## **ServicePoint Updating Data/Interim Assessments**

Interim Assessments are completed in order to track change over time. Anytime there is a change with a client, complete an interim assessment.

To start an Interim Assessment, go to the Entry/Exit tab:



- 1. Click on Entry/Exit tab.
- 2. Click on the paper icon beneath "Interims".
- 3. Click "Add Interim Review".

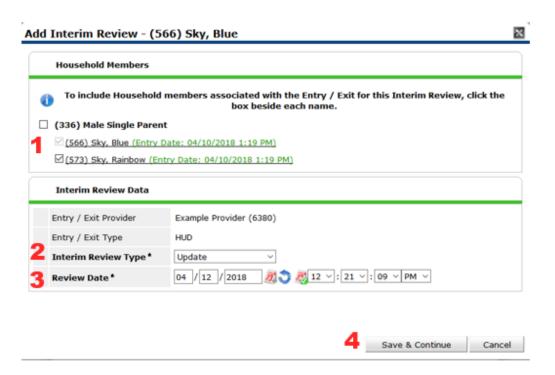


Then...



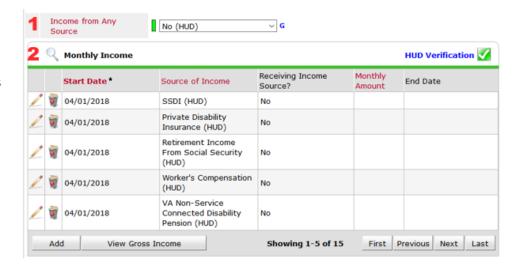
## **Adding Interim Review Steps**

- 1. Include the appropriate HH members
- 2. Interim Review Type
- 3. Review Date: Date changes take place/review takes place
- 4. Save & Continue

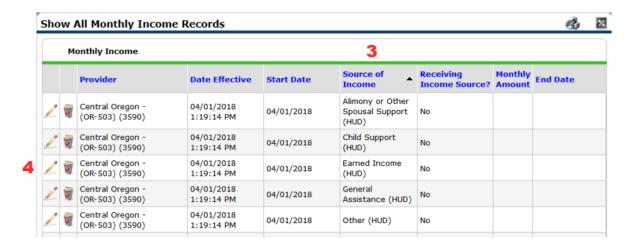


## **Updating HUD Verification**

- 1. Update the Yes/No question
- 2. Click on the magnifying glass



- 3. Sort rows by clicking column headers
- 4. Click pencil to edit



Edit Recordset - (566) Sky, Blue å 🔒 Monthly Income 04 / 01 / 2018 **3 3 8** G Start Date 5. Add end date and Save Source of Income Earned Income (HUD) If Other, Please Specify Receiving Income Source? No If other, specify *∄* 3 ₽ 6 End Date Action for Prosperity II and AFP-FUP ONLY!! Follow-Up Status Print Recordset Save

6. Scroll Down and hit Add to add a new line of data



- 7. Complete the Start Date. If updating Income, complete the Source of Income and Monthly Amount.
- 8. Save Assessment.

