

JOB AID: INTERIM REVIEWS

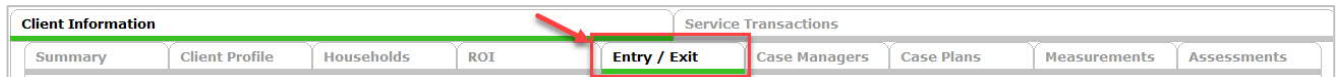
UPDATING CLIENT INFORMATION USING INTERIM REVIEW

To update your client’s assessment data in HMIS, you will need to create an Interim Review. Interim Reviews are completed when there is:







- A change of information of Sub-Assessment UDE’s at any time after project entry (income, health insurance, benefits, disability verification)
- A CoC required Annual Assessment is due.

To add an Interim Review to your Program Entry:

1. From the Clients Client Information Profile click on the Entry/Exit Tab.



2. Click the paper icon in the Interims column of your open program entry.

Entry / Exit		Service Transactions				
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)	HUD	01/25/2021				
Agency B - MTAN Training Site - Street Outreach - City ESG (12476)	HUD	01/21/2021	01/21/2021			

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3. Click the Add Interim Review button on the Interim Reviews Module pop-up window.
4. Check all relevant Household members for which the review is relevant; check the Household type to choose all household members.

Household Members

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

(429577) Female Single Parent

(1448337) Data TEST, Data TEST (Entry Date: 02/23/2021 7:17 PM)

(1455870) Data TEST, Data Test child (Entry Date: 02/23/2021 7:17 PM)

(1455876) Data TEST, Test Child 2 (Entry Date: 02/23/2021 7:17 PM)

- Select the appropriate Interim Review Type from the dropdown list of options:

The screenshot shows a form titled "Interim Review Data". It contains the following fields:

- Entry / Exit Provider: Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)
- Entry / Exit Type: HUD
- Interim Review Type: A dropdown menu is open, showing options: -Select-, 30-Day Review, 60-Day Review, 90-Day Review, 120-Day Review, 180-Day Review, Routine Info Update, Annual Assessment, **Update** (highlighted in blue), and Aftercare (Post Exit). A red arrow points to the dropdown arrow.
- Review Date: A date and time picker showing 02/23/2021 07:23:20 PM.

Buttons at the bottom: Save & Continue, Cancel.

Note: The Housing Move-In Date must be recorded under the "Update" Interim Review Type.

- Ensure to enter the correct Review Date if not entering the same day the review is effective.

Note: Annual Assessments (required for CoC programs) must be completed within 30 days of the Anniversary Date of Project Entry

- Click Save & Continue to proceed to the MSHMIS Update Assessment.

The screenshot shows the "Entry / Exit Interim Review" form. The "Interim Review Data" section is filled out as follows:

- Entry / Exit Provider: Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)
- Entry / Exit Type: HUD
- Interim Review Type: Update
- Review Date: 02/23/2021 07:23:20 PM

The "Interim Review Assessment" section is titled "Select an Assessment" and contains several checkboxes:

- MSHMIS CoC Intake
- Detroit Housing Match Assessment
- Poverty Solutions Youth Education Assessment
- CAM Alternative Shelter Assessment
- MSHMIS Update** (highlighted in green)

Below this, there are sections for "Household Members" and "MSHMIS Update".

Household Members:

- (1448337) Data TEST, Data TEST: Age: 21, Veteran: Yes (HUD)
- (1455870) Data TEST, Data Test child: Age: Unknown, Veteran: Unknown
- (1455876) Data TEST, Test Child 2: Age: Unknown, Veteran: Unknown

MSHMIS Update: Interim Review Date: 02/23/2021 07:32:58 PM

PLEASE UPDATE ANY RESPONSES THAT HAVE CHANGED SINCE ENTRY/LAST REVIEW

Health and Disability Information:

- Covered by Health Insurance: -Select-

Health Insurance: HUD Verification

Start Date *	Health Insurance Type	Covered?	End Date
Add			

Pregnant?: -Select-

If Yes, Projected Birth Date: []/[]/[]

- Verify existing data for accuracy and update the MSHMIS Update Assessment with the new details.

Note: When updating data, It is important that you never overwrite your history in sub-assessments. These sub-assessments include Monthly Income, Non-Cash Benefits, Health Insurance and Disabilities.

To reflect a change in a sub assessment:

- a. Locate the sub-assessment record that needs updating.

Family Income and Non-Cash Benefit Information

Total Monthly Income G

Income from Any Source G

Monthly Income HUD Verification

	Monthly Amount	Source of Income	Receiving Income Source?	Start Date *	End Date
		Other (HUD)	No	02/04/2021	
		Child Support (HUD)	No	02/04/2021	
		VA Non-Service Connected Disability Pension (HUD)	No	02/04/2021	
		Alimony or Other Spousal Support (HUD)	No	02/04/2021	
	US\$500.00	Earned Income (HUD)	Yes	02/04/2021	

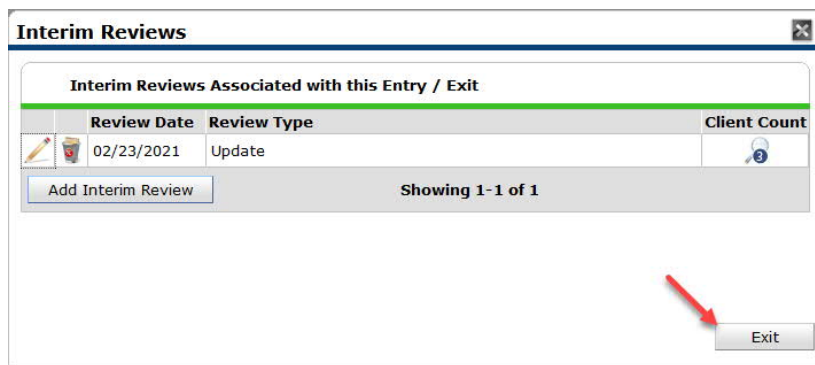
Add View Gross Income Showing 11-15 of 15 First Previous Next Last

- b. Add an end date on the current record indicate the information is no longer accurate as of that date then add a new record to show the updated information. Make sure the start and end dates for the sub-assessment records you are updating, do not overlap.
- c. Make sure to update the record for the income source that was created at Entry. If the client had no income at Entry but later started earning income, you will need to reflect that in the Monthly Income sub-assessment, by end dating the original entry and adding the new record.

Show All Monthly Income Records

	Provider	Monthly Amount	Source of Income	Receiving Income Source?	Start Date	End Date
	Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)		Alimony or Other Spousal Support (HUD)	No	02/04/2021	
	Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)		Child Support (HUD)	No	02/04/2021	
	Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)	US\$500.00	Earned Income (HUD)	Yes	02/04/2021	02/18/2021
	Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)	US\$600.00	Earned Income (HUD)	Yes	02/19/2021	
	Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)		General Assistance (HUD)	No	02/04/2021	

9. Click Save to save the assessment data and proceed to the next household member (if applicable).
10. Follow the same process to complete the Assessment for each member of the Household.
11. Click Save & Exit when you have completed the data entry of the last Household Member.



12. Click Exit on the Interim Reviews pop-up window.

This will return you to the Entry/Exit Tab of the Client Information Profile, where you will be able to see that 1 interim has been completed.

Entry / Exit						
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)	HUD	01/25/2021		1		1
Agency B - MTAN Training Site - Street Outreach - City ESG (12476)	HUD	01/21/2021	01/21/2021			1

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