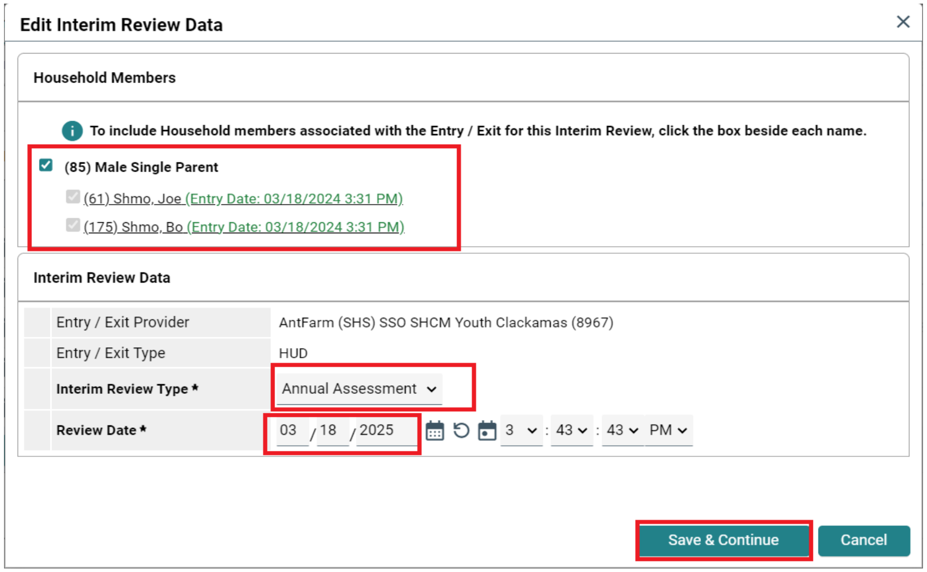
a. Select the page icon.
b. From pop-up window,
    a. Select
        i. "Add Interim Review."

1.1 Add Interim Review

1.2 Interim Review Data

a. All **Household Members** check boxes must be selected indicated with a check.
b. Select appropriate **Interim Review Type**.
    a. If completing an Annual,
        i. Select Annual Assessment.
        ii. Otherwise, select Update.
        iii. Input appropriate **Review Date**.
c. Select "Save & Continue."

1.2 Interim Review Data



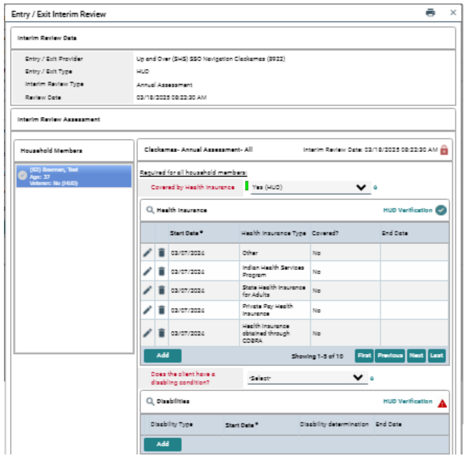
1.3 Review all Assessment Questions

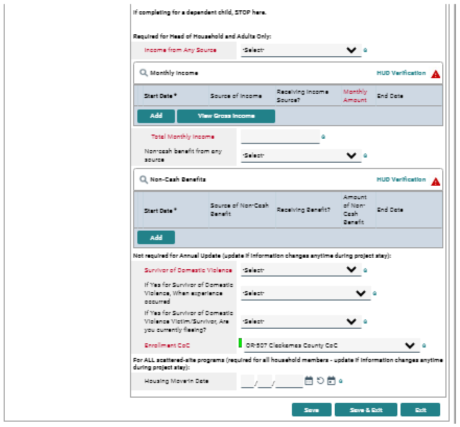
a. From pop-up window
    a. Click Save & Continue

You will see several questions, including **Housing Move-in Date** and all four **HUD Verification** tables: Health Insurance, Disabilities, Monthly Income, and Non-Cash Benefits.

b. Review all Assessment Questions for all household members are accurate and update any outdated information.
b. After review, select "Save & Exit."

