

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.

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
HMIS Training (Program) (1064)	HUD	10/13/2022	10/17/2022			

[Add Entry / Exit](#) Showing 1-1 of 1

[Exit](#)

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

Interim Reviews ✕

Interim Reviews Associated with this Entry / Exit



Review Date	Review Type	Client Count
No matches.		

[Add Interim Review](#)

[Exit](#)


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

Add Interim Review - (61) Smile, Tammy X




Interim Review Data	
Entry / Exit Provider	HMIS Training (Program) (1064)
Entry / Exit Type	HUD
Interim Review Type *	-Select- ▼
Review Date *	08 / 15 / 2023   2 : 44 : 26 PM ▼

Save & Continue
Cancel

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

Entry / Exit Interim Review 

Interim Review Data	
Entry / Exit Provider	HMIS Training (Program) (1064)
Entry / Exit Type	HUD
Interim Review Type	Update
Review Date	10/15/2022 02:44:26 PM

Interim Review Assessment	
<p>Household Members</p> <ul style="list-style-type: none"> <li style="background-color: #4a86e8; color: white; padding: 5px; margin-bottom: 5px;"> (61) Smile, Tammy Age: 22 Veteran: No (HUD) 	<p>DC Adults and Families Update Interim 2021 Interim Review Date: 10/15/2022 02:44:26 PM </p> <p>CLIENT LOCATION UPDATE (IF APPLICABLE)</p> <p>Client Location * DC-500 ▼ </p> <p>CoC-SPECIFIC DATA ELEMENTS</p> <p>Are you engaged with case management? Yes ▼ </p>

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.

Income from Any Source		Yes (HUD) ▼ G		
Monthly Income				HUD Verification ✓
Receiving Income Source?	Source of Income	Monthly Amount	Start Date *	End Date
No	Worker's Compensation (HUD)		09/13/2022	
No	VA Service Connected Disability Compensation (HUD)		09/13/2022	
No	VA Non-Service Connected Disability Pension (HUD)		09/13/2022	
No	TANF (HUD)		09/13/2022	
No	Unemployment Insurance (HUD)		09/13/2022	

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 one day before the current date.

Edit Recordset - (61) Smile, Tammy ✕

Monthly Income

Receiving Income Source?	No ▼ G
Source of Income	Unemployment Insurance (HUD) ▼ G
If Other, Please Specify	<input type="text"/> G
Monthly Amount	<input type="text"/> G
Start Date *	09 / 13 / 2022 G
End Date	<input type="text"/> G

Print Recordset
Save
Save and Add Another
Cancel

Edit Recordset - (61) Smile, Tammy

Monthly Income

Receiving Income Source?	No
Source of Income	Unemployment Insurance (HUD)
If Other, Please Specify	
Monthly Amount	
Start Date *	09 / 13 / 2022
End Date	10 / 15 / 2022

Print Recordset Save Save and Add Another Cancel

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.

Add Recordset - (61) Smile, Tammy

Monthly Income

Receiving Income Source?	-Select-
Source of Income	-Select-
If Other, Please Specify	
Monthly Amount	
Start Date *	10 / 15 / 2022
End Date	/ /

Save Save and Add Another Cancel

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.