



**USER BULLETIN: UPDATING INCOME USING INTERIM REVIEWS**  
**14-October-13**

This User Bulletin will explain how to access interim reviews and how to update income and non-cash benefits.

Interim reviews will now be used to show that staff have reviewed the client(s) income and non-cash benefits at least once annually **as required by HUD.**

**INTERIM REVIEWS:**

An interim review includes assessment data and a review date that falls between the **Entry** date and the **Exit** date. Each type of review may include a client and household members who have been included in the **Entry/Exit** record. Each client may have any number of interim reviews associated with a given **Entry/Exit** record. Using an **Entry/Exit** interim 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.

**HOW TO ADD AN INTERIM REVIEW:**

Interim reviews may be added or edited by clicking the icons in the **Interims** column that has been added to the **Entry/Exit** tabs in *ClientPoint*. (See Figure 1-1)

Program	Type	Entry Date	Exit Date	Interims	Follow Up	Client Count
Bowman Systems, LLC (0)	Basic	03/28/2012		[Icon]	[Icon]	1
Bowman Systems, LLC (0)	Basic	02/03/2012		[Icon]	[Icon]	1
Bowman Systems, LLC (0)	Basic	10/11/2010		[Icon]	[Icon]	1
Bowman Help Center (3038)	Basic	01/20/2009		[Icon]	[Icon]	2
Bowman Help Center (3038)	Basic	01/20/2009		[Icon]	[Icon]	1
Bowman Systems, LLC (0)	Basic	08/22/2007		[Icon]	[Icon]	1
Bowman Systems, LLC (0)	Basic	03/06/2007		[Icon]	[Icon]	2
Bowman Systems, LLC (0)	Basic	02/08/2007		[Icon]	[Icon]	1

(Figure 1-1)

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** column also displays the number of existing interim reviews. (See Figure 1-2)

Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
04/16/2012	30-Day Review	1

Add Interim Review

Showing 1-1 of 1

Exit

(Figure 1-2)

After clicking the **Add Interim Review** button as indicated by the red arrow in Figure 1-2, a new popup window will appear in which the user will select household members to include in the review, set the **Interim Review Type**, respectively, and the **Review Date**. (See Figure 1-3)

Add Interim Review - (80964) Adamas, John

Household Members

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

(80964) Adamas, John (Entry Date: 03/29/2012 3:06 PM)

(80965) Banks, James (Entry Date: 03/29/2012 3:06 PM)

(80978) Banks, Jeanne (Entry Date: 03/29/2012 3:06 PM)

Interim Review Data

Entry / Exit Provider: Bowman Systems, LLC (0)

Entry / Exit Type: Standard

Interim Review Type: -Select-

Review Date: 05/29/2012 10:16 PM

Save & Continue Cancel

(Figure 1-3)

In an interim review, all household members who were included in the **Entry/Exit** record 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.\*\*\*** See figure 1-3.

After selecting the household members to include, the **Interim Review Type** and the **Review Date**, click the **Save & Continue** button to access the review assessment section. (See Figure 1-4)

Entry / Exit Interim Review

Interim Review Data

Entry / Exit Provider: Bowman Systems, LLC (0)

Entry / Exit Type: Standard

Interim Review Type: 60-Day Review

Review Date: 05/29/2012 03:07:38 PM

Interim Review Assessment

Select an Assessment

Additional Profile Information

Employment

CallPoint Profile

HPRP

Medical

Household Members

(80964) Adamas, John Age: 35

(80965) Banks, James Age: 29

(80978) Banks, Jeanne Age: 29

Medical

Interim Review Date: 05/29/2012 03:07:38 PM

Has Medical Insurance? -Select- 0

Health Condition Compared to People of Your Age -Select- 0

Current Health care providers

Hospitals/Clinics

Facility Name	Facility Address	Facility Phone Number
Add		

Physician Information

(Figure 1-4)

**UPDATE INCOME And NON CASH BENEFITS:**

You will need to use interim reviews any date after you have created an entry to verify that you have reviewed income and non-cash benefits **at least once annually as required by HUD.** Figure 1-5 illustrates the questions you will need to review as indicated by the arrows.

Income received from any source in past 30 days?  Yes (HUD)

Monthly Income			
	Last 30 Day Income	Source of Income	Start Date
	US\$130.00	TANF (HUD)	08/06/2013
	US\$50,000.00	Contributions From Other People	11/29/2012
	US\$100.00	Earned Income (HUD)	11/29/2012
	US\$59.00	Interest (Bank)	07/25/2012
	US\$58.00	Alimony	07/25/2012

Add View Gross Income Show

% of county median income: -Select-

Non-cash benefit received in past 30 days?  Yes (HUD)

Non-Cash Benefits		
	Source of Non-Cash Benefit	Start Date *
	Temporary rental assistance (HUD)	11/29/2012
	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	11/29/2012
	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	12/15/2011

Add Show

(Figure 1-5)

To record that you have reviewed the income and non-cash benefits you will need to create an interim with the review date (see figure 1-2).

Next you will:

(1) Close out any income and non-cash benefits that are no longer valid by putting an end date on the income/non-cash benefits and saving changes. (see circled info in figure 1-6). *If your agency did not enter the income/non-cash benefits and you and/or you and another agency are simultaneously serving the client, it is recommended that you contact the agency and case worker to verify the income/non-cash benefits and coordinate to input the most accurate, current income/non-cash benefits. (You can hover over the box next to each field to see who originally entered the information, as indicated by the arrows in figure 1-6)*

Edit Recordset - (24092) McTest, Testy

Monthly Income	
Last 30 Day Income	130
Source of Income	TANF (HUD)
If Other, Please Specify	
Receiving Income Source?	Yes
Start Date *	08 / 06 / 2013
End Date	/ /

Print Recordset Save Save and Add Another Cancel

(Figure 1-6)

(2) Add any new income and non-cash benefits.

(3) In the case where there has been no income or non-cash benefits change, you must still verify income and non-cash benefits. You can do this by simply saving the interim without making changes. **On HUD APR reports this will be important to do in order to show that a “stayer” has had no change in income (i.e. maintained their income).**

(4) Click “Save” and exit from the screen.

You have now successfully verified the income and non-cash benefits.

You can access this training document by visiting:  
<https://knoxhmis.sworps.tennessee.edu/documents/training-documents/>