1.3 Review all Assessment Questions





1.4 Update HUD Verification Tables

a. HUD Verification tables are four items:
   i. Health Insurance,
   j. Disabilities (AKA Health Conditions),
   k. Monthly Income, and
   l. Non-Cash Benefits.

b. Verifications are completed during program entry as part of client intake into a program.

c. Unless a minor child is also the head of household (i.e. an unaccompanied youth),
   i. Complete the Health Insurance and Disabilities (AKA Health Conditions) tables.

d. To update, Enter an End Date,

e. Add new item being updated

f. For example, to update income
   i. use the Previous and Next buttons under Monthly Income to find the original **Earned Income** item,
      i. Click the Pencil Icon to the left.

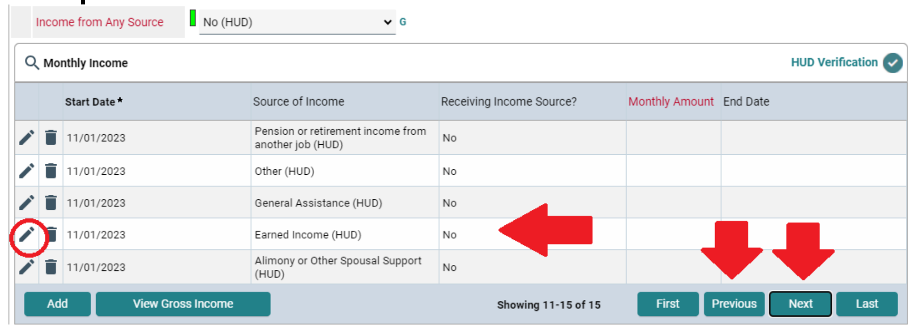
g. In the pop-up window, add an End Date (the date of this Interim) to the item.

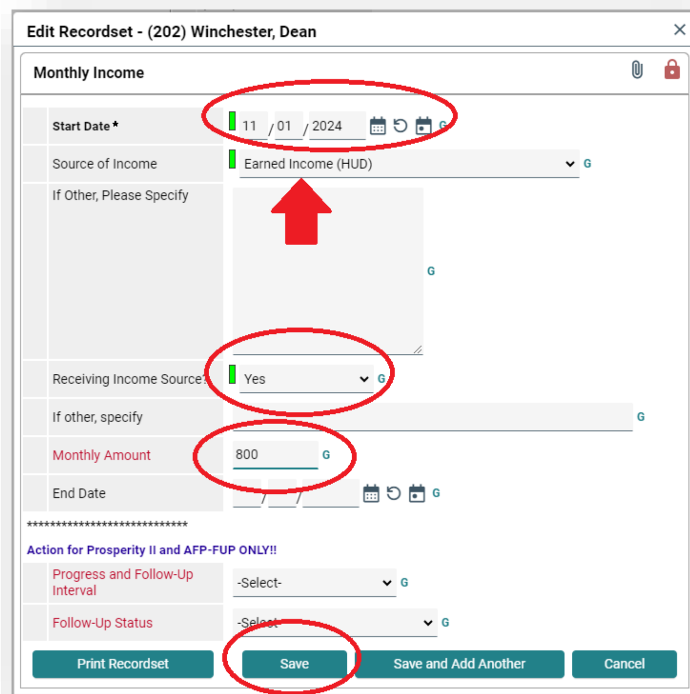
h. Click **Save and Add Another**

i. From the pop-up window, Start Date will be set to the Interim Review date,
   i. Source of Income will be Earned Income
      i. (to replace the item you added an end date to),
         1. Receiving Income Source will be
            a. "Yes" or "No"

