



CHAPTER 3

ANNUAL and ON-GOING

ACTIVITIES

GUIDED ASSESSMENT

RENT CALCULATION 360 – Practicum Booklet	
Chapter 3 – Recertification Timeline Guided Assessment	3-2
Chapter 3 – EIV Review Guided Assessment	3-5
Chapter 3 – Interim Reexamination Polices Guided Assessment	3-17

Establishing a Recertification Timeline

A year has passed, and it is time to recertify some of the families in your caseload. The Thomas and Fields families are due for recertification on July 1st. You know how important it is to establish and stick to a timeline when it comes to annual recertifications, so you pull out your calendar.

On the calendars below, start filling in your recertification timeline. Start with when the recert is due, and work your way back to determine when initial contact should be made as well as follow-up contact, and ultimately, when a proposed termination should be sent if needed.

Remember, QHA's policy states that families will be given 10 business days to respond to requests from the Housing Authority.

↑ Today ^ v March 2026 v In office						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Mar 1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17 St. Patrick's Day ↻	18	19	20	21
22	23	24	25	26	27	28
29	30	31	Apr 1	2	3	4

↑ Today ^ ▼ April 2026 ▼ In office						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Mar 29	30	31	Apr 1	2	3	4
5 Easter Day	6	7	8	9	10	11
12	13	14	15 Tax Day	16	17	18
19	20	21	22 Administrative Profes	23	24	25
26	27	28	29	30	May 1	2

↑ Today ^ ▼ May 2026 ▼ In office						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Apr 26	27	28	29	30	May 1	2
3	4	5	6	7	8	9
10 Mother's Day	11	12	13	14	15 Peace Officers Me	16
17	18	19	20	21	22	23
24	25 Memorial Day	26	27	28	29	30
31	Jun 1	2	3	4	5	6

↑ Today

^ June 2026 v

In office

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
May 31	Jun 1	2	3	4	5	6
7	8	9	10	11	12	13
14 Flag Day ↻	15	16	17	18	19 Juneteenth ↻	20
21 Father's Day	22	23	24	25	26	27
28	29	30	Jul 1	2	3 Independence Day (C)	4 Independence Day ↻

↑ Today

^ July 2026 v

In office

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Jun 28	29	30	Jul 1	2	3 Independence Day (C)	4 Independence Day ↻
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	Aug 1



CHAPTER 3

EIV Review

Guided Assessment

Reviewing EIV

You have sent out the initial reexamination notification to your caseload and now you are waiting for responses. While you wait, you log into the Enterprise Income Verification site and pull income report for the Fields family.

Review the EIVs for the Fields family on the following pages, and make note of anything you think will be important for the recertification.

Notes

Confidential. Privacy Act Data. Civil and criminal penalties apply to misuse of this data.

Unemployment Benefits

EIV received no benefit data.

Social Security Benefits

Verification Data		Payment History of Net Benefits Paid		
Payment Status Code:	U - Active uninsured status	Date	Federal Amount	Type of Payment
Date of Current Entitlement:		01/01/2026	\$994.00	Recurring Payment
Net Monthly Benefit if Payable:	\$994.00	01/01/2025	\$974.00	Recurring Payment
Payee Name and Address:	Payton Fields 56 Hampton Ave Indianapolis, IN	01/01/2024	\$935.00	Recurring Payment
		01/01/2023	\$908.00	Recurring Payment
		01/01/2022	\$847.00	Recurring Payment
		01/01/2021	\$823.00	Recurring Payment
		01/01/2020	\$756.00	Recurring Payment
		01/01/2019	\$704.00	Recurring Payment
		Lump Sum		
		Date	Amount	
		12/01/2025	\$0.00	

Dual Entitlement

EIV received no benefit data.

Medicare Data

Date Received by EIV: 12/04/2025

Supplemental Security Income Benefits

Verification Data		Payment History of Net Benefits Paid		
Payment Status Code:	C01 - Current Pay	Date	Federal Amount	Type of Payment
Alien Indicator:	C	01/01/2026	\$344.00	Recurring Payment
SSI Monthly Assistance Amount (Current):	\$344.00	01/01/2025	\$325.00	Recurring Payment
State Supplement Amount (Current):		01/01/2024	\$286.00	Recurring Payment
Payee Name and Address:	Payton Fields	01/01/2023	\$273.00	Recurring Payment
		01/01/2022	\$246.00	Recurring Payment
		01/01/2021	\$225.00	Recurring Payment
		01/01/2020	\$198.00	Recurring Payment
		01/01/2019	\$142.00	Recurring Payment
Date Received by EIV: 12/04/2025				

Disability

Disability: Yes On-set Date:

Date Received by EIV: 12/04/2025

Report Date: 01/22/2025

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.Report Generated By - M XXXX Quadel HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Confidential. Privacy Act Data. Civil and criminal penalties apply to misuse of this data.

