INTERIM REVIEWS

The Interim Review is an annual update of a client's income, benefits, and disability status. Interim Reviews are required for **each household member** even if there have been no status changes. Multnomah County programs that require Interim Reviews include:

- HUD Family Futures
- HUD Homesafe
- HUD Horizons

- HUD Pathways Mental Health
- HUD Pathways
- New Doors

- Action for Prosperity FUP (AFP FUP)
- Girls Transitional Housing

(*See city guidelines for submitting Interims for city-funded programs.)

Effective July 1, 2014: Interim Reviews must be submitted on each anniversary of all client's entry date in the programs listed on pg. 1 plus or minus (±) 30 days*

*If a client is enrolled in multiple HUD programs, an Interim Review is required for **each HUD program entry.**

SETTING UP AN INTERIM REVIEW
The Interim Review can be found in the Entry/Exit Tab under 'Interims'

❶ Click the Interims icon belonging to the program entry that requires an Interim Review
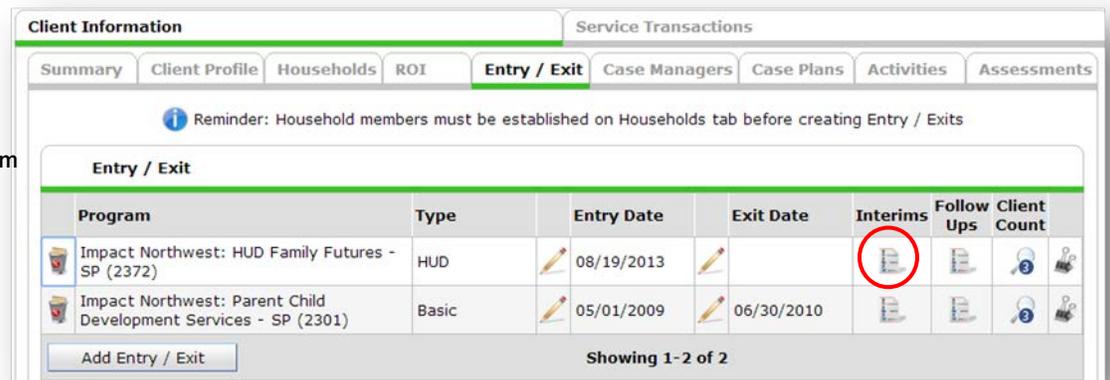
❷ Click 'Add Interim Review'
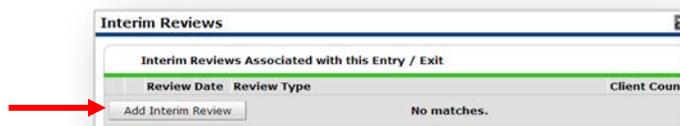
❸ Be sure that all household members are checked off

❹ Interim Review Type = 'Annual Assessment'

❺ Review Date = Date the Interim Review was completed (should be within 30 days before or after the anniversary of program entry)

❻ Click 'Save and Continue'
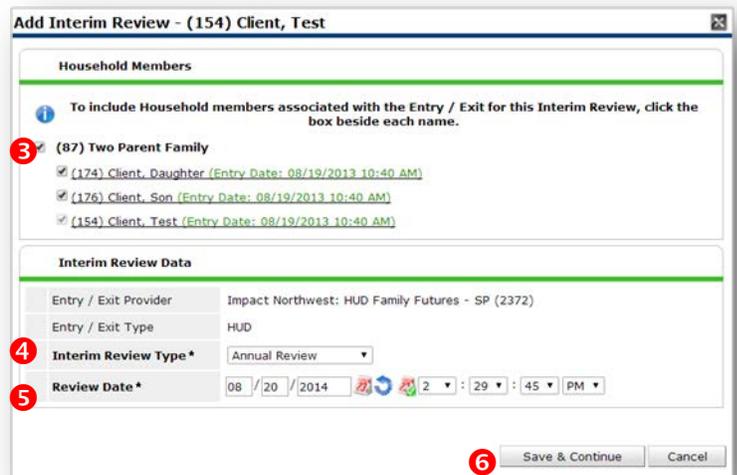
COMPLETING AN ANNUAL ASSESSMENT

Assessment Updates (Formerly known as the RARE)

❼ Verify that **Income** responses are still accurate as of the Interim Review date. (See all areas in purple.) If not, update responses.

| Income from Any Source | Yes (HUD) | G |

Monthly Income   HUD Verification ✅

	Start Date *	Source of Income	Receiving Income Source?	Monthly Amount	End Date
✏🗑	06/12/2015	Earned Income (HUD)	No		
✏🗑	06/01/2015	Earned Income (HUD)	Yes	US$1,000.00	06/10/2015
✏	05/29/2015	General Assistance (HUD)	No		
✏🗑	11/28/2014	Earned Income (HUD)	Yes	US$200.00	12/03/2014
✏🗑	11/28/2014	Worker's Compensation (HUD)	No		

| Add | View Gross Income | | Showing 1-5 of 19 | First | Previous | Next | Last |

| Total Monthly Income | 1200 | G |

❽ Verify that responses to **Non-Cash Benefits** questions are still accurate as of the Interim Review date. (See all areas in blue.) If not, update responses.

| Non-cash benefit from any source | No (HUD) | G |

Non-Cash Benefits   HUD Verification ✅

	Start Date *	Source of Non-Cash Benefit	Receiving Benefit?	Amount of Non-Cash Benefit	End Date
✏	12/06/2014	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	Yes		
✏	12/05/2014	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	No		12/06/2014
✏	12/01/2014	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	Yes		12/04/2014
✏🗑	11/28/2014	Temporary rental assistance (HUD)	No		
✏🗑	11/28/2014	Other Source (HUD)	No		

| Add | | Showing 1-5 of 11 | First | Previous | Next | Last |

❾ Verify that responses to **Health Insurance** questions are still accurate as of the Interim Review date (See all areas in green). If not, update responses.

| Covered by Health Insurance | Yes (HUD) | G |

Health Insurance   HUD Verification ⚠️

	Start Date *	Health Insurance Type	Covered?	End Date
✏	12/05/2014	MEDICARE	Yes	

| Add | | Showing 1-1 of 1 |

❿ Verify that **Disability** responses are still accurate as of the Interim Review date. (See all areas in orange.) If not, update.

Remember to also check the **Level of Family Income** question. Hover over the question to see HHS guidelines.

| Does the client have a disabling condition? | Yes (HUD) | G |

Disabilities   HUD Verification ✅

	Disability Type	Start Date *	End Date	Disability determination
✏	Developmental (HUD)	07/02/2015		No (HUD)
✏	Developmental (HUD)	06/25/2015	06/27/2015	
✏	Chronic Health Condition (HUD)	06/25/2015		No (HUD)
✏	HIV/AIDS (HUD)	06/25/2015		No (HUD)
✏	Physical (HUD)	06/25/2015		No (HUD)

| Add | | Showing 1-5 of 17 | First | Previous | Next | Last |

Relationship to Head of Household	Self (head of household)	G
In Permanent Housing	Yes	G
If yes, Date of Move-In	09 / 30 / 2014	G

IGNORE EVERYTHING ELSE BELOW THE ITEMS SHOWN IN THE ORANGE BOX

◎ **SAVE and REPEAT steps 7-10 for all household members**

Interim Review Assessment

Household Members

✅ (1) Test, Justin A
Age: 50
Veteran: Yes (HUD)

(58100) Test, Just A, Jr
Age: 23
Veteran: No (HUD)

Revised 8.21.14