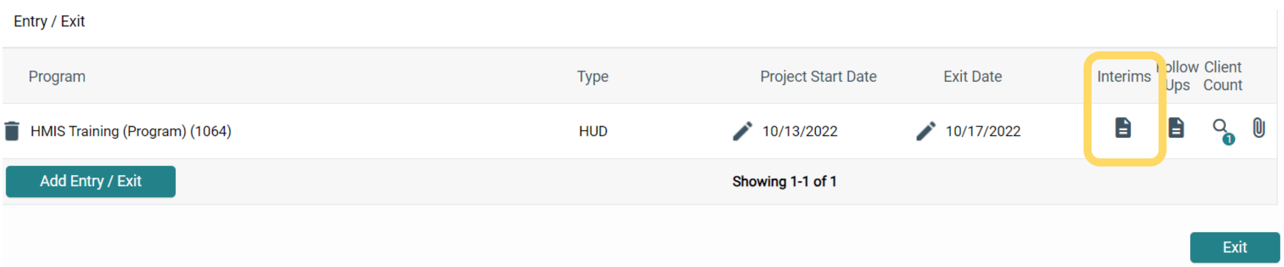
INTERIMS

Interims are any type of update to the client's information as it occurs after the Project Start Date. Interims can be done at any time. At a minimum, clients are required to have an Interim recorded on each first anniversary of their Project Start Date. The Interims columns will display the number of existing interims.

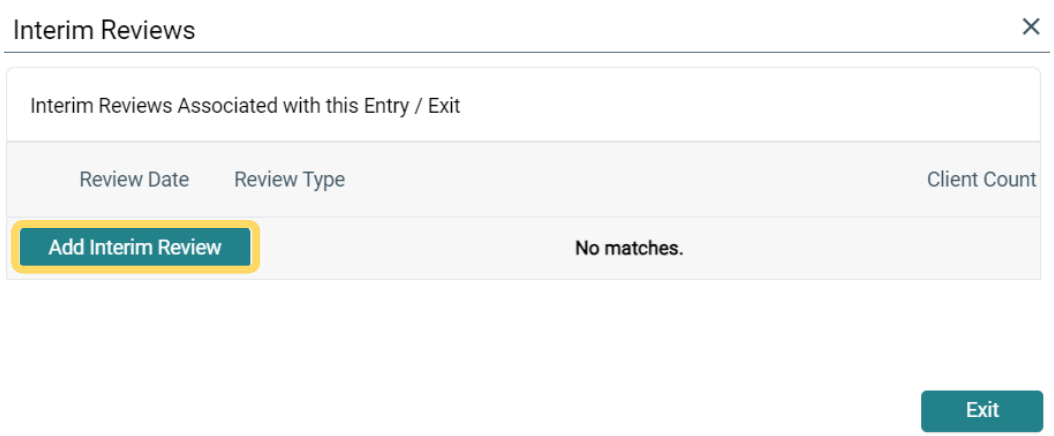
Annual Assessment - must be completed for clients in your program a year or more. +/- 30 days of the entry date.
Updates – are general non-time specific

ADDIN AN INTERIM

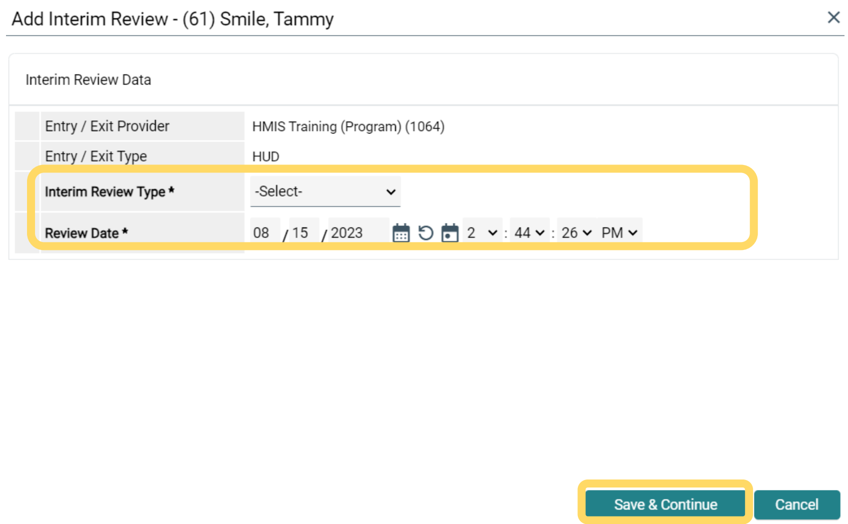
While viewing the **Entry/Exit** tab, locate the applicable **Entry/Exit** record. Click the **Interims** icon on that record line.



