



Coalition on Homelessness  
and Housing in Ohio  
**COHHIO**

## Interim Reviews for Income Changes

1. The information at Project Start/Entry is only about what the client's income looked like the day they entered the project. Never go back into the Project Start/Entry pencil to make any changes to income after their first day, you must create an Interim Review for any changes after the first day. You should only go back to the Project Start/Entry pencil to correct or complete something was incorrect or missing about the income related to their first day.

Effectively, Interim Reviews allow you to create a pencil with a date you need to record an event occurred for the client, in this case, income changes.

2. When making income changes using Interim Reviews, set the date of the Interim to the date you found out about any changes and make the End Date and Start Dates changes to income sub-assessments based upon that date, not the actual dates when the event occurred for a client.

For example: If you are PSH and you meet with your client once a year and find out that the client had an income change 5 months ago, but just talked to them yesterday and learned about the change, make the Interim Review date yesterday and align the changes based upon yesterday. If you find out about changes at Exit, don't make an Interim Review, just Exit the client and make the changes through the Exit Assessment, aligning everything around the Exit Date.

3. There are only three things you should change in an income update. The 'Outside' Y/N, the Total Monthly Income (TMI), and adding an End Date to the inside of the income sub-assessment that is changing. You then create a new income sub-assessment record for that income source with the new information (a new Inside Amount, and a new Start Date). When you End Date an old income sub-assessment do not change the Inside Amount or change the Inside Yes/No, leave those exactly as they were and only put in an End Date.

- "Income from Any Source" (Yes/No) -- 'Outside Yes/No'
- "Total Monthly Income" (\$ amount) -- 'TMI'
- "Monthly Income" (sub-assessment) -- 'income sub-assessment' including Monthly Amount ('Inside Amount') and Receiving Income Source ('Inside Yes/No')

Monthly Amount	Source of Income	Receiving Income Source?	Start Date *	End Date
	SSI (HUD)	No	04/01/2018	
	Private Disability Insurance (HUD)	No	04/01/2018	
US\$355.00	SSDI (HUD)	Yes	04/01/2018	
	Retirement Income From Social Security (HUD)	No	04/01/2018	
	Earned Income (HUD)	No	04/01/2018	

4. When you are ending an old income sub-assessment record to replace it with the new income sub-assessment, you set the End Date to be the day before the event (Interim Review Date or Exit Date), and the new income sub-assessment record you create with have its Start Date be the date of the event



Coalition on Homelessness  
and Housing in Ohio  
**COHHIO**

(Interim Review Date or Exit Date). The old record and the new record should not have the same or overlapping End Date/Start Date, if this happens it causes the income amount to spike on that day and come back down the next day, which will have a negative effect on your outcomes.

### **In summary**

- Interim Reviews are for changes that occur after the Project Start/Entry Date
- Set the Interim date to the date you found out about the change
- When ending an income sub-assessment only input an End Date, leave all the other answers exactly as they were
- Any income ending should have an End Date of the day before the Interim date, and the new income should have a Start Date that matches the Interim Date
- If you are finding out about changes at Exit use the Exit Assessment instead of an Interim but then use the day before exit as the End Date for an income and the Exit Date as the Start Date for new incomes

## **Income Update Examples**

Whether you are updating income through an Interim Review, or an Exit Assessment you will need to review the Income for each adult in the household (including a child's SSI/SSDI/Child Support that is being recorded on the appropriate adult) and record the new income data using the examples below:

### ***Client had no income but is updating with income***

If the client had no income previously and now has income:

- ✓ Income from Any Source: Switch from No to Yes
- ✓ Total Monthly Income: Delete 0 and input the new monthly income total
- ✓ Monthly Income (sub-assessment):
  - a) Click HUD Verification to open the income sub-assessments
  - b) Click the pencil (✎) next to the income that will be changing from No to Yes
  - c) Enter an End Date (the day before the Interim or Exit, accordingly)
  - d) Click Save
  - e) Select Yes for the Income that has moved to Incomplete
  - f) Enter the dollar amount
  - g) Click Save
  - h) Click Exit to close HUD Verification
  - i) Click Save & Exit to close the Interim

