SERVICEPOINT V5.7

SOFTWARE UPGRADE

RELEASE NOTES

SERVICEPOINT 5.7 UPGRADE HIGHLIGHTS

There are many improvements and additions to *ServicePoint* 5.7. Several notable items are marked with red asterisks. **

- ❯ Assessments
  - Answer History Date and Time
  - Assessment Goal Links and Tabbing
- ❯ Client Merge
  - Client Merge with a Space in the Middle Name
- ❯ *ClientPoint*
  - Household Member Sorting
  - Printing of Release of Information Records
  - Goal Description Field
  - Linking File Attachments to Client Data Objects **
  - File Attachment Sorting
- ❯ Entry/Exits
  - Entry/Exit Interim and Follow up Reviews **
  - Entry/Exits with Multiple Assessments **
  - Printing of Entry/Exits **
- ❯ General
  - Service Code Search Formatting
- ❯ Provider Admin
  - Provider Admin Parent Provider Link
- ❯ Service Transactions
  - Service Location **
  - ClientPoint View Shelter Stay Updated
  - Need Status Labels
  - Provider Service Staff on Multiple Services
  - Showing Linked Goal on Service Transactions
- ❯ *SkanPoint*
  - Scanning Same Client More than Once **
- ❯ ART
  - Entry Exit Review Universe Definitions **

ASSESSMENT UPDATES

Answer History Date and Time

In addition to the date, the time also now displays in the **Date Effective** column of the **Answer History** popup window for assessment questions.

Assessment Goal Links and Tabbing

In order to speed up data entry when using the tab key to navigate *ServicePoint*, a user setting was added to control whether or not the **G** goal link will be included in the tabbing order on assessments. The user setting is labeled "Allow User to tab to Goal links within Assessments" and is not selected by default.

CLIENT MERGE UPDATE

Client Merge with a Space in the Middle Name

ServicePoint 5.7 fixes an issue that prevented merging of clients if one of the clients had a space in the middle name.

CLIENTPOINT UPDATES

Household Member Sorting

Updated the sorting of the **Household Members** list in the assessment sections of the **Entry/Exit Data** popup window and the **Household Information** popup window to be consistent with one another. Now the household members are sorted by head of household then client name.

Printing of Release of Information Records

ServicePoint 5.7 adds the ability to print a release of information record. (See Figures 1-1 and 1-2)

Figure 1-1

Figure 1-2

Goal Description Field

On the **Goal** popup window, added a **Goal Description** text area that may be used to provide more details about the goal or to enter a client's own description of the goal.

Linking File Attachments to Client Data Objects

ServicePoint 5.7 adds the ability to associate a file attachment with an assessment, a sub assessment recordset, a release of information, a goal, an action step, or an **Entry/Exit**. It is now possible to add a file attachment while editing any of these client data objects. (See Figure 1-3)
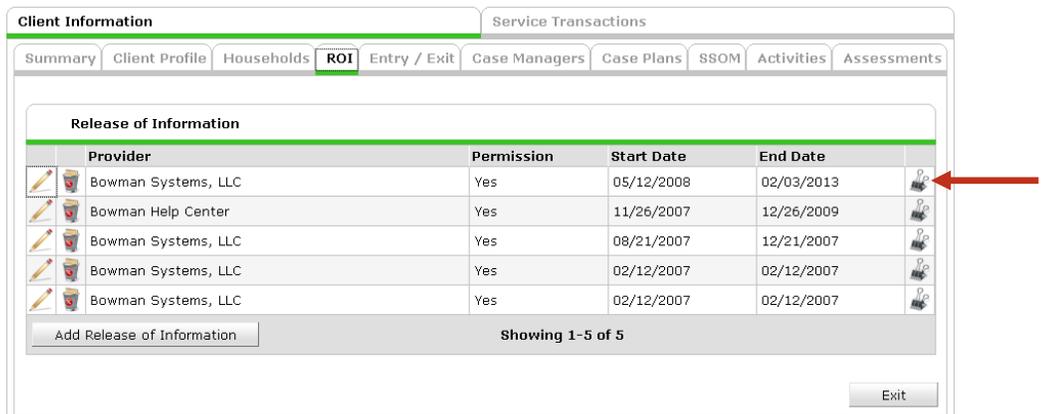
Figure 1-3

