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MEMORANDUM 2026-17 (AH)

TO: BCHA Board of Commissioners

THRU: Parnell Joyce, Chief Executive Officer

FROM: Tiffany Garcia & Marie De La Rosa, Executive Deputy Directors

DATE: September 15, 2026

SUBJECT: Updates to the Administrative Plan

REQUESTED ACTION:

Motion to approve updates to the Administrative Plan – Chapter 11: Interim Changes, Chapter 17 Project Based Vouchers and Chapter 18: Special Purpose Vouchers.

WHY ACTION IS NECESSARY:

The administrative policy updates are necessary to ensure that the Assisted Housing department remains in full alignment with the provisions of the Housing Opportunities Through Modernization Act of 2016 (HOTMA), HUD guidance, and current program requirements. By clarifying thresholds, definitions, and documentation requirements, BCHA strengthens regulatory compliance, reduces administrative burden, and improves consistency in program administration.

WHAT ACTION ACCOMPLISHES:

Streamlines interim processing by aligning household composition changes with the upcoming annual reexamination, reducing unnecessary case actions. Clarifies documentation requirements and regulatory definitions to maintain program integrity. Updates outdated program timelines for the Emergency Housing Voucher program to reflect current program end dates.

SUMMARY EXPLANATION/BACKGROUND:

The Housing Opportunities Through Modernization Act of 2016 (HOTMA) permits the Public Housing Authority (PHA) to determine how interim changes related to the addition or removal of household members will be handled during the last 3 months of an annual reexamination cycle. The Assisted Housing Department proposes to process any household additions or removals reported during the last three months of the reexamination period as part of the upcoming reexamination. This change will streamline case processing and reduce the number of required interim actions during the reexamination cycle (Chapter 11 – Interim Changes)

HOTMA additionally allows the PHA to decline conducting an interim reexamination when the PHA estimates that a family's adjusted income will decrease by less than 10%. A HUD-50058 must still be submitted to HUD to report the change, and HUD permits the PHA to establish a lower threshold. Because Specialists must still complete the full set of tasks required for an interim change, the Assisted Housing Department proposes setting the threshold at 0%. This approach ensures families receive a rent reduction regardless of the percentage decrease in income (Chapter 11-Interim Changes).

Other corrections or clarifications include:

- Chapter 11 – Require documentation of immigration status or non-contending status for all household members added to the family composition.
- Chapter 17 - Define "elderly family" in alignment with 24 CFR 5.403 for both Hillsboro Crossing and Tequesta Reserve preferences. Removes reference to National Housing Trust Fund units in Hillsboro Crossing as those units are not part of the Housing Assistance Payment Contract.
- Chapter 18 – Update the time-limitation section related to Emergency Housing Vouchers to reflect the program will end in 2026.

FISCAL IMPACT/COST SUMMARY:

None

Chapter 11 - Reexaminations

PART II: INTERIM REEXAMINATIONS [24 CFR 982.516; Notice PIH 2023-27]

11-II.A. OVERVIEW

Family circumstances may change between annual reexaminations. HUD and PHA policies dictate what kinds of information about changes in family circumstances must be reported, and under what circumstances the PHA must process interim reexaminations to reflect those changes.

A family may request an interim determination of family income or composition because of any changes since the last determination. The PHA must conduct any interim reexamination within a reasonable period of time after the family request or when the PHA becomes aware of a change in the family's adjusted income that must be processed in accordance with HUD regulations. What qualifies as a "reasonable time" may vary based on the amount of time it takes to verify information, but the PHA generally should conduct the interim reexamination not longer than 30 days after the PHA becomes aware of changes in income.

Notice PIH 2023-27 changes the conditions under which interim reexaminations must be conducted, codifies when interim reexaminations should be processed and made effective, and requires related changes for annual reexaminations and streamlined income determinations. When the PHA determines that an interim reexamination of income is necessary, they must ask the family to report changes in all aspects of adjusted income.

11-II.B. CHANGES IN FAMILY AND HOUSEHOLD COMPOSITION

Reporting

PHAs must require families to report household composition changes; however, PHAs determine the timeframe in which reporting happens [Notice PIH 2023-27]. The PHA must adopt policies prescribing when and under what conditions the family must report changes in income and family composition [24 CFR 960.257(b)(5)].

<u>PHA Policy</u>

All families must report all changes in family and household composition that occur between annual reexaminations.

<u>**During the last three months of a reexamination period, BCHA will not perform an interim reexamination when the family reports the addition or removal of a household member. The addition or removal will be included with the upcoming annual reexamination (PIH Notice 2026-09)**</u>

New Family Members <u>Not</u> Requiring PHA Approval

The addition of a family member as a result of birth, adoption, or court-awarded custody does not require PHA approval. However, the family is required to promptly notify the PHA of the addition [24 CFR 982.551(h)(2)].

<u>PHA Policy</u>

The family must inform the PHA of the birth, adoption, or court-awarded custody of a child within 30 days.