[Print](#)[Summary Report](#) [Certification Page](#) [Income Report](#)[Print](#)

Income Report for Household of Payton Fields

PHA Code:	IN000	Program Type:	T
PHA Name:	IN000 QHA	Project:	
Annual Reexamination Date:	07/01/2026	Form 50058 as of:	09/01/2022
Address:	56 Hampton Ave		
Most Recent Type of Action:	7-Unit Change	Effective Date:	07/01/2025

Head of Household: Payton Fields

Social Security Number:	***_**_****	Date of Birth:	XX/XX/XXXX
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Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.Report Generated By - M XXXX Quadel HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

[Print Household Member Information](#)

Household Member:	Payton Fields	SSN:	***_**_****
Date of Birth:	XX/XX/XXXX	Relationship:	Head
Date Verified	03/30/2026	Verification Status/Code	Verified

Employment Information

EIV received no Employment (W4) data.

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.Report Generated By - M XXXX Quadel HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Wages

EIV received no income data.

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.Report Generated By - M XXXX Quadel HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Reviewing EIV

You have sent out the initial reexamination notification to your caseload and now you are waiting for responses. While you wait, you log into the Enterprise Income Verification site and pull income report for the Thomas family.

Review the EIVs for the Thomas family on the following pages, and make note of anything you think will be important for the recertification.

Notes

Summary Report Certification Page Income Report

Print

Print

Income Report for Household of Lauren Thomas

PHA Code: IN000
PHA Name: IN000 QHA

Program Type: T
Project:

Annual Reexamination Date: 03/01/2026

Form 50058 as 03/06/2025
of:

Address:

Most Recent Type of Action: 3-Interim Reexamination

Effective Date: 03/01/2025

Head of Household: Lauren Thomas

Social Security Number: ***_**_****

Date of Birth: XX/XX/XXXX

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.

Report Generated By - MXXX QUADEL HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Household Member:	Frank Thomas	SSN:	***_**_****
Date of Birth:	XX/XX/XXXX	Relationship:	Other youth under 18
Date Verified	12/04/2025	Verification Status/Code	Verified

EV received no income or benefits data.

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.

Report Generated By - M XXX QUADEL HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Social Security Benefits

Verification Data

Payment Status Code: N - Disallowed claim
Date of Current Entitlement:
Net Monthly Benefit if Payable: \$0.00
Payee Name and Address:

Benefit History

Gross Benefit

Date

Date Received by EIV: 12/04/2025

Lump Sum

Date

11/01/2024

Amount

\$0.00

Dual Entitlement

EIV received no benefit data.

Medicare Data

EIV received no benefit data.

Supplemental Security Income Benefits

EIV received no benefit data.

Disability

Disability:

No

On-set Date:

Date Received by EIV: 12/04/2025

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.

Report Generated By - MXXX QUADEL HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Supplemental Security Income Benefits

EIV received no benefit data.

Disability

Disability:

No

On-set Date:

Date Received by EIV: 12/04/2025

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.Report Generated By - M XXX Quadel HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Household Member: James Thomas
Date of Birth: XX/XX/XXXX
Date Verified 12/04/2024

SSN: ***-**-****
Relationship: Other Adult
Verification Status/Code Verified

Employment Information

Hire Date	Hire State	FEIN	Employer Name and Address	Date Received by EIV
01/17/2024		00-101010	SONIC DRIVE IN 66 S RACEWAY INDIANAPOLIS, IN	02/14/2024

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.Report Generated By - M XXX QUADEL HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Wages

Pay Period	Amount	FEIN	Employer Name and Address	Date Received by EIV
Q4 of 2025	\$1,080.00	00-101010	SONIC DRIVE IN 66 S RACEWAY INDIANAPOLIS, IN	01/15/2026
Q3 of 2025	\$1,080.00	00-101010	SONIC DRIVE IN 66 S RACEWAY INDIANAPOLIS, IN	11/19/2025
Q2 of 2025	\$161.00	00-101010	SONIC DRIVE IN 66 S RACEWAY INDIANAPOLIS, IN	08/16/2025
Q1 of 2025	\$1,540.00	00-101010	SONIC DRIVE IN 66 S RACEWAY INDIANAPOLIS, IN	05/16/2025
Q4 of 2024	\$4,362.00	00-101010	SONIC DRIVE IN 66 S RACEWAY INDIANAPOLIS, IN	02/15/2025
Q3 of 2024	\$4,037.00	00-101010	SONIC DRIVE IN 66 S RACEWAY INDIANAPOLIS, IN	11/19/2024
Q2 of 2024	\$3,894.00	00-101010	SONIC DRIVE IN 66 S RACEWAY INDIANAPOLIS, IN	08/23/2024