Click the file attachment icon ![icon] to add an attachment to the ROI. This will open the File Attachment window. (See Figure 1-4)
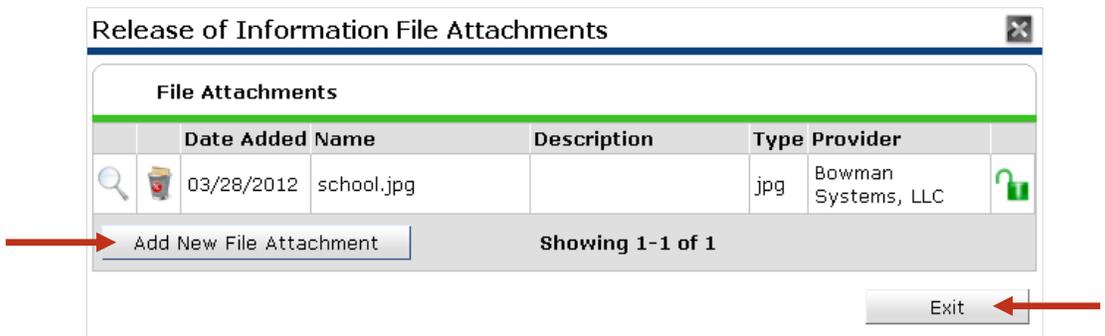

Figure 1-4

Add as many file attachments as you wish and click **Exit** to return to the ROI window. (See Figure 1-5)
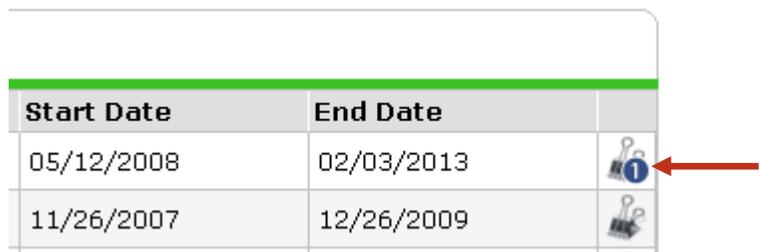

Figure 1-5

Notice the file attachment icon ![icon] updates to show how many attachments are associated with each ROI.

A file attached to a release of information, client profile, or call record will have the provider's default file attachment visibility. A file attachment added to a client data object likely contains information pertaining to that client data object; therefore, a file attached to an assessment, a sub assessment recordset, a goal, an action step, or an **Entry/Exit** will initially inherit its visibility settings from the object to which the file is attached instead of the provider's default file attachment visibility. After the file attachment has been uploaded, its visibility settings are independent of the object to which it was added.

> *Note:* If more than one household member is selected at the time the file attachment is added, the visibility settings on the file attachment will apply for *all* the attached household members. Changing the visibility settings on the file attachment from one client will change the visibility settings on the file attachment for all the other clients that were included. To make visibility settings of the file attachment for each client independent, upload a copy of the file attachment from each client and do not include household members upon uploading.

> *Note:* Deleting a file attachment only removes the file attachment from the current client; it does not remove the file attachment for any included household members.

File Attachment Sorting

ServicePoint 5.7 adds the ability to sort the **File Attachments** tables in *ClientPoint* by clicking the column headers.

ENTRY/EXIT UPDATES

Entry/Exit Interim and Follow Up Reviews

ServicePoint 5.7.0 includes the addition of **Entry/Exit** interim and follow up reviews to support the need of agencies to periodically assess a client following a client's entry into a program. An interim review includes assessment data and a review date that falls between the **Entry** date and the **Exit** date. A follow up review includes assessment data and a review date that occurs after the **Exit** date. Each type of review may include a client and household members who have been included in the **Entry/Exit** record. Only clients who already have an **Exit** date may be included in a follow up review. Each client may have any number of interim and follow up reviews associated with a given **Entry/Exit** record.

