

# 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

lient Information			Service Transactions				
Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Summary	Assessmer
	i Reminder	: Household r	nembers must be estab	blished on Household	s tab before crea	ting Entry / Exits	
Entry / Exit							
Program			Туре	Project Start Date	Exit Date	Interims F	ollow Client Ups Count

### 1.1 A



1.1 Add Interim Review

- b. From pop-up window,
  - a. Select
    - i. "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."

### **1.3 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- b. Review all Assessment Questions for all household members are accurate and update any outdated information.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."

usehold Members	
i To include Household	members associated with the Entry / Exit for this Interim Review, click the box beside each name.
(85) Male Single Parent	
(61) Shmo, Joe (Entry D)	ate: 03/18/2024 3:31 PM)
🖉 <u>(175) Shmo, Bo (Entry D</u>	ate: 03/18/2024 3:31 PM)
erim Review Data	AntFarm (SHS) SSO SHCM Youth Clackamas (8967)
Entry / Exit Type	HUD
Interim Review Type *	Annual Assessment 🐱
Review Date *	03 /18 /2025  ☐ 3 ∨ : 43 ∨ : 43 ∨ PM ∨

### **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
  - I. 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"

### 1.4 Update HUD Verification Tables



onthly income		U	•
Start Date *	11 / 01 / 2024 🛗 🖯 🛱 6		
Source of Income	Earned Income (HUD)	G	
If Other, Please Specify	1		
	G		
Receiving Income Source	Yes v G		
If other, specify		G	
Monthly Amount	800 G		
End Date	前 5 🖬 G		
******			
on for Prosperity II and AFP-F	UP ONLY!!		
Progress and Follow-Up Interval	-Select- v G		
Follow-Up Status	-Select V G		
Print Recordset	Save Save and Add Another	Cancel	

Click Save



#### 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

Survivor of Domestic Violence	No (HUD) 🗸 G	
If Yes for Survivor of Domestic Violence, When experience occurred	-Select- 🗸 G	
If Yes for Survivor of Domestic Violence Victim/Survivor, Are you currently fleeing?	-Select- 🗸 G	
Enrollment CoC	OR-507 Clackamas County CoC	∀ G
ALL scattered-site programs (req time during project stay) Housing Move-in Date	uired for all household members - update if infor	mation changes



#### 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

#### 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).

#### 4. Date of Engagement

Non-cash benefit from any source	-Select- V G				
Q Non-Cash Benefits					HUD Verification
Start Date *	Source of Non-Cash Benefit	Receiving Benefit?	Amount of Non- Cash Benefit	End Date	
Add					
Percent of Median Family Income	-Select- v G				
Level of Family Income (% HHS Guidelines)	-Select- 🗸 G				
Identify the SHS Priority Population	-Select- v G				
For ALL scattered-site programs (r	equired for all household members - update	if information changes anytime d	uring project stay):		
For OHCS reporting purposes:					
Do you Consent to Share Your Data with researchers?	-Select- 🛩 G				
How has this household been impacted by COVID 19?	-Select-		✓ 6		
Date of Engagement	/ İ 🖬 🖯 🖬 G	-			
			Save	Save 8	Exit Exit

### 5.0 Annual Assessment

lousehold Members	
i To include Household r	nembers associated with the Entry / Exit for this Interim Review, click the box beside each name.
(85) Male Single Parent	
🗹 <u>(61) Shmo, Joe (Entry D</u>	ate: 04/16/2024 8:22 AM)
(175) Shmo, Bo (Entry)	Date: 04/16/2024 8:22 AM)
nterim Review Data	EPHC (SHS) SSO SHCM Clackamas (8516)
Entry / Exit Type	нир
Interim Review Type *	Annual Assessment 🐱
Review Date *	01 / 15 2025 🛗 🖸 🖶 2 🕶 : 45 🕶 : 07 🗸 PM 🗸
	Save & Continue Can



### 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 YEHPfunded 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.
- I. 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

ort Dashboard					
Call Record Report	Client Served Report	EV2024 Coc APR	FY2024 Coordinated Entry APR	Daily Unit Report	
FY2024 Data Quality Framework	FY2024 ESG CAPER	Fund whility Report	Needs Report	Path	
Referrals	Service Transaction				

#### **Report Options** Name Demo Description Provider Type O Reporting Group Provider Provider \* NWFS (SHS) SSO Navigation My Provider Search Clear Clackamas (8430) ○ This provider AND its subordinates This provider ONLY 🛗 C 🛅 01 / 01 / 2024 🛗 🕤 📩 to 04 /16 /2024 Program Date Range \* Basic 🗹 HUD PATH □ <u>RHY</u> □ <u>VA</u> □ <u>HPRP (Retired)</u> Entry/Exit Types \* Build Report Clear Report Run History Report ID Date Ran (Run-time) Report Status Report Type Q 04/16/2024 05:02:35 PM (0.00 mins COCAPI Clackamas S Q 32 04/15/2024 02:52:58 PM (0.06 mins) COCAPR Tukwila Springs - Demo for Amber Erica Wegene Clackamas SF Erica Wegene Showing 1-2 of 2 Refresh



**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")



# 3.0 Resources

### 3.1 Referenced Material

• <u>2024 HUD Data Standards</u> (linked)

### **3.2 Related Material**

• <u>2024 CoC Program HMIS Manual</u> (linked)

### 3.3 Contacts

• HMISAdmin@clackamas.us (linked)