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.Report Generated By - M XXX QUADEL HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Household Member:	Phil Thomas	SSN:	***_**_****
Date of Birth:	XX/XX/XXXX	Relationship:	Spouse
Date Verified	12/04/2025	Verification Status/Code	Verified

Employment Information

Hire Date	Hire State	FEIN	Employer Name and Address	Date Received by EIV
07/11/2014		61-123456	PIEOLOGY BROKAW COMMON LLC 30342 MCDONALD RD INDIANAPOLIS, IN	08/26/2014

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.Report Generated By - MATXXX OSCAR M TRINH

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Wages

Pay Period	Amount	FEIN	Employer Name and Address	Date Received by EIV
Q4 of 2014	\$140.00	61-123456	PIEOLOGY BROKAW COMMON LLC 30342 MCDONALD RD INDIANAPOLIS, IN	05/22/2015
Q3 of 2014	\$2,728.00	61-123456	PIEOLOGY BROKAW COMMON LLC 30342 MCDONALD RD INDIANAPOLIS, IN	02/20/2015

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.Report Generated By - MXXX QUADEL HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Unemployment Benefits

Pay Period	Amount	Date Received by EIV
Q3 of 2024	\$0.00	11/13/2024
Q4 of 2021	\$3,173.00	02/10/2022
Q3 of 2021	\$1,670.00	11/10/2021
Q2 of 2021	\$1,670.00	08/12/2021
Q3 of 2020	\$0.00	11/19/2020

Social Security Benefits**Verification Data**

Payment Status Code: N - Disallowed claim
 Date of Current Entitlement:
 Net Monthly Benefit if Payable: \$0.00
 Payee Name and Address: Phil Thomas

Benefit History

Date	Gross Benefit
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Lump Sum

Date	Amount
Date Received by EIV: 12/04/2024	10/01/2024 \$0.00

Dual Entitlement

EIV received no benefit data.

Medicare Data

EIV received no benefit data.

Social Security Benefits

EIV received no benefit data.

Dual Entitlement

EIV received no benefit data.

Medicare Data

EIV received no benefit data.

Supplemental Security Income Benefits

EIV received no benefit data.

Disability

Disability:

No

On-set Date:

Date Received by EIV: 12/04/2024

Report Date: 03/13/2025

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.

Report Generated By - M XXX QUADEL HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Household Member: Lauren Thomas SSN: ***_**_****
 Date of Birth: XX/XX/XXXX Relationship: Head
 Date Verified 12/04/2025 Verification Status/Code Verified

Employment Information

Hire Date	Hire State	FEIN	Employer Name and Address	Date Received by EIV
06/25/2021		94-654321	INDIANA HEALTH CENTER 1333 MERIDIAN AVE, Indianapolis, IN	07/18/2021

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.
 Report Generated By - M XXX QHA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Wages

Pay Period	Amount	FEIN	Employer Name and Address	Date Received by EIV
Q4 of 2025	\$16,081.00	94-654321	INDIANA HEALTH CENTER MERIDIAN AVE	05/11/2025
Q3 of 2025	\$19,510.00	94-654321	INDIANA HEALTH CENTER MERIDIAN AVE	02/16/2025
Q2 of 2025	\$16,837.00	94-654321	INDIANA HEALTH CENTER MERIDIAN AVE	11/15/2025
Q1 of 2023	\$15,455.00	94-654321	INDIANA HEALTH CENTER MERIDIAN AVE	08/15/2023
Q4 of 2022	\$21,042.00	94-654321	INDIANA HEALTH CENTER MERIDIAN AVE	05/30/2023
Q3 of 2022	\$15,935.00	94-654321	INDIANA HEALTH CENTER MERIDIAN AVE	02/13/2023
Q2 of 2022	\$14,576.00	94-654321	INDIANA HEALTH CENTER MERIDIAN AVE	11/12/2022

Confidential Privacy Act Data. Civil and Criminal penalties apply to misuse of this data.
 Report Generated By - M XXX QUADEL HA

* The difference between the gross and net benefit may include the Medicare premium and/or additional deductions, such as garnishments, which are not listed on this report.

Unemployment Benefits

Pay Period	Amount	Date Received by EIV
Q3 of 2005	\$0.00	12/04/2005
Q4 of 2003	\$1,205.00	10/16/2005



CHAPTER 3

Interim Reexamination Policies

Guided Assessment

Interim Reexamination Policies

PHAs can have very different policies when it comes to processing interims. So let's shift gears, and talk about YOUR housing authority's policies rather than QHA's policies.

Please answer each of the questions below regarding your PHA's interim reexamination policies. If you are unsure about any of the questions, try reviewing your Admin Plan.

1. Is an EIV required when processing an interim?
2. Do you process income decreases?
3. When are income decreases made effective?
4. When are income increases made effective?
5. How soon are families required to report changes to the PHA?
6. Are there other important policies to note when processing interims?