

# Update an Entry

Entry updates should be used whenever one or more of the following conditions apply:

- The client moves from unhoused to housed
- The client experiences a change in income, benefits, or health insurance
- A periodic update is contractually required
- For county-funded programs, a client has met a ROMA goal

To add an update to your existing entry, start by opening your client’s profile and scrolling down to the Entry/Exits dashlet. Find your open entry and click on the edit pencil by the project start date.

**Client - (26860) Bowman, Test A**

(26860) Bowman, Test A  
Release of Information: Ends 10/07/2020

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | Measurements | Assessments

Added to the system 07/12/2007 02:25 PM

Name	Bowman, Test A	Gender	Trans Female (MTF or Male to Female)
Date of Birth	01/01/1998 (Age 21)	Primary Race	Client doesn't know (HUD)
Social Security	555-55-5555	Secondary Race	
		U.S. Military Veteran?	No (HUD)

Release of Information				Entry/Exits			
Provider	Permission	Start Date	End Date	Program	Type	Project Start Date	Exit Date
The Giving Closet	Yes	08/17/2016	08/17/2043	HSC Diversion	HUD	10/25/2019	
ASPIRE - HOME - COUNTY	Yes	11/06/2018	11/06/2022	HSC Prevention Diversion	HUD	04/25/2019	
SOAR Applicant Tracking Assessment	Yes	10/17/2019	10/17/2021				
CSNW - FCS	Yes	10/17/2019	10/17/2021				

Add Entry / Exit      Showing 1-2 of 2

Do not change anything on this pop-up, simply click Save and Continue.

**Edit Project Start Data - (26860) Bowman, Test A**

Household Members

To update Household members for this Entry Data, click the box beside each name.

- (43201) Couple With No Children
  - (26860) Bowman, Test A (Entry Date: 10/25/2019 12:00 AM)
  - (99994) Bowman, Charise A (Entry Date: 10/25/2019 12:00 AM)

Include Additional Household Members

**Edit Project Start Data - (26860) Bowman, Test A**

Provider: HSC Diversion (2300)  
Type: HUD  
Project Start Date: 10 / 25 / 2019 12:00:00 AM

Save & Continue      Cancel

Click on the small paper icon under Interims at the top of the page.

Provider\* HSC Diversion (2300) Search My Provider Clear  
 Type\* HUD Update

**Household Members Associated with this Entry / Exit**

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
<input type="checkbox"/>	(26860) Bowman, Test A	Yes	10/25/2019		<input type="checkbox"/>				
<input type="checkbox"/>	(99994) Bowman, Cherise A	No	10/25/2019		<input type="checkbox"/>				

Include Additional Household Members Showing 1-2 of 2

Click the Add Interim Review button on the next small pop-up.

**Interim Reviews**

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
No matches.		

Add Interim Review Exit

Ensure all household members that need to be updated are checked, set the correct Interim Review Type (Update, unless this is a contractually mandated update with a specific timeframe), and set the Review Date to the effective date of the changes. Click Save and Continue.

**Add Interim Review - (26860) Bowman, Test A**

**Household Members**

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

- (49201) Couple With No Children
- 26860) Bowman, Test A / (Entry Date: 10/25/2019 12:00 AM)
- 99994) Bowman, Cherise A / (Entry Date: 10/25/2019 12:00 AM)

**Interim Review Data**

Entry / Exit Provider: HSC Diversion (2300)  
 Entry / Exit Type: HUD  
 Interim Review Type\*: Update  
 Review Date\*: 10 / 28 / 2019

Save & Continue Cancel

Update all fields where the client has experienced a change in the same way you completed their original entry. All fields except sub-assessments can be updated simply by changing the answer; for sub-assessment updates, please see "Completing and Changing Sub-Assessments" cheat sheet. When all household members have been updated correctly, click Save and Exit at the bottom of the interim. You have updated your client's entry!

Note: If you are clicking Save and Exit and nothing is happening, you may have scrolled below the bottom of the interim and are seeing the Save and Exit of the original entry. Scroll to the top of the interim and scroll through those questions specifically until you see the Save and Exit for the interim.