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
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
Completing the Follow Up

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

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
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