



Creating an Interim for Income

Many times, clients enter projects with little to know income. In order for the CoC to track increases of income, which are measured by CoC & HUD System Performance Measures, we must add interims to client entries to record these increases.

1. Log into CSIS
2. Enter data as (EDA) the project you will be creating the Interim for.
3. Search for your client, or enter client's CSIS ID.
4. Select the Entry/Exit Tab.
5. Click on the Checklist icon, , to create an Interim.
6. Click **"Add Interim Review."**
7. Save & Continue
8. Scroll to the **Income** field needed for update.
9. For example, the client has gotten a job and his Income needs to be updated.
10. If a previous income is listed, **you must end that income.**
 - a) For example, a client was making \$800.00/month but is now making \$1,000.00/month.
 - i. Select the pencil next to the \$800.00 amount to edit this income source and **end** the income.
 - ii. Select the **end date** as the date before the day you are adding the new income.
 - iii. If you are adding the **new** income on 02/21/2020, you would have an **end date** for the old income as 02/20/2020.
 - iv. Do not change any of the other fields. By **ending** this income, you are indicating this income is no longer current and the client does not receive this income any longer.
 - v. Save and Exit.
11. Update the **AMI, Total Monthly Income, Income from Any Source**, and **Add** an income in the **HUD Verification** fields.
 - a. To **Add** a **new** income source, select the **add** button and update the empty fields so CSIS can report the most current and correct information.
 - i. Add the monthly amount to \$1,000.00;
 - ii. Select a Source of Income;
 - iii. Select the Receiving Income Source to **YES**;
 - iv. **Save** this Income.
12. Scroll to the **Income Information** fields and update as you know the information to be true for today.
13. Continue to update any fields that need updating.
14. Save & Continue




Creating an Interim for Housing Move-In Date

The Housing Move-In Date is a required field for clients who are living in a Permanent Supportive Housing unit, or who are housing through a Rapid Rehousing project. This date will be the date the client moved into housing. This data is used to report to the CoC and HUD exactly how many days occurred between Project Entry and Permanent Housing.

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2. Enter data as (EDA) the project you will be creating the Interim for.
3. Search for your client, or enter client's CSIS ID.
4. Select the Entry/Exit Tab.
5. Click on the Checklist icon, , to create an Interim.
6. Click **"Add Interim Review."**
7. Select the Interim Review Type you are creating (**Housing Status Update**)
8. Save & Continue
9. Scroll to the field indicating **Housing Move-In Date**.
10. Upon move-in, update the client's **Housing Status**. Update to **At-Risk**.
 - a. The logic behind **At Risk** is if a client is receiving ongoing rental assistance from a RRH subsidy, the client is not **Stably Housed**.




Living Situation

11.

Client Location *	FL-500  
Housing Status *	At-risk of homelessness (HUD) 

12. Update any other fields that may require updating (i.e. income, non-cash, etc.)
13. Add the Client's new Contact Information and end any old or out of date information.

Contact Information

Client's Residence / Last Permanent Address										
	Client's Street Address	Client's Apartment Number	Client's City	Client's ZIP	Home Phone Number	E-Mail Address	Cell Phone#	County of Residence	Start Date *	End Date
	1111 Dream Avenue		Sarasota	34236		brandon.test@gmail.com	941-666-6666	Sarasota	02/28/2020	
	Lemon Bus Station	Everyday	Sarasota						12/28/2017	02/27/2020
	1223 89th St		Sarasota	34234	9415557777			Sarasota	06/14/2017	10/14/2017
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14. Save & Exit