

*Interim Review*<sup>TM</sup>

**Workflow For  
PATH and Street  
Outreach**

## Entry/Exit

1. Enter the Client record and Go to the Entry/Exit Tab.
2. Click on the icon under the Interim column in the appropriate Program Entry.

Client Profile - ServicePoint

m/harfordcounty\_training/com.bowmansystems.sp5.core.ServicePoint/index.html#loadClient;clientId=16321

ng Site  
ment

Mode: Shadow  
Back Date

Profile

Type here for Global Search

Client - (16321) Client, Ricky

(16321) Client, Ricky  
Release of Information: None

-Switch to Another Household Memb

Client Information

Summary Client Profile Households ROI **Entry / Exit** Service Transactions Case Managers Case Plans Measurements As:

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Entry Date	Exit Date	Interims
Upper Bay PATH Street Outreach (285)	HUD	03/27/2017		

Add Entry / Exit

Showing 1-1 of 1

## Interim Review

Click on the “Add Interim Review” tab.  
An additional box will pop up.

The screenshot displays a software interface with a client profile for "Client, Ricky". Below the profile, there is a section titled "Interim Reviews" which contains a table with the following headers: "Review Date", "Review Type", and "Client Count". The table currently shows "No matches." and an "Add Interim Review" button. A red arrow points from the text above to this button. The background interface includes tabs for "Service Transactions" and "Case Pl...", and a list of entries with columns for "Date" and "of 1".

Review Date	Review Type	Client Count
No matches.		

## Interim Review

1. “Interim Review Type” should be set as “Update”

2. The “Review Date” will be the outreach date.

Be sure to clear it out and use the calendar to select the date so that 12:00:00 PM is the time stamp.

3. Save & Continue

com.bowmansystems.sp5.core.ServicePoint/index.html#loadClient;clientId=16321

### Add Interim Review - (16321) Client, Rick

Interim Review Data	
Entry / Exit Provider	Upper Bay PATH Street Outreach (285)
Entry / Exit Type	HUD
Interim Review Type *	Update
Review Date *	03 / 28 / 2017 12:00:00 PM

Save & Continue Cancel

Exit

Update

Make any updates to income, non-cash benefits, insurance and/or disability

If someone other than the head of household has changes, be sure to go into that client's record and make the updates.

Point/index.html#loadClient;clientId=16321

Client Location \* MD-502 G

Total Monthly Income \* 0 G

Income from Any Source \* No (HUD) G

**Monthly Income**

Monthly Amount	Source of Income	Start Date *	End Date
Add View Gross Income			

Non-cash benefit from any source \* No (HUD) G

**Non-Cash Benefits**

Amount of Non-Cash Benefit	Source of Non-Cash Benefit	Start Date *	End Date
Add			

Covered by Health Insurance \* No (HUD) G

**Health Insurance**

Start Date *	Health Insurance Type	Covered?	End Date
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## Add the Outreach contact

1. Fill out the information about the Outreach.

2. Save this Recordset.

	Date of Contact	Location	Start Date *	End Date
 	03/27/2017 12:00:00 PM	Place not meant for habitation	03/27/2017	03/27/2017

Add      Showing 1-1 of 1

Date of Engagement     /  /     G

Date of PATH Status Determination     /  /     G

Client Became Enrolled in PATH    -Select- ▼ G

If no, reason not enrolled    -Select- ▼ G

Connection with SOAR    -Select- ▼ G

Save    Save & Exit

Add Recordset - (16321) Client, Ricky

Outreach

Date of Contact     /  /     ▼ :  :   G

Location    -Select- ▼ G

Start Date \*    03 / 28 / 2017    G

End Date     /  /     G

Save    Save and Add Another    Cancel

03/27/2017 12:00:00 PM	Place not meant for habitation	03/27/2017	03/27/2017
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3. If PATH, fill out Date of Engagement, Status, Enrolment information and SOAR if appropriate.

4. Save & Exit

Update

You should now see the Update is listed.  
Click on the “Exit” button.

Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
03/28/2017	Update	1

Add Interim Review

Showing 1-1 of 1

Exit

Continue to exit out of the screens until you are back to the Client Search page.  
Repeat this process for any other clients.