



Project Updates

Managing Projects

How to update project records

Keeping your project records updated in WSCS is essential. Some projects will require regular reviews or updates, as enrolled clients keep receiving services. Other projects will require annual reviews.




Perform record updates

1 Search for the client record

Search for a client that requires an interim review. Then, go to the *Entry/Exit tab* of the client's record.

2 Add Interim Review

From the *Entry/Exit tab*, view the *Program History list*. Then, locate the *Interim* section and select the page  icon.

Choose the *Interim Review Type*. For updates on the record, select *Update*. For records dated a year longer or more, choose *Annual Assessment*.

3 Interim Review Assessment

At the top of this pop-up screen, you will see summary information. Further down is an interim review assessment, which must be completed.

This assessment is similar to the Project Entry assessment.

When to perform project updates?

- ✓ Regular updates are necessary for projects in WSCS, performed through **interim reviews**.
- ✓ Other projects will need an annual update if a client has been enrolled in a program for over a year, even if no information has changed. This is called **Annual Assessment**.

About Annual Assessments

- ✓ Annual Assessments are only for clients enrolled in programs for a year or longer.
- ✓ Annual Assessments must be dated **within 30 days** (before or after) the client's project entry anniversary.
- ✓ Assessments may vary based on project type and agency-specific data collection and reporting needs.
- ✓ To update a record that requires an annual assessment, follow the same steps as in interim reviews.