j. Click **Save**

1.4 Update HUD Verification Tables



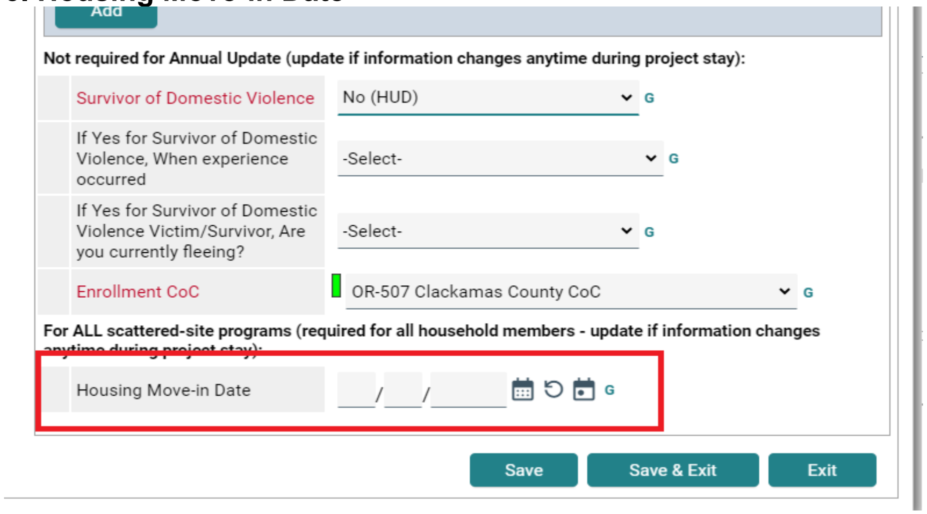


Notes:
All Tables *except* Monthly Income, you will not enter information beyond Dates and Yes/No for clients.

3. **Housing Move-In Date (HMID)**
    a. Housing Move-In Date is recorded by housing projects, including Navigation, Rapid Re-Housing (RRH), SHCM/Retention, and PSH.
    b. On the date the client moves into the unit, or on the project start date if the client was housed prior to program intake, enter an Interim Review.
    c. **Type** will be
        a. "Update"
    d. Navigate to bottom of pop-up,
        a. Enter the **Housing Move-In Date**.
            i. This must be the same date as this interim.
    e. Click **Save & Exit**.

Notes:
Annual reviews are based on the anniversary of the project start date, not the anniversary of the HMID.

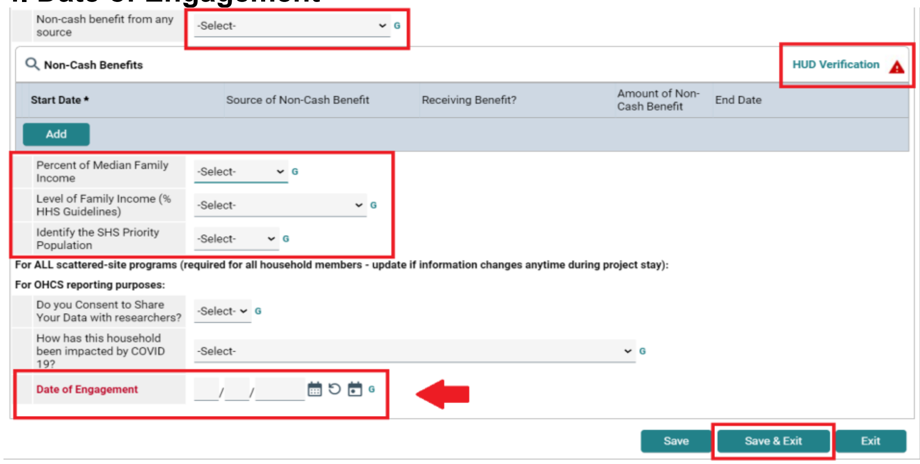
3. Housing Move-in Date



4. Date of Engagement

a. Dates of Engagement are entered as interim reviews for Outreach programs only.
b. You will add an interim review with the **Type** set to Update
c. **Date of Engagement** will be at the bottom of the Interim. Fill it in.
d. Once a client has a Date of Engagement in their Outreach entry, they will be considered to be engaged and tracked for data quality.
    i. All missing data will need to be entered in this interim review
e. Click **Save & Exit**

