



Income Estimation Tool Directions



This tool is meant to be used to:

- Help PHAs and Owners/Agents estimate if a family's income has likely changed by 10% or more, or in the case of decreases, to a lower threshold as established by PHA or Owner/Agent policy, based on the family's last reexamination of income or expenses.
- Provide the estimated amount (in dollars) and other information to households to help determine when the PHA or Owner/Agent is required to conduct an interim examination (at the request of the family or based on the requirements for increases) due to changes in income or changes in health/medical expenses for families meeting the eligibility criteria.



When to use this tool

Changes in Income

When a tenant recertifies, this tool should be reviewed with them and a copy should be provided so that they know when they should go to the office to see if they qualify for, or the PHA is required to conduct, an interim reexamination for income changes, health/medical deductions, or a hardship exemption.

When a family reports changes, this tool should be used by the PHA or Owner/Agent as a baseline to estimate if the amount of the reported changes meets or exceeds the threshold that would require a full reexamination of income to be completed. If the estimated changes do not meet the threshold, PHAs or Owners/Agents are not required to process an interim. Please note that if there is uncertainty based on the reported changes, PHAs or Owners/Agents may be required to complete all work related to an interim to estimate if the family qualifies.



How to use the tool

After certifying the household's annual income and adjusted annual income:

- Input the date of the recertification, it will adjust to the month and year
- Input the household's annual income
- Input the household's adjusted annual income
- Input the threshold for a recertification based on an income decrease if a lower threshold has been established by policy. The default is set at 10% and must be entered as 10% or lower.
- Input the office contact information and include any available walk-in dates and times
- Review the sheet with the head of household and suggest that they keep it somewhere visible for easy access.