ClientPoint Module
Update/Annual Assessment Workflow

Note: If your default provider log-in is not the project where data is to be entered, then:

- Click the "**Enter Data As**" function (upper right hand corner) to switch to the correct program.

Note: Click "**Back Date**" function (upper right hand corner) if entering data from a previous date, then:

- Change the date to the information date.

Note: Follow the Entry/Exit Workflow, this sheet will ***emphasize*** specific steps to be taken for Update/Annual Assessments.

ClientPoint

1. Locate an Existing Client or Add a New Client
2. Enter a Release of Information
3. Create an Entry
4. Entry Assessment
5. Enter Service(s) as needed.
6. ***Create an Update***
    a. Go to the "Entry/Exit" Tab
        i. Find the appropriate Entry and click on the "Interim Review Icon".
        ii. In the popup click the "Add Interim Review" button.
            1. **Type:** Select Update. (Annual Assessment should only be completed within 30 days of project Entry Date anniversary.)
            2. **Review Date:** Enter the date the assessment was completed.
                a. Click "Save & Continue"
        iii. Assessment
            1. Complete the assessment.
        iv. ***Sub-Assessment***

To update the information in the Income, Non-Cash Benefits, Health Insurance, or Disabilities sub-assessments you must first End the current source/amount.

1. Click the pencil next to the ending source/disability.
    i. Enter the **End Date**.
        1. Click "Save and Add Another".

Income and Non-Cash Benefits (Update Only)

2. **Amount:** Amount must be entered for Income, optional for NCB.
3. **Source:** Select appropriate Source.
4. **If Other:** Enter "Other" income source.
5. **Receiving Income/Benefit:** Answer "Yes".
6. **Start Date:** Enter date the client began receiving the Income/Benefit.
7. **End Date:** Leave blank until the client stops receiving the Income/Benefit.

Health Insurance (Update Only)

8. **Start Date:** Enter date the client first had type of Insurance.
9. **Health Insurance Type:** Select appropriate Type.
10. **Covered:** Select "Yes".
11. **If Private Pay: HOPWA Projects Only**
12. **If No** (Not Covered)**: HOPWA Projects Only**
13. **End Date:** Leave blank until the client stops receiving the Insurance Type.

Disability (Update Only)

14. **Disability Type:** Select appropriate Type.
15. **Determination:** Select “Yes”.
16. **Long Duration:** Answer appropriately.
17. **Documentation:** Answer appropriately.
18. **How Confirmed: PATH Projects Only**
19. **SMI? How Confirmed: PATH Projects Only**
20. **Receiving Services:** Answer appropriately.
21. **Start Date:** Enter Start Date
22. **Note:** Enter appropriate note(s).
23. **Long Term:** Answer appropriately.
24. **End Date:** Leave blank until the disability no longer applies.
    a. Click “Save & Exit”

7. Create Updates/Annual Assessment as needed.
8. Create an Exit

Example 1: Client has increased their income from Employment. They also signed up for and receive SNAP. Since employment has increased they are now eligible to receive Health Insurance through their employer.

Example 2: Clients Income has not changed, but they have started receiving MEDICAID (MediCal) and SNAP (CalFresh).

Example 3: Client has been recently diagnosed with a Mental Illness that will impair their ability to live independently. They have been approved for SSDI and MediCare.