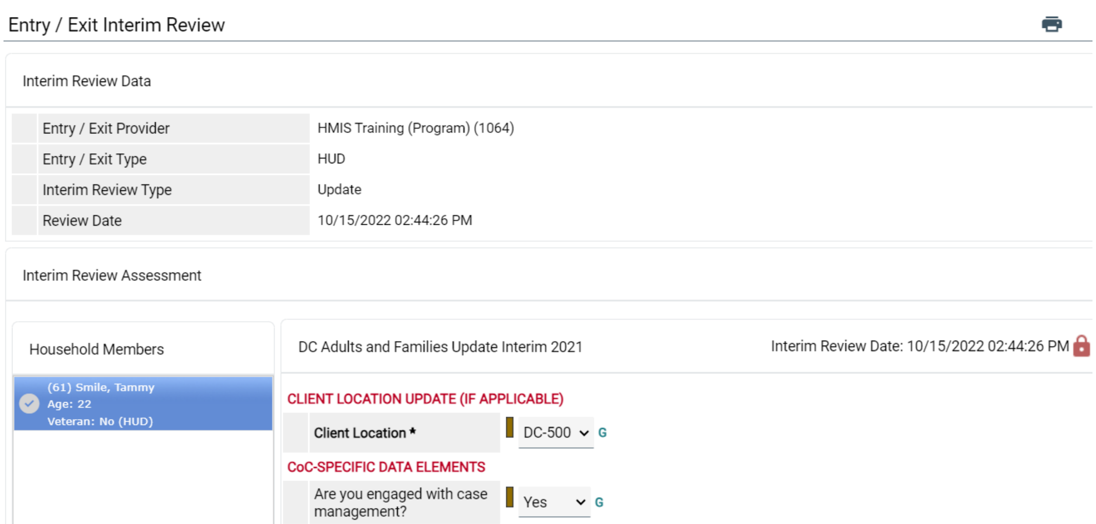
The **Interim Reviews** box will be displayed. From here, you can view or add additional interims. Click the *Add Interim Review* button.



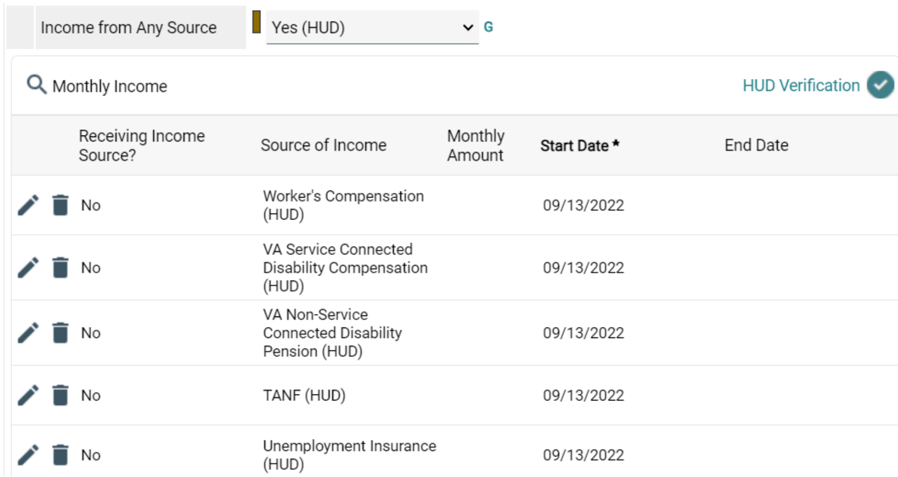
This displays the **Add Interim Review** screen. Select the applicable household members, and record the **Interim Review Type*** and **Review Date*.** Click *Save & Continue*.



The **Entry/Exit Interim Review** box will now be displayed. Scroll through the assessment to make edits to the client(s) information wherever necessary.