The family must inform the PHA of the birth, adoption, or court-awarded custody of a child within thirty days.

Minors

a. The PHA will require birth certificate and Social Security Numbers for minors. Failure to provide a social security number within 90 days will result in termination of assistance for failure to comply with program requirements.

b. For a parent or another person having custody or guardianship of such individual or individuals the PHA will require one of the following documents:

1. Court-order assignment; or
2. Statement from parent/guardian assigning custody or guardianship; or
3. Custody Agreement filed in a court of law; or
4. Adoption papers; or
5. Verification from social service agency

c. **<u>The PHA will require documentation of immigration status, or non-contending status where applicable.</u>**

d. Adding family members resulting from birth, court awarded custody or adoption shall not require Agency approval. The family must notify the PHA within thirty days of the addition.

New Family and Household Members Requiring Approval

With the exception of children who join the family as a result of birth, adoption, or court-awarded custody, a family must request PHA approval to add a new family member [24 CFR 982.551(h)(2)] or other household member (live-in aide or foster child) [24 CFR 982.551(h)(4)].

Although the PHA must verify aspects of program eligibility when any new family member is added, the Streamlining Final Rule removed the requirement that PHAs **conduct a** reexamination of income whenever a new family member is added. The PHA may state in policy that an income reexamination will be conducted.

If a change in family size causes a violation of space standards (see Chapter 8), the PHA must issue the family a new voucher, and the family and PHA must try to find an acceptable unit as soon as possible. If an acceptable unit is available for rental by the family, the PHA must terminate the family's HAP contract in accordance with its terms [24 CFR 982.403].

<u>PHA Policy</u>

Requirements to Add Family or Household Members

General

a. All family or household additions other than those listed in 2.c) above, "New Family Members <u>Not</u> Requiring PHA Approval" must be approved by the PHA. This includes family members, live-in aides, and foster children.

b. If the addition of a foster adult or child will result in an HQS violation, the request to add them will be denied.

c. The family will be issued a voucher and required to move to an appropriately sized unit if the addition of a family member or a live-in aide will result in an HQS violation.

Families must request PHA approval to add a new family member, live-in aide, foster child, or foster adult. This includes any person not on the lease who is expected to stay in the unit for more than thirty consecutive days or ninety cumulative days within a twelve-month period and therefore no longer qualifies as a "guest." Requests must be made in writing and approved by PHA prior to the individual moving into the unit.

The PHA will not approve additions of a family to the existing household, except for the purpose of reasonable accommodation for member(s) of the currently subsidized family.

The PHA will not approve the addition of a new household member unless the individual meets the PHA's eligibility criteria (see Chapter 3) and documentation requirements (see Chapter 7, Part II).

The PHA will not approve the addition of former adult household members that were deemed permanently absent except for purpose of reasonable accommodation for a member(s) of the currently subsidized family. The PHA will not approve the addition of former adult household family members that were deemed permanently absent during times of budget constraints.

If the PHA determines that an individual does not meet the PHA's eligibility criteria or documentation requirements, the PHA will notify the family in writing of its decision to deny approval of the new family or household member and the reasons for the denial.

The PHA will make its determination after receiving all information required to verify the individual's eligibility.

Persons 18 years of age or older:

When the participant requests an adult person (defined as someone 18 years of age or older) be added to the family composition, the following will be required:

a. Social security number, verification of income, and all other eligibility related requirements; the individual will be required to sign HUD form 9886 (Release of Information);
b. **The PHA will require documentation of immigration status or non-contending status where applicable;**
c. The adult is subject to the same screening and eligibility requirements as the assisted family.

The PHA will notify the family in writing if there is a determination to deny the addition of any family member(s). The family may appeal by requesting an Informal Hearing as outlined in this Plan.

Interim Decreases [24 CFR 982.516(c)(2) and Notice PIH 2023-27]

A family may request an interim determination of family income for any change since the last determination. However, the PHA may decline to conduct an interim reexamination if the PHA estimates the family's adjusted income will decrease by an amount that is less than 10 percent of the family's adjusted income. The PHA may set a lower threshold in PHA policy such as performing an interim for any decreases in adjusted income, although HUD prohibits the PHA from setting a dollar-figure threshold.

However, while the PHA has some discretion, HUD requires that the PHA perform an interim reexamination for a decrease in adjusted income of any amount in two circumstances:

- When there is a decrease in family size attributed to the death of a family member; or

- When a family member permanently moves out of the assisted unit during the period since the family's last reexamination.

In the above circumstances, the PHA must perform an interim reexamination for any decrease in adjusted income.

If the net effect of the changes in adjusted income due to a decrease in family size results in no change or an increase in annual adjusted income, then PHA must process the removal of the household member(s) as a non-interim reexamination transaction without making changes to the family's annual adjusted income.

PHA Policy

The PHA will conduct an interim any time the family's adjusted income has decreased by an amount that is ~~10~~ **0** percent or more of the family's adjusted income.

