

HOTMA Resident Worksheet: Interim Reviews

This worksheet is for families who live in public housing. It goes with the HOTMA Resident Fact Sheet: Income Calculation and Reviews. There are new rules for interim reviews because of a federal law, the Housing Opportunity Through Modernization Act of 2016 (HOTMA). These changes will be effective with all rent determinations with an effective date of January 1, 2027 or after. This worksheet is not official or required by HUD or RHA.

What is an interim review?

In an interim review the PHA looks at changes in your household since your last review. The review may look at who lives with you, what you own, how much your family earns, and any costs or money that should not be included in calculating your rent. These reviews are done to make sure you remain eligible for your housing and/or might change your rent amount. You may call this a "reexamination" or a "recertification." RHA will ask you about any changes in your income and assets. However, unlike yearly reviews, they will only check the changes.

You can ask for an interim review if something changes in your family between yearly reviews. When you ask, RHA might tell you that a review is not needed. Usually, if your income changes by 10% or more, we will do an interim review.

Let's Talk About Reporting Changes

Your RHA lease tells you when you need to report changes. If you report a change, it might not always lead to an interim review.

What kinds of changes should you tell *R*HA about:

- **Household changes:** Always tell RHA management BEFORE someone moves in and after someone moves out of your home, even if they are not part of your family.
- **Income:** Report and provide verification of all changes, even small income changes. RHA will determine if a change in your rent is necessary.
- **Deductions:** Changes to your household's allowed deductions, like medical or childcare expenses, may affect your rent. The PHA will explain when you need to report these changes.

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When should you tell *R*HA about changes:

Using your online resident portal report and upload verification of all income and household changes within 10 days of the change. To get the most advance notice of the change, provide all details related to the change. Failing to report and upload verification on time can mean you lose the chance for a deduction the following month, or an advance notice of an increase, and you maybe billed retroactively.

How to Use the Worksheet

Use this worksheet to figure out if you might need an interim review what to upload to verify the change. Read the parts that match your situation. If you're not sure, talk to your property manager when something in your family changes. The sections are:

A. Family Composition Change Worksheet

B. Decrease in Income Worksheet

C. Increase in Income Worksheet

D. Change in Deductions Worksheet

Next Steps

1. If you're unsure about reporting a change or need an interim review, ask your PHA.
2. If the worksheet shows you need an interim review, report the change on time.
3. The PHA will check if an interim review is needed and, if so, do it within about 30 days.
4. The table below shows when, if needed, a rent change will take effect.

Income increase or decrease	Did you report on time?	Effective date of new rent
Decrease	Yes	1st day of the month after the event
Decrease	No	1st day of the month after the review (PHA ***may*** allow retroactive decrease)
Increase	Yes	1st day of the month after 30 days' notice
Increase	No	Retroactive to 1st day of the month after event

A. Family Composition Change Worksheet

Background *report to the Property Manager*

BEFORE someone joins or if someone leaves your household even if your annual income doesn't change. This includes additions like births, adoptions, or someone else moving in—*even if they are not a member of your family*. Also, report if someone moves out or passes away. RHA requires a background check, identification documents as well as proof of income and assets for new residents.

1. Did your family experience any of the following (check all that apply):

An addition to the household:

- ☐ Birth / adoption
- ☐ Foster child / adult
- ☐ Adult (Age 18+)
- ☐ Other dependent
- ☐ Elderly (Age 62+) / disabled family member
- ☐ Live-in aide or other non-family member

A reduction in the household:

- ☐ Family member permanently moved out
- ☐ Family member passed away

If there is a decrease in family size and your family's adjusted income ...	The PHA will ...
decreases	**always** conduct an interim review
increases	process the change, but not conduct an interim review unless it meets the threshold (usually 10%, see below for more details).

2. Gather any relevant documents for your appointment with the PHA.

- ☐ Photo identification
- ☐ Social security card
- ☐ Birth certificate
- ☐ Court order / letter for adoption or foster placement

B. Decrease in Income Worksheet

Background

RHA must do an interim review if your family's annual adjusted income decreases by 10% or more.

Remember, your family's income also decreases when someone who has income moves out or passes away.

1. How did your annual income decrease (check all that apply):

- ☐ Loss of a job
- ☐ Loss of income
- ☐ Loss of benefits
- ☐ Income earner/receiver moved out or passed away

2. What is the amount of the decrease in income?*

Source of Income	Amount before	Amount now
	$ per year	$ per year
	$ per year	$ per year
	$ per year	$ per year
TOTALS	$ 0.00	$ 0

* You will need to convert the amount you earn per paycheck into a yearly amount. If you are paid monthly, multiply your monthly amount by 12. If you are paid by the week, you can multiply the amount by 52., If you are paid semi-monthly (2 times a month) multiply the amount by 24 and if you are paid bi-weekly (every 2 weeks) multiply the amount by 26.

3. (Optional) Estimate if the change is likely to require an interim review.

If you know your previous annual adjusted income, you can use the **Income Estimation Tool** to estimate if you will need an interim review. Or use this table:

Total amount now *Sum of all amounts now*	$ 0.00
Total amount before *Sum of all amounts before*	$ 0.00
Amount of decrease *Amount now - Amount before*	$ 0.00
Amount of change as a percent *Amount of decrease / total amount before * 100*	NaN %

4. Gather any relevant documents for your appointment with the *RHA property manager*.

The documents you need will depend on your situation and will be like what you provided during your initial or yearly review.