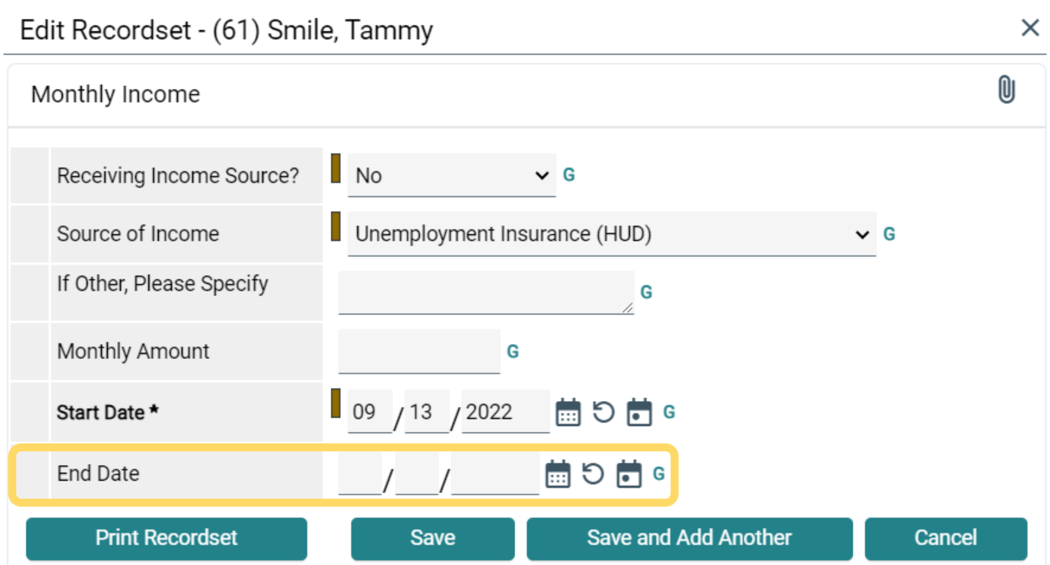
Example: If the client no longer has a source of income or if the income source has changed, scroll down to the **Monthly income** section and update the responses. Both the *Income from Any Source* section and **HUD Verification** will need to reflect the changes.

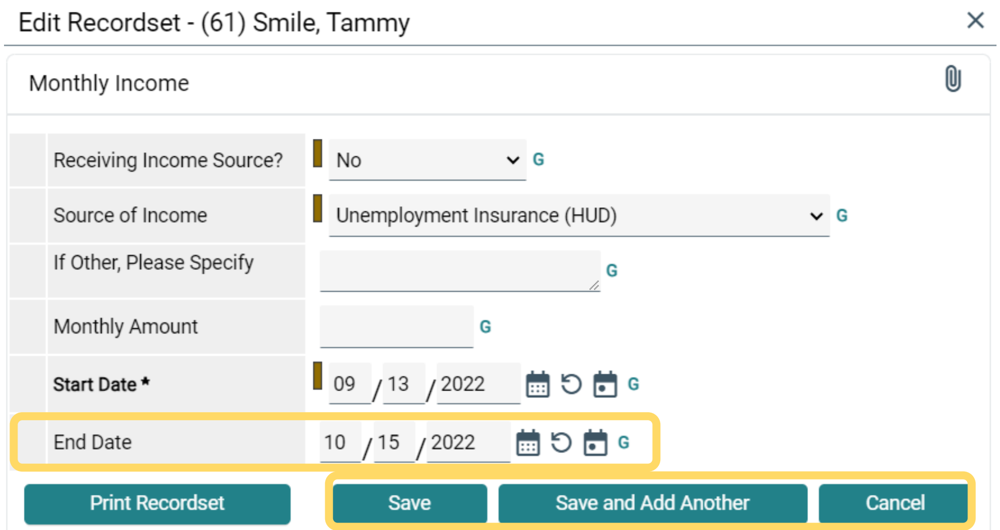


Note: Edits can include income, benefits status, and disability information but are not limited to these sections.

If the client no longer has an **Income from Any Source**, click the dropdown arrow and select *No (HUD)* as the response.

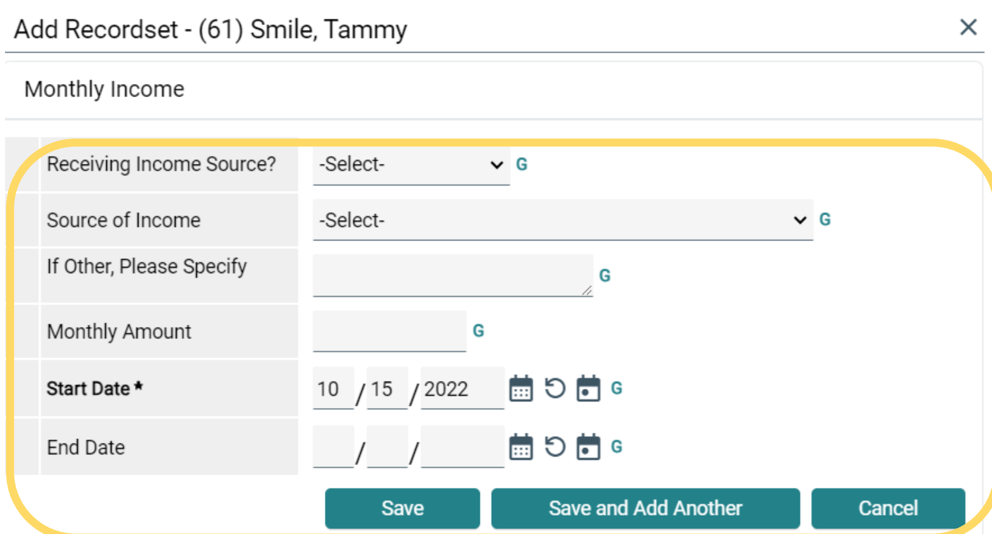
Next, click the pencil icon next to the Monthly Amount for the current source of income. The **Edit Recordset** box will be displayed. Complete the **End Date** field with a date <u>one day before</u> the current date.