Using an **Entry/Exit** interim or follow up review creates point-in-time data linked to an **Entry/Exit** record which can be used to create more robust client reporting by making it easier to report on a client's state as it changes over time.

To use **Entry/Exit** interim and follow up reviews, the system preference **Use Entry/Exit Interim and Follow Up Reviews** must be selected. (See Figure 1-6)

Figure 1-6

Once the system preference has been selected, a *ClientPoint* module setting of the same name will become available, which must also be selected. To find this, go to **Provider Admin**, search for and select a provider, click the **Module Settings** tab, then the **ClientPoint Module Settings** link. (See Figure 1-7)

Figure 1-7

Click the checkbox and **Save** the settings.

Interim and follow up reviews may be added or edited by clicking the icons in the **Interims** and **Follow Ups** columns that have been added to the **Entry/Exit** tabs in *ClientPoint* and *CallPoint.* (See Figure 1-8)

Figure 1-8

The review icons can also be found in the **Household Members Associated with this Entry/Exit** table in the **Entry/Exit Data** popup window. Clicking one of the icons will open a popup window that contains a list of existing reviews and a button that will allow the user to add a review. The **Interims** and **Follow Ups** columns also display the number of existing interim and follow up reviews. (See Figure 1-9)

Figure 1-9

After clicking the **Add Interim Review** button or the **Add Follow Up Review Button**, a new popup window will appear in which the user will select household members to include in the review, set the **Interim Review Type** or the **Follow Up Review Type**, respectively, and the **Review Date**. (See Figure 1-10)

Figure 1-10

If it is an interim review, all household members who were included in the **Entry/Exit** record may be included in the review. If it is a follow up review, only those household members who were included in the **Entry/Exit** and also have an exit date may be included in the review.

An interim review must be dated after the **Entry** date and before the **Exit** date. A follow up review must be dated after the **Exit** date.

After selecting the household members to include, the **Interim Review Type** or the **Follow Up Review Type** and the **Review Date**, click the **Save & Continue** button to access the review assessment section. (See Figure 1-11)

Figure 1-11

Each review may be assigned a default assessment, and may also display multiple assessments. Set the default assessment and multiple assessments options on the **Provider Admin Assessments** tab. (See Figure 1-12)

Figure 1-12

Entry/Exits with Multiple Assessments

ServicePoint 5.7 includes the ability to display multiple assessments on any **Entry/Exit** event, including the **Entry**, the E**xit**, and interim and follow up reviews. (See Figure 1-13)

Figure 1-13

The option to display multiple assessments is controlled by the **Allow Multiple Assessments** column of the new **Entry/Exit Assessment Display** table on the **Assessment Display Settings** tab in **Provider Admin**.

The assessments that display if the option is selected are the **Client Record** assessments that have been assigned to the provider, except for **Household Data Sharing** which is controlled by its own settings.

The check icon next to each assessment name changes color depending on the number of household members for which the assessment has been viewed since the **Entry/Exit** popup window was opened.

Figure 1-14

If the assessment hasn't been saved for any of the household members, the check icon will be gray. If the assessment has been saved for all the household members in the **Household Members** list, the icon will be green. **(1)** If the assessment has been saved for some but not all the household members in the **Household Members** list, then the icon will be yellow. **(2)**

> **Note:** *Going between household members auto-saves information. Therefore, if you click the name of another household member and then return, the assessment will be yellow.*

Printing of Entry/Exits

ServicePoint 5.7 includes the ability to print an **Entry/Exit** record.