### ***Client had income but now has no income***

If the client had income previously and is no longer receiving any income:

- ✓ Income from Any Source: Switch from Yes to No



Coalition on Homelessness  
and Housing in Ohio  
**COHHIO**

- ✓ Total Monthly Income: Delete dollar amount and replace with 0
- ✓ Monthly Income (sub-assessment):
  - a) Click HUD Verification to open the income sub-assessments
  - b) Click the pencil (✎) next to the income that will be changing from Yes to No
  - c) Enter an End Date (the day before the Interim or Exit, accordingly)
  - d) Click Save
  - e) Select No for the Income that has moved to Incomplete
  - f) Click Save & Exit to close HUD Verification
  - g) Click Save & Exit to close the Interim

***Client has income and now has different income (change in amount and/or source)***

These examples for are a client who already has some income but has had a change either to the amount of income from a single source, or they have multiple income sources and one has changed but the other remain:

*When one income source ends but other income sources still remain*

- ✓ Income from Any Source? Keep Yes
- ✓ Total Monthly Income: delete existing amount and enter new monthly income total
- ✓ Monthly Income (sub-assessment):
  - a) Click HUD Verification to open the income sub-assessments
  - b) Click the pencil (✎) next to the income that will be changing from Yes to No
  - c) Enter an End Date (the day before the Interim or Exit, accordingly)
  - d) Click Save
  - e) Select No for the Income that has moved to Incomplete
  - f) Click Save & Exit to close HUD Verification
  - g) Click Save & Exit to close the Interim

*When an existing income source changes amount*

For example: Client has a part-time job and gets a 2<sup>nd</sup> part time job. You update the Total Monthly Income, then end date the existing Earned Income sub-assessment and replace it with a new Earned Income sub-assessment

- ✓ Income from Any Source? Keep Yes
- ✓ Total Monthly Income: delete existing amount and enter new monthly income total
- ✓ Monthly Income (sub-assessment):
  - a) Click HUD Verification to open the income sub-assessments
  - b) Click the pencil (✎) next to the income that will be changing amounts
  - c) Enter an End Date (the day before the Interim or Exit, accordingly)
  - d) Click Save
  - e) Select Yes for the Income that has moved to Incomplete
  - f) Enter the new dollar amount
  - g) Click Save



Coalition on Homelessness  
and Housing in Ohio  
**COHHIO**

- h) Click Exit to close HUD Verification
- i) Click Save & Exit to close the Interim

*When a new income source is gained and there are other incomes that are continuing*

- ✓ Income from Any Source? Keep Yes
- ✓ Total Monthly Income: delete existing amount and enter new monthly income total
- ✓ Monthly Income (sub-assessment):
  - a) Click HUD Verification to open the income sub-assessments
  - b) Click the pencil (✎) next to the income that will be changing from No to Yes
  - c) Enter an End Date (the day before the Interim or Exit, accordingly)
  - d) Click Save
  - e) Select Yes for the Income that has moved to Incomplete
  - f) Enter the new dollar amount
  - g) Click Save
  - h) Click Exit to close HUD Verification
  - i) Click Save & Exit to close the Interim

***Client has no changes to income***

These last two examples might happen if you are a PSH program doing an Annual Assessment and there are no changes to income. You have to create an Interim Review set as Annual Assessment but may not have anything to change. If you aren't a PSH or TH with clients staying over 365 days needing re-certification, you won't create Interim Reviews when there are no changes.

These might also be the case for any client at Exit who had no income and leaves with no Income, or has some income recorded that doesn't change as they exit.

*Client had no income and is at review still has no income*

If the client has no reported income and they still have no income then you do not need to change any of the Income questions. The income questions should be:

- ✓ Income from Any Source: Keep No
- ✓ Total Monthly Income: Keep 0
- ✓ Monthly Income (sub-assessment): Keep existing sub-assessments

*Client has income and is maintaining the same income (no change in amount or source)*

If the client had income previously and is maintaining the same Income from the same source(s) then you do not need to change anything on the income.

- ✓ Income from Any Source: Keep Yes
- ✓ Total Monthly Income: Keep dollar amount
- ✓ Monthly Income (sub-assessment): Keep existing sub-assessments