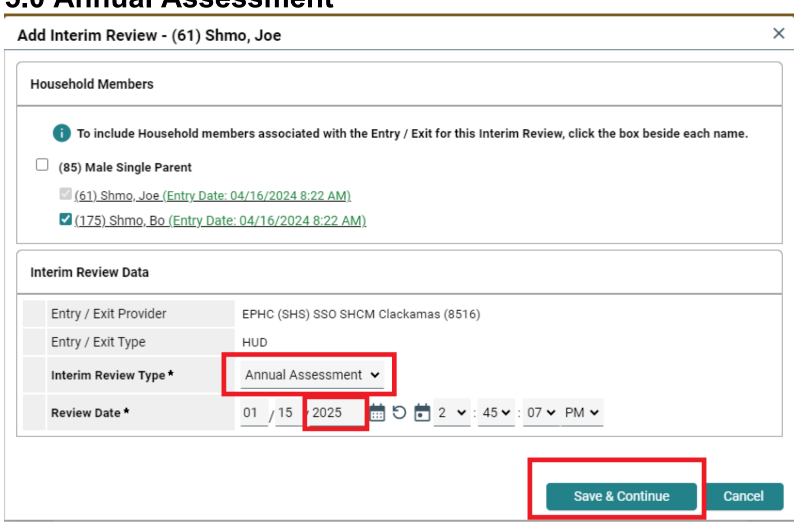
4. Date of Engagement



5.0 Annual Assessment

a. Annual assessments are required for all clients once they have been open in a program for a year or longer.
b. To do an Annual Assessment you will make an Interim Review, set the **Type** to "Annual Assessment," and set the **Review Date** to the anniversary of their Project Start Date.
c. An annual assessment requires you to look at the information that has been entered for a client before, and then update anything that has changed for them (See 1.4 for instructions on updating HUD Verifications).