GENERAL UPDATE

Service Code Search Formatting

ServicePoint 5.7 corrects the text alignment in the service code search results. (See Figure 1-15)
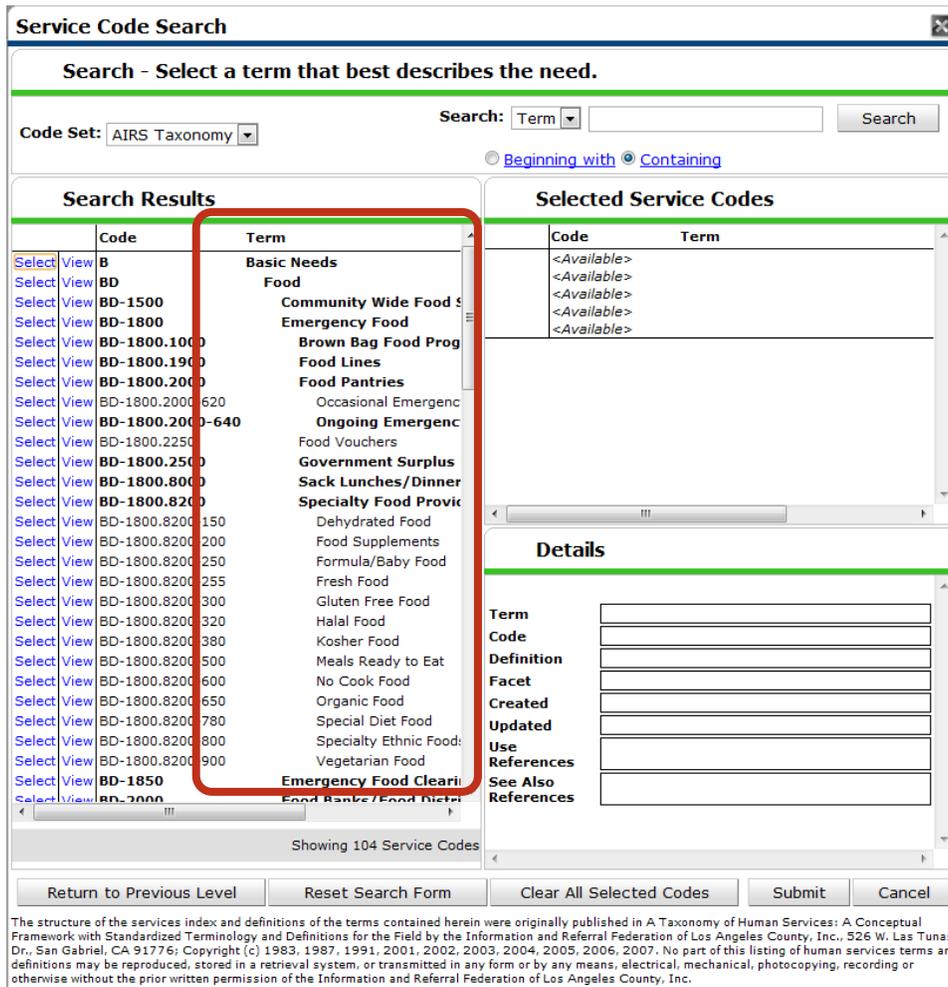
Figure 1-15

When drilling down through the service terms, the indentation of the items in the **Term** column now correctly indicates the hierarchy. Previously, the indentation was not working correctly.

PROVIDER ADMIN UPDATE

Provider Admin Parent Provider Link

ServicePoint 5.7 fixes a minor issue on the **Provider Admin** page in which the blank area following the **Parent Provider** link behaved as a link when clicked, causing the user to accidentally jump to the other provider. (See Figure 1-16)

Figure 1-16

SERVICE TRANSACTION UPDATES

Service Location

It is now possible to indicate the location of a service using the **Service Location** picklist. (See Figure 1-17)

Figure 1-17

A system preference labeled **View Service Location** controls whether the picklist is available. (See Figure 1-18)

Figure 1-18

Bowman Systems support can have this option turned on or off as requested. The options available within the picklist are controlled at the provider level on the **Services** tab in **Provider Admin**. (See Figure 1-19)

Figure 1-19

ClientPoint View Shelter Stay Updated

ServicePoint 5.7 updates the *ClientPoint* **View Shelter Stay** screen to include the **Supplies Returned** field and to better handle the display of a stay in an overflow unit. The **View Shelter Stay** screen also will now update after the user closes the **Edit Shelter Stay** popup window to reflect the changes made in the **Edit Shelter Stay** popup window.