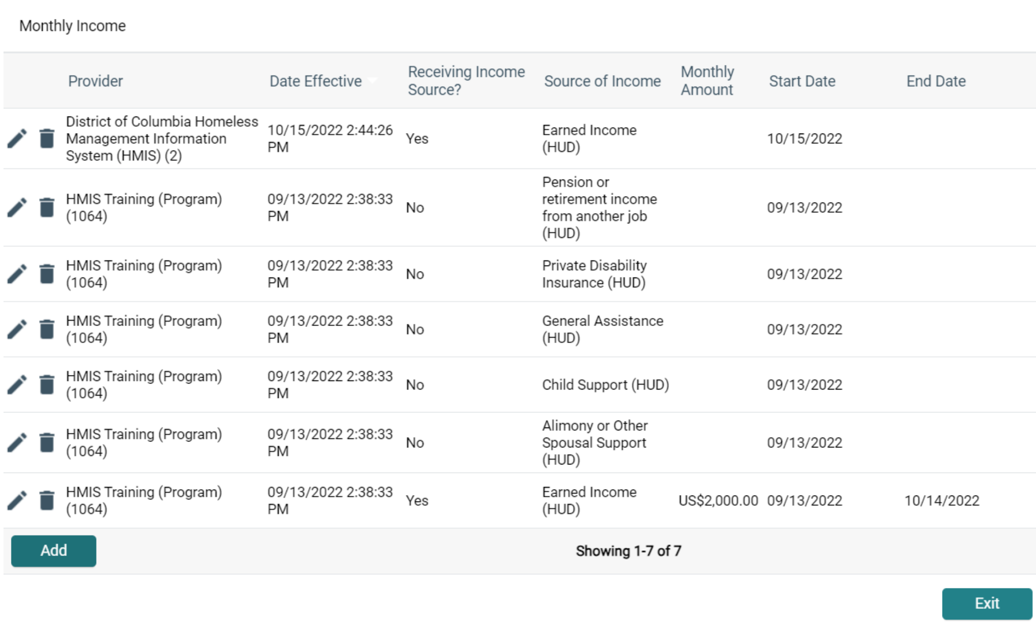
Click *Save (if there is no additional source of income)*

Click *Save and Add Another (if there is a different amount to enter of different source of income).* The **Add Recordset** box will be displayed.



Complete the **Monthly Amount**, **Source of Income,** and **Receiving Income Source** fields. Click *Save*.

Scroll through the Monthly Income options by using the *First, Previous, Next,* and *Last* buttons to view all the updated information.



Monthly Income

	Provider	Date Effective	Receiving Income Source?	Source of Income	Monthly Amount	Start Date	End Date
	District of Columbia Homeless Management Information System (HMIS) (2)	10/15/2022 2:44:26 PM	Yes	Earned Income (HUD)		10/15/2022	
	HMIS Training (Program) (1064)	09/13/2022 2:38:33 PM	No	Pension or retirement income from another job (HUD)		09/13/2022	
	HMIS Training (Program) (1064)	09/13/2022 2:38:33 PM	No	Private Disability Insurance (HUD)		09/13/2022	
	HMIS Training (Program) (1064)	09/13/2022 2:38:33 PM	No	General Assistance (HUD)		09/13/2022	
	HMIS Training (Program) (1064)	09/13/2022 2:38:33 PM	No	Child Support (HUD)		09/13/2022	
	HMIS Training (Program) (1064)	09/13/2022 2:38:33 PM	No	Alimony or Other Spousal Support (HUD)		09/13/2022	
	HMIS Training (Program) (1064)	09/13/2022 2:38:33 PM	Yes	Earned Income (HUD)	US$2,000.00	09/13/2022	10/14/2022

Add

Showing 1-7 of 7

Exit

These same steps can be used to record updates that need to be made to the **Non-Cash Benefits, Health Insurance, and Disabilities** sections.

Once all updated information has been recorded, scroll down and click *Save & Exit.*

The Interim Reviews box will be displayed. Click *Exit*

The Interims columns will display the number of existing Interim Reviews and you should notice that number has now increased by one.