- ☐ Most recent paystubs (the Resident Portal will instruct how many you will need.
- ☐ Letter or email from employer noting a change in pay or hours
- ☐ Letter or other notice that a (cash) benefit has stopped or been reduced
- ☐ Information about a self-employment contract that has ended or been reduced

C. Increase in Income Worksheet

Background

Under HOTMA rules, RHA will do an interim review if your income increases by 10% or more. There are some exceptions. Check what applies to your situation and gather the necessary documents.

RHA may **not** conduct an interim review after an increase in income if:

- The increased income is from **earned income.**
  - » Unless you also had a rent reduction since the last yearly review.
- Your income increased by less than 10% (adjusted annual income).
- Your next yearly review is within 3 months.

Earned income includes salaries, wages, tips, and payments for self-employment work. **Unearned income** includes earnings from benefits (like social security), investments, assets, and court-ordered payments like alimony or child support.

1. **See if the PHA will need to do an interim review:**

   Was the amount of increase in your annual adjusted income **less** than 10% since the last yearly review?

   - **Yes — STOP**. You **will not** have to do an interim review
   - **No**, it's more than 10% — **CONTINUE**

   Is your income increasing due to **unearned income**?

   - **Yes — STOP**. You **will** likely need to do an interim review
   - **No**, it's from earned income — **CONTINUE**

   Since your last yearly review, have you had an **interim review** because of a decrease in income?

   - **Yes — STOP**. You **may** need to do an interim review (depending on your PHA's rules.)
   - **No**, no previous interim — **CONTINUE**

   Is your next yearly review in the next 3 months? RHA has a rule of not doing an interim review for an increase in the last 3 months?

   - **Yes,** my PHA's policy wants me to report all changes — **STOP**. You **will not** have a rent change due to interim if the increase is during the 3 months before my annual recertification.
   - **No**, either my yearly review is more than 3 months out and/or my PHA's rules don't allow me to wait — **STOP**. You **will** likely need to do an interim review.

2. Note any changes in income your household has experienced.

What is the amount of the increase in earned income? *(An interim review is generally* ***not*** *needed for increases of earned income. Please report and RHA will determine when to count an increase in earned income (if you had a previous interim review for a decrease in income.)**

Source of Income	Amount before	Amount now
Salary / wages	$ per year	$ per year
Tips	$ per year	$ per year
Self-employment income	$ per year	$ per year
TOTALS	$ 0.00	$ 0.00

* You will need to convert the amount you earn per paycheck into a yearly amount. If you are paid monthly, multiply your monthly amount by 12. If you are paid by the week, you can multiply the amount by 52., If you are paid semi-monthly (2 times a month) multiply the amount by 24 and if you are paid bi-weekly (every 2 weeks) multiply the amount by 26.

What is the amount of the increase in unearned income?

Source of Income	Amount before	Amount now
Temporary Assistance for Needy Families (TANF)	$ per year	$ per year
Social security or disability	$ per year	$ per year
Pension	$ per year	$ per year
Child support	$ per year	$ per year
Alimony	$ per year	$ per year
Income from assets	$ per year	$ per year
Other:	$ per year	$ per year
TOTALS	$ 0.00	$ 0.00

3. (Optional) Estimate if the income increase will likely require an interim review.

An interim review will be needed for increases of 10% or more in unearned income.

If you know your previous annual adjusted income, you can use the **Income Estimation Tool** to estimate if you will need an interim review. Or use this table:

Total amount now *Sum of all unearned income now*	$ 0.00
Total amount before *Sum of all unearned income before*	$ 0.00
Amount of increase *Amount now - Amount before*	$ 0.00
Amount of change as a percent *Amount of increase / total amount before * 100*	NaN %

4. Gather any relevant documents for your appointment with the PHA.

The documents you need will depend on your situation and will be like what you brought to your initial or or yearly review.

- ☐ Most recent paystubs (your Resident Portal will advise how many)
- ☐ Letter or email from employer noting promotion or change in pay or hours
- ☐ Letter or other notice that a (cash) benefit has started or increased
- ☐ Information about self-employment work that has started or increased

D. Change in Deductions Worksheet

Check for changes in common deductions, like childcare payments or medical expenses, which can affect your rent.

1. Check for changes in common deductions

The following are common deductions. Check any areas where your family has experienced a change since your last income review and note the change.

- ☐ Dependents (See the **Family Composition Change Worksheet**)
- ☐ Elderly status
  - ☐ A Head, Spouse or Co-head of the family is now age 62
- ☐ Childcare payments for the care of children 12 years old or younger, including foster children, that allow a member of the household to work.
  - ☐ Payments started
  - ☐ Payments ended or no longer qualify for the deduction
- ☐ Unreimbursed Health and medical expenses for an elderly or disabled family member
  - ☐ Expenses began or increased
  - ☐ Expenses ended or decreased
- ☐ Unreimbursed reasonable care and equipment expenses for each member of the family with a disability, that enable any member of the family, including the person with a disability, to work.
  - ☐ Expenses began or increased
  - ☐ Expenses ended or decreased
- ☐ Student status
  - ☐ A family member started a program of higher education
  - ☐ A family member ended a program of higher education
- ☐ Disability
  - ☐ A family member now qualifies as a person with a disability
  - ☐ A family member no longer qualifies as a person with a disability

If you have a hardship that is impacting your ability to pay your rent, talk to your Property Manager about it before you fall behind on rent. There may be a deduction or exemption that can make your rent more affordable.

2. Gather any relevant documents for your appointment with the PHA.

The documents you need will depend on your situation and will be like what you brought to your first or yearly review.

- ☐ Information (including receipts or bills) for relevant payments (childcare, health and medical expenses, reasonable attendant care and auxiliary apparatus)
- ☐ Information on school enrollment and student financial aid. See the **HOTMA Resident Worksheet: Student Financial Aid**.