

# Set a 6 Month Follow Up Goal in ServicePoint

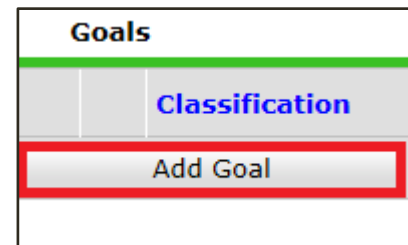


# Key Points About the 6 Month Follow Up

- Follow Ups are to be completed six months after a client exits the program into Permanent Housing.
- The Follow Up is the basis for the Permanent Housing Retention Rate, which is an annual performance measure required for OHCS funded projects.
- The client must have an exit date to *complete* the six month Follow Up assessment.

# Getting Started

- Select the client that needs the Follow Up
- Click on the Client Information tab, then click on the Case Plans tab
- Within that tab, click on Add Goal
- This will generate a large Goal pop-up for you to fill out



# Setting the Goal

- For Classification, you will select Follow-Up
- For Type you will select 6-Month Follow Up
- Target Date should be set for 6 months out
- Overall Status should be In Progress

**Goal**

**Goal - (30) Johnson, Andrew A**

**Household Members**

**To include Household members for this Goal, click the box beside each name. Only members from the SAME Household may be selected.**

(10) Single Individual

(30) Johnson, Andrew A

**Provider \*** ROCC - Rural Oregon  
Continuum of Care (OR-505)  
(3339)

**Case Manager** -Select- ▾

**Date Goal was Set \*** 05 / 01 / 2017

**Classification \*** -Select- ▾

**Type \*** -Select- ▾

**Goal Description**

**Target Date** / /

**Overall Status \*** -Select- ▾

**If Closed, Outcome** -Select- ▾

**If Partially Complete, Percent Complete** -Select- ▾

# Setting the Goal: Continued

- Projected Follow Up is for 6 months out
- Once you have set the Goal, you will see a Follow Up List in your User Dashboard
- When a Goal becomes due, click on the Client ID

The screenshot shows a form for setting a goal. The 'Projected Follow Up Date' field is highlighted in red and contains '05 / 02 / 2017'. The 'Follow Up User' field is highlighted in green and shows 'ROCC - Rural Oregon Continuum of Care (OR-505) (3339)' with a dropdown menu set to 'Jennifer Ross'. The 'Completed Follow Up Date' field is highlighted in blue and is empty. The 'Outcome at Follow Up' field is highlighted in yellow and is set to '-Select-'. There are 'Add Goal' and 'Cancel' buttons at the bottom right.

Follow Up List (1)			
Client ID	Type	Date	Time Rem
30	Goal	05/02/2017	1 Day

# Completing the Follow Up

- Complete the steps below. Once the data is input and saved, the Housing Outcomes Assessment will display

**ClientPoint > Client Profile**

Type here for Global Search

### Add Follow Up Review - (161) Marshhfield, Steven

Household Members

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

- (103) Two Parent Family
  - (161) Marshhfield, Steven (Exit Date: 12/30/2015 3:43 PM)
  - (162) Marshhfield, Sarah (Exit Date: 12/30/2015 3:43 PM)
  - (163) Marshhfield, Steven, Jr. (Exit Date: 12/30/2015 3:43 PM)
  - (164) Marshhfield, Tabitha (Exit Date: 12/30/2015 3:43 PM)
  - (165) Marshhfield, Toby (Exit Date: 12/30/2015 3:43 PM)
  - (168) Marshhfield, Abigail (Exit Date: 12/30/2015 3:43 PM)

Check the top box for all family members, or just check the box for each family member.

If you only select the children, they will show up as **Individuals** in HUD reporting. This will cause an error in HUD Reporting.

Follow Up Review Data

Entry / Exit Provider: UCAN-DC - Madison Place - SHELTERPOINT [ROCC] (3509)

Entry / Exit Type: HUD

**Follow Up Review Type\***: **6-Month Review**

Review Date\*: 3 : 45 : 38 PM

4<sup>th</sup> Check **6-Month Review** in **Follow up Review Type\***

5<sup>th</sup> Click **Save & Continue** and then the **Housing Outcomes** assessment will display

1<sup>st</sup> Click on the **Entry/Exit** tab

2<sup>nd</sup> Click on the **Follow Ups** icon.

3<sup>rd</sup> Click on **Add Follow Up** in **Follow Up Review** pop-up box

Follow Up Reviews

Follow Up Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
Add Follow Up Review		
No matches.		

Exit

**Follow Ups** are completed six months after client enters Permanent Housing and are required by the State of Oregon. Client must have an exit date to complete the six month follow up.

# Housing Outcomes Assessment

- Click Add on the Housing Placement and Retention Outcomes Assessment
- Enter the data into the assessment and click Save
- Then click Save and Exit

**Housing Outcomes** Follow Up Review Date: 04/14/2017 09:14:41 AM

**Housing Placement & Retention Outcomes**

Reporting Program	Housing Outcome Intervention Type	Initial Placement/Eviction Prevention Date	End of Subsidy Date	Follow Up Interval	Follow Up Due Date	Actual Follow Up Date	Is Client Still in Housing?
<input type="button" value="Add"/>							




**Add Recordset - (30) Johnson, Andrew A**




**Housing Placement & Retention Outcomes**

Reporting Program:  G

Housing Outcome Intervention Type:  G

Housing Placement Information:




Initial Placement/Eviction Prevention Date:  /  /     G

End of Subsidy Date:  /  /     G




Follow-Up Schedule:

What event triggered this follow-up?:  G

Follow Up Interval:  G




Follow Up Due Date:  /  /     G

Actual Follow-Up Outcome:

Actual Follow Up Date:  /  /     G

Follow-Up Status:  G

Is Client Still in Housing?:  G

Leave Blank:  /  /     G

# Final Steps

- Click on the Home Module, click on the Goal for the client that you just assessed
- Fill out the info about the Follow Up that you just completed
- Then click Save & Exit
- The Goal will no longer appear in your user dashboard

Client ID	Type	Date	Time Remaining
30	Goal	05/02/2017	1 Day

Follow Up User	ROCC - Rural Oregon Continuum of Care (OR-505) (3339)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>	
	Jennifer Ross				
Follow Up Made	-Select-				
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="button" value="↺"/>	<input type="button" value="↻"/>	<input type="button" value="↷"/>	
Outcome at Follow Up	-Select-				
				<input type="button" value="Add Goal"/>	<input type="button" value="Cancel"/>