Need Status Labels

ServicePoint 5.7 changes the labels of the need status fields on **Add** and **Edit Service** screens to clarify that the fields relate to a need and not to the service. Now the fields formerly labeled **Status**, **Outcome** and **If Not Met, Reason** are labeled **Need Status**, **Outcome of Need**, and **If Need is Not Met, Reason**, respectively. (See Figure 1-20)

Figure 1-20

Provider Service Staff on Multiple Services

ServicePoint 5.7 adds the ability to display **Provider Service Staff** on multiple services screens by selecting the **Display Provider Service Staff** option in the **Multiple Services Module Settings** in **Provider Admin**.

Showing Linked Goal on Service Transactions

If a goal has been associated with a need or service, the goal classification and type are now displayed on the need and service screens. The user may also edit the goal from the need and service screens. (See Figure 1-21)

Need Goal	(Education / Enroll in Class/School)
Need Status *	Identified
Outcome of Need	-Select-
If Need is Not Met, Reason	-Select-

Figure 1-21

SKANPOINT UPDATE

Scanning Same Client More than Once

ServicePoint 5.7 adds the ability to scan a client more than one time in order to create more than one service for the client in *SkanPoint*. This is controlled by **SkanPoint Module Setting** labeled **Allow a client to be scanned in multiple times during a session**. Another important change is that now a service will be entered for a client at the time the client is scanned, whereas previously the service would be entered for all of the scanned clients at the same time at the end of the scanning session.

ART UPDATE: ENTRY EXIT REVIEW UNIVERSE DEFINITIONS

The *ServicePoint™ Advanced Reporting Tool (ART)* is a comprehensive reporting option for *ServicePoint* Users who wish to create documents that display accurate, up-to-date, information from your *ServicePoint* database. Combining the power of BusinessObjects Enterprise XI with Web Intelligence and *ServicePoint*, ART provides a powerful, flexible, and functionally advanced reporting solution. This custom report-building interface not only allows users to create custom reports, but also provides the functions needed to share them with others in their *ServicePoint* installation.

This section provides an outline of the **Entry Exit Review** universe, including definitions for the objects used to create your custom reports.

BUSINESS OBJECTS Universe DEFINITIONS

The *Advanced Reporting Tool* is separated into multiple Universes. Each of the universes is centered on a unique property. The **Entry Exit Review** universe is centered on the properties of the **Entry Exit** table. It is similar to the **Entry Exit** universe except it has a new category called **Review Objects**.

The **Entry Exit Review Universe** is sorted into the following twelve main categories:

- ❥ **Entry Exit**
  - Actionsteps
  - Casenotes
  - Clients
  - Call Records (Inner)
  - Call Records (Outer)
  - Entry Exit Reviews
  - Goals
  - Households
  - Household Relationships
  - Needs (Inner)
  - Needs (Outer)
  - Services (Inner)
  - Services (Outer)
  - Quick Calls
  - ROI (Inner)
  - ROI (Outer)
  - Infractions (Inner)
  - Infractions (Outer)

- Counts
- Review Objects
- Date Objects
- Reporting Group Filters
- Case Manager Filters

Each of these categories can contain subcategories, objects, and details. For example, the **Actionsteps** category contains detail items for each **Action Step** created in *ServicePoint*.

The objects within each category are labeled with the category or subcategory name first, followed by the title of the object.

> **Example:** The **Uid** object is listed under the **Actionsteps** category, so its title is "Actionstep Uid."

The following conventions are used within the BusinessObjects interface and maintained throughout this document:

- **Categories** (**Classes**) and **Subcategories (Subclasses)** are noted by folder icons.
- **Dimensions** are noted by blue diamonds.
- **Details** are noted by green diamonds.
- **Counts** are noted by orange rectangles.

This document will focus on the new objects added to this variation of the **Entry Exit** universe. These new objects are the **Entry Exit Reviews** and **Review Objects** categories. This document will also go over a basic explanation about how **Entry Objects** and **Exit Objects** pull in data in comparison to **Review Objects**.

A document will be released at a later date that includes information on all objects listed in this universe.

Entry Exit Reviews

The **Entry Exit Reviews** category includes six objects.