~~When determining the 10 percent threshold, the PHA will round calculated percentages up or down to the next nearest unit as applicable (e.g., a calculated decrease of 9.5 percent will be rounded to 10 percent).~~

Interim Increases [24 CFR 982.516(c)(3) and Notice PIH 2023-27]

Increases Less than 10 Percent

PHAs must not process interim reexaminations for income increases that result in less than a 10 percent increase in annual adjusted income.

Increases 10 Percent or Greater

PHAs must conduct an interim reexamination of family income when the PHA becomes aware that the family's adjusted income has changed by an amount that the PHA estimates will result in an increase of 10 percent or more in adjusted income, with the following exceptions:

- PHAs may not consider any increases in earned income when estimating or calculating whether the family's adjusted income has increased, unless the family has previously received an interim reduction during the same reexamination cycle; and

- PHAs may choose not to conduct an interim reexamination during the last three months of a certification period if a family reports an increase in income within three months of the next annual reexamination effective date.

When the family previously received an interim reexamination for a decrease to adjusted income during the same annual reexamination cycle, a PHA has the discretion whether to consider a subsequent increase in earned income.

PHA Policy

The PHA will not consider increases in earned income when a family reports an increase between annual reexaminations, regardless of the amount of the increase, and regardless of whether there was a previous decrease since the family's last annual reexamination.

The PHA will process an interim for any other increases that meet the 10 percent threshold.

The PHA may choose not to conduct an interim reexamination if a family reports an increase in income within three months of their next annual reexamination effective date [24 CFR 982.516(c)(3)(ii)].

PHA Policy

The PHA will not perform an interim reexamination when a family reports an increase in income (whether earned or unearned income) within three months of their annual reexamination effective date.

During the last three months of a reexamination period, BCHA will not perform an interim reexamination when the family reports the addition or removal of a household member. The addition or removal will be included with the upcoming annual reexamination. (PIH Notice 2026-09)

Chapter 17: Project-Based Vouchers

17-VI.C. Organization of the Waiting List

PHA Waiting List Preferences [24 CFR 983.251(c)(3)]

The PHA may establish in its administrative plan any preferences for occupancy of particular units including the name of the projects and the specific preferences that are to be used by project. Criteria for occupancy of units (e.g., elderly families) may also be established, however, selection of families must be done through admission preference. The PHA may use the same selection preferences that are used for the tenant-based voucher program, establish selection criteria or preferences for the PBV program as a whole, or for occupancy of particular PBV developments or units. The PHA must provide an absolute selection preference for eligible in-place families as described in Section 17-VI.B. above. For both excepted units and units under the increased program cap, 24 CFR

983.262(b)(2) requires that the PHA must select families from the waiting list though an admission preference for these types of units.

PHA Policy

The PHA will provide a selection preference for the projects below:

Hillsboro Crossing is a Senior (62+) Community considered excepted units for elderly with 1 & 2 bedroom units serving persons/families aged 62 and older

· Senior (62+) Community – Individuals and families aged 62 or older

· LINK units (4 units) – Individuals and families aged 62 or older, who qualify as Special Needs under Florida Statutes 420.0014(13) and Extremely Low-income. These applicants are referred to the waitlist by the PBV owner through an MOU with a Florida Housing designated Referral Agency

· ~~NHTF (National Housing Trust Fund) (5units) – Individuals and families aged 62 or older, who qualify as Special Needs under Florida Statutes 420..14(13) and Extremely Low-income. These applicants are referred to the waitlist by the PBV owner through an MOU with a Florida Housing designated Referral Agency~~

Elderly family means a family whose head (including co-head), spouse, or sole member is a person who is at least 62 years of age. It may include two or more persons who are at least 62 years of age living together, or one or more persons who are at least 62 years of age living with one or more live-in-aides (24 CFR 5.403)

Tequesta Reserve is a Senior (62+) Community considered excepted units for elderly with 1 & 2 bedroom units serving persons/families aged 62 and older.

Elderly family means a family whose head (including co-head), spouse, or sole member is a person who is at least 62 years of age. It may include two or more persons who are at least 62 years of age living together, or one or more persons who are at least 62 years of age living with one or more live-in-aides (24 CFR 5.403)

· ~~The Tequesta Reserve waitlist will consist of elderly individuals and families age 62 or older.~~

Chapter 18: Special Purpose Vouchers

PART VI: EMERGENCY HOUSING VOUCHERS

Time Limitation on Funding:

~~Families who receive an EHV are not time limited, however, the PHA is limited in regards to issuance or re-issuance of the voucher.~~

Emergency Housing Voucher funds were appropriated through September 2030, however, HUD announced in 2025 that due to historically high rental costs, the program would end in 2026.

The PHA may re-issue an EHV to another EHV eligible family upon turnover of a voucher until 9/30/2023. An available turnover voucher cannot be issued on or after 10/01/2023.

If a voucher was not previously issued to a family, the PHA may issue the voucher after 09/30/2023.