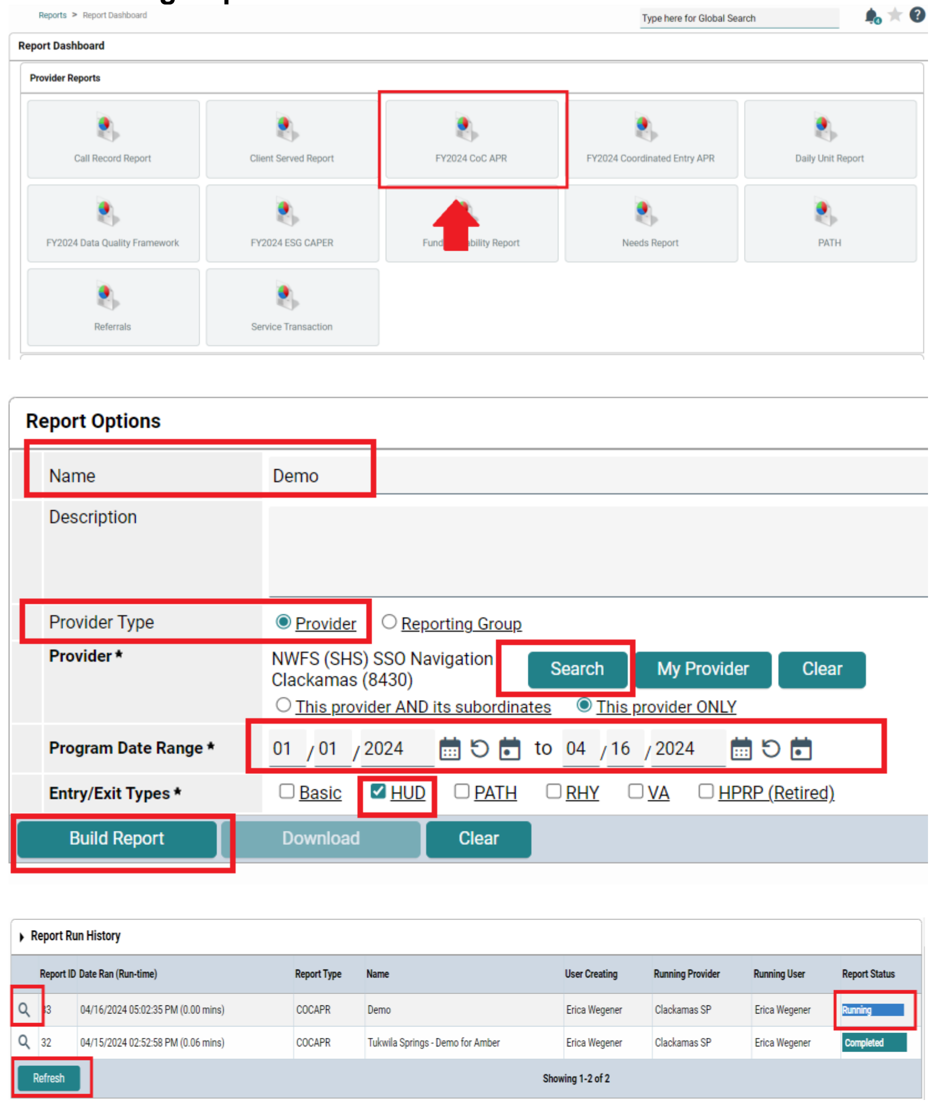
5.0 Annual Assessment



5.1 Running Report to View Past-due Annuals

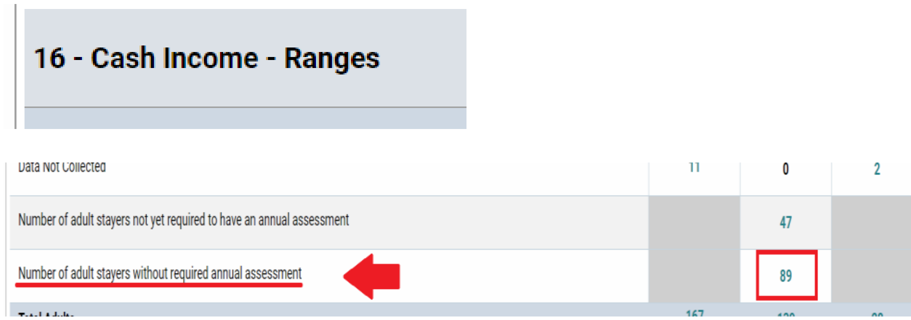
a. There is a report within HMIS that will allow you to see everyone on your program's caseload who needs an Annual.
b. Navigate to the **Reports** page on the left hand side of your screen.
c. On the Reports page, click on the **FY2024 CoC APR** report.
d. Enter the desired report parameters.
e. Name the report.
f. For **Provider Type** you'll select "Provider"
g. **Search** for the specific program desired.
h. Clients who had an open program entry at any point during the **Program Date Range** will appear on the report.
i. The **Entry/Exit Type** either will be HUD or for YEHP-funded programs *only* RHY.
j. Click **Build Report.**
    i. The report will appear in the table at the top of the page.
k. Click **Refresh** until the report is completed.
l. Click the **Magnifying Glass Icon.**
m. Scroll to **Cash Income – Ranges**
n. Find "Number of adult stayers without required annual assessment".
o. Click on the number in that line to pull up a list of the names and HMIS numbers of clients in your program who need Annual Assessments.

5.1 Running Report to View Past-due Annuals



Notes: You can also use this report to find:

- Clients with missing data (Tables 6a, 6b, 6c)
- Clients with Housing Move-In Dates
    - if there are clients who are housed but don't show up as having moved in, you will need to add HMID to their entry (Table 7a, "For PSH and RRH - the total persons served who moved into housing")



16 - Cash Income - Ranges

Data Not Collected	11	0	2
Number of adult stayers not yet required to have an annual assessment		47	
Number of adult stayers without required annual assessment		89	

3.0 Resources

3.1 Referenced Material

- 2024 HUD Data Standards (linked)

3.2 Related Material

- 2024 CoC Program HMIS Manual (linked)

3.3 Contacts

- HMISAdmin@clackamas.us (linked)