ENTRY EXIT REVIEW UID

Entry Exit Uid	Entry Exit Review Uid
284	2
285	6

❧ **Function:** For each **Entry Exit Interim** or **Follow-up** created in *ServicePoint*, a system generated numeric value that identifies that **Entry Exit** "Review" is also created for that row in the database. A single **Entry Exit** can have none or multiple review Uids but each **Entry Exit** Review Uid is linked to only one Entry Exit Uid. This object generates a list of these Uids.

❧ **Report Results:** The report includes a list of numerical **Entry Exit Review** Uids.

ENTRY EXIT REVIEW INACTIVE

Entry Exit Uid	Entry Exit Review Uid	Entry Exit Review Inactive
284	2	No
285	6	No

❧ **Function**: Indicates whether or not an **Entry Exit Review** is active.

❧ **Report Result**: The report results will either be a **Yes** or a **No**. A **Yes** indicates that the **Entry Exit Review** is Inactive, while a **No** indicates that the **Entry Exit Review** is Active.

ENTRY EXIT REVIEW POINT IN TIME TYPE

Entry Exit Uid	Entry Exit Review Uid	Entry Exit Review Point in Time Type
284	2	Interim Review
285	7	Follow Up Review

❧ **Function**: Indicates the type of **Entry Exit Review**.

❧ **Report Result**: The currently available options are **Interim** or **Follow-up**. Interim reviews are recorded between the **Entry Exit** entry date and the **Entry Exit** exit date. **Follow-up** reviews are recorded after the **Entry Exit** exit date.

ENTRY EXIT REVIEW TYPE

Entry Exit Uid	Entry Exit Review Uid	Entry Exit Review Type
284	2	90-Day Review
285	7	120-Day Review

- ◆ **Function**: Indicates the timeframe from the **Entry Exit**.

- ◆ **Report Result**: This will indicate the amount of time between the **Entry Exit** and the **Entry Exit** review. For **Interim** reviews this is based upon the entry/exit entry date and for **Follow-up** reviews this is based upon the **Entry Exit** exit date.

ENTRY EXIT REVIEW DATE

Entry Exit Uid	Entry Exit Review Uid	Entry Exit Review Date
284	2	10/3/2011 5:33:01 PM
285	7	1/2/2012 5:42:43 PM

- ◆ **Function**: Generates a list of dates used for E**ntry Exit** reviews in *ServicePoint.*

- ◆ **Report Results:** The report includes a list of dates used for **Entry Exit** reviews in mm/dd/yyyy hh:mm:ss am/pm format.

ENTRY EXIT REVIEW SUBGROUP ID

Entry Exit Uid	Entry Exit Review Uid	Entry Exit Review Subgroup Id
284	2	
285	7	

- ◆ **Function:** Generates a list of **Entry Exit** review subgroup Ids for clients in households. If the client is not linked to a household in the **Entry Exit** then this will show no data. Clients of the same household who enter a program at the same time are assigned the same **Entry** subgroup Id. If other members of the household enter the program at a different date, then they are assigned a different **Entry Exit** subgroup ID.

- ◆ **Report Results:** The report includes a list of numerical E**ntry Exit** review subgroup IDs.

Entry Exit Reviews Audit

The **Entry Exit Reviews Audit** subcategory includes **Entry Exit** reviews audit information related to the **Entry Exit** reviews.

▟ ENTRY EXIT REVIEW DATE ADDED

Entry Exit Review Uid	Entry Exit Review Date Added	Entry Exit Review Date Updated
2	3/28/2012 5:33:17 PM	3/28/2012 5:33:17 PM
7	3/28/2012 6:43:17 PM	3/28/2012 6:43:17 PM

- ◆ **Function**: Generates a list of dates on which **Entry Exit Reviews** were added in *ServicePoint*.
- ◆ **Report Results**: The report includes a list of dates on which **Entry Exit Reviews** were added in mm/dd/yyyy hh:mm:ss am/pm format.

▟ ENTRY EXIT REVIEW DATE UPDATED

Entry Exit Review Uid	Entry Exit Review Date Added	Entry Exit Review Date Updated
2	3/28/2012 5:33:17 PM	3/28/2012 5:33:17 PM
7	3/28/2012 6:43:17 PM	3/28/2012 6:43:17 PM

- ◆ **Function**: Generates a list of dates on which **Entry Exit Reviews** were updated in *ServicePoint*.
- ◆ **Report Results**: The report includes a list of dates on which **Entry Exit Reviews** were updated in mm/dd/yyyy hh:mm:ss am/pm format.

ENTRY EXIT REVIEW PROVIDER CREATING

Entry Exit Review Uid	Entry Exit Review Provider Creating	Entry Exit Review Provider Creating ID	Entry Exit Review Provider Creating Name
2	Bowman Systems, LLC(0)	0	Bowman Systems, LLC
7	Bowman Systems, LLC(0)	0	Bowman Systems, LLC

➤ **Function**: Generates a list of providers that created **Entry Exit Reviews** in *ServicePoint*.

➤ **Report Results**: The report includes a list of provider names and ids.

The Entry Exit Review Provider Creating object has 2 identifying details.

ENTRY EXIT REVIEW PROVIDER CREATING ID

Entry Exit Review Uid	Entry Exit Review Provider Creating	Entry Exit Review Provider Creating ID	Entry Exit Review Provider Creating Name
2	Bowman Systems, LLC(0)	0	Bowman Systems, LLC
7	Bowman Systems, LLC(0)	0	Bowman Systems, LLC

➤ **Function**: Generates a list of provider IDs that created **Entry Exit Reviews** in *ServicePoint*.

➤ **Report Results**: The report includes a list of provider ids.

ENTRY EXIT REVIEW PROVIDER CREATING NAME

Entry Exit Review Uid	Entry Exit Review Provider Creating	Entry Exit Review Provider Creating ID	Entry Exit Review Provider Creating Name
2	Bowman Systems, LLC(0)	0	Bowman Systems, LLC
7	Bowman Systems, LLC(0)	0	Bowman Systems, LLC

➤ **Function**: Generates a list of provider names that created **Entry Exit Reviews** in *ServicePoint*.

➤ **Report Results**: The report includes a list of provider names.

ENTRY EXIT REVIEW PROVIDER UPDATING

Entry Exit Review Uid	Entry Exit Review Provider Updating	Entry Exit Review Provider Updating ID	Entry Exit Review Provider Updating Name
2	Bowman Systems, LLC(0)	0	Bowman Systems, LLC
7	Bowman Systems, LLC(0)	0	Bowman Systems, LLC

- ➤ **Function**: Generates a list of provider that updated **Entry Exit Reviews** in *ServicePoint*.
- ➤ **Report Results**: The report includes a list of provider names and ids.

The Entry Exit Review Provider Updating object has 2 identifying details.

ENTRY EXIT REVIEW PROVIDER UPDATING ID

Entry Exit Review Uid	Entry Exit Review Provider Updating	Entry Exit Review Provider Updating ID	Entry Exit Review Provider Updating Name
2	Bowman Systems, LLC(0)	0	Bowman Systems, LLC
7	Bowman Systems, LLC(0)	0	Bowman Systems, LLC

- ➤ **Function**: Generates a list of provider IDs that updated **Entry Exit Reviews** in *ServicePoint*.
- ➤ **Report Results**: The report includes a list of provider ids.

ENTRY EXIT REVIEW PROVIDER UPDATING NAME

Entry Exit Review Uid	Entry Exit Review Provider Updating	Entry Exit Review Provider Updating ID	Entry Exit Review Provider Updating Name
2	Bowman Systems, LLC(0)	0	Bowman Systems, LLC
7	Bowman Systems, LLC(0)	0	Bowman Systems, LLC

- ➤ **Function**: Generates a list of provider names that updated **Entry Exit Reviews** in *ServicePoint*.
- ➤ **Report Results**: The report includes a list of provider names.

ENTRY EXIT REVIEW USER CREATING

Entry Exit Review Uid	Entry Exit Review User Creating	Entry Exit Review User Creating ID	Entry Exit Review User Creating Name
2	Sarah Graham(46)	46	Sarah Graham
7	Sarah Graham(46)	46	Sarah Graham

- ➤ **Function**: Indicates which user created the **Entry Exit Reviews** in *ServicePoint*.
- ➤ **Report Results:** The report results will show the user that created the **Entry Exit Review**.

The Entry Exit Review User Creating object has 2 identifying details.

ENTRY EXIT REVIEW USER CREATING ID

Entry Exit Review Uid	Entry Exit Review User Creating	Entry Exit Review User Creating ID	Entry Exit Review User Creating Name
2	Sarah Graham(46)	46	Sarah Graham
7	Sarah Graham(46)	46	Sarah Graham

- ➤ **Function**: Generates a list of user IDs that created **Entry Exit Reviews** in *ServicePoint*.
- ➤ **Report Results**: The report includes a list of user IDs.

ENTRY EXIT REVIEW USER CREATING NAME

Entry Exit Review Uid	Entry Exit Review User Creating	Entry Exit Review User Creating ID	Entry Exit Review User Creating Name
2	Sarah Graham(46)	46	Sarah Graham
7	Sarah Graham(46)	46	Sarah Graham

- ➤ **Function**: Generates a list of user names that created **Entry Exit Reviews** in *ServicePoint*.
- ➤ **Report Results**: The report includes a list of user names.

ENTRY EXIT REVIEW USER UPDATING

Entry Exit Review Uid	Entry Exit Review User Updating	Entry Exit Review User Updating ID	Entry Exit Review User Updating Name
2	Sarah Graham(46)	46	Sarah Graham
7	Sarah Graham(46)	46	Sarah Graham

- ❖ **Function**: Indicates which user updated the **Entry Exit Reviews** in *ServicePoint*.
- ❖ **Report Results:** The report results will show the user that updated the **Entry Exit Review**.

The Entry Exit Review User Updating object has 2 identifying details.

ENTRY EXIT REVIEW USER UPDATING ID

Entry Exit Review Uid	Entry Exit Review User Updating	Entry Exit Review User Updating ID	Entry Exit Review User Updating Name
2	Sarah Graham(46)	46	Sarah Graham
7	Sarah Graham(46)	46	Sarah Graham

- ❖ **Function**: Generates a list of user IDs that updated **Entry Exit Reviews** in *ServicePoint*.
- ❖ **Report Results**: The report includes a list of user IDs.

ENTRY EXIT REVIEW USER UPDATING NAME

Entry Exit Review Uid	Entry Exit Review User Updating	Entry Exit Review User Updating ID	Entry Exit Review User Updating Name
2	Sarah Graham(46)	46	Sarah Graham
7	Sarah Graham(46)	46	Sarah Graham

- ❖ **Function**: Generates a list of user names that updated **Entry Exit Reviews** in *ServicePoint*.
- ❖ **Report Results**: The report includes a list of user names.

Entry, Exit, and Review Objects

Entry Objects and Exit Objects can be accessed in the "entry_exit_u". Review Objects can be accessed in the "entry_exit_review_u". These can be combined together in a report utilizing merged dimensions.

Entry Objects are considered effective if:

Assessment value was entered before the date of **Entry** into the program.

Assessment value was entered on the date of **Entry** into the program.

Subassessment value has a start date less than or equal to the date of **Entry** into the program and an end date that is greater than or equal to the date of **Entry** into the program.

Subassessment value has a start date less than or equal to the date of **Entry** into the program and has no end date.

Exit Objects are considered effective if:

Assessment value was entered before the date of **Exit** from the program.

Assessment value was entered on the date of **Exit** from the program.

Subassessment value has a start date less than or equal to the date of **Exit** of the program and an end date that is greater than or equal to the date of **Exit** of the program.

Subassessment value has a start date less than or equal to the date of **Exit** of the program and has no end date.

Review Objects are considered effective if:

Assessment value was entered on or before the date of review for the client.

Subassessment value has a start date less than or equal to the date of review and an end date that is greater than or equal to the date of review.

Subassessment value has a start date less than or equal to the date of review and has no end date.