

Poverty Level Assessments

Purpose	Record household and individual income data so CAREWare can calculate a client's Federal Poverty Level (FPL).
Who should do this	CAREWare users responsible for eligibility, annual review, RSR, or ADR data.
Use this guide when you need to	Add or update a Poverty Level Assessment in a client record.
Main warning	Date, household size, and household income are required for FPL calculation and RSR and ADR reporting.

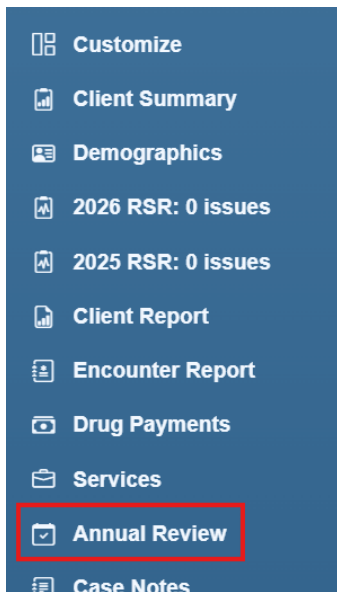
Quick path Client record > Annual Review > Poverty Level Assessments > Add

Before you begin

- Confirm the client record is correct and you have access to Annual Review.
- Gather the assessment date, household size, and household income.
- Determine whether your program also requires individual income.

Open Poverty Level Assessments

Step 1. Click Annual Review in the client record's left menu.



Step 2. Click Poverty Level Assessments.

Insurance Assessments

View or Edit the client's Insurance Assessments.

Poverty Level Assessments

View or Edit the client's Poverty Level Assessments.

Annual Custom

Step 3. Click Add.

View

Add

Edit

Delete

Back

Help

Print or Export

Column

Poverty Level Assessments

Search:

<<

<

>

>>

100

entries per page

Date

Household Size

Household Income

No Records

Poverty Level Assessments buttons

Use these commands to manage assessment records.

Item	What it does
View	Open the selected record.
Add	Create a poverty level assessment.
Edit	Change the selected assessment.
Delete	Remove the selected assessment.
Back	Return to the Annual Data menu.
Help	Open this user guide for Poverty Level Assessments.
Print or Export	Print or export the poverty level assessment list.
Column Visibility	Choose columns shown in the list.

Step 4. Complete Date, Household Size, and Household Income. Enter Individual Income if required by your program.

Save

Cancel

Poverty Level Assessments

Date:07/24/2026

Household Size:1

Household Income:1100.00\$

Individual Income:1100.00\$

Important Date, household size, and household income are required to calculate FPL and support RSR reporting. Individual income is optional.

Step 5. Click Save.

Save

Cancel

Poverty Level Assessments

Date:

07/24/2026

Household Size:

1

Household Income:

1100.00

\$

Individual Income:

1100.00

\$

How to confirm it worked

- The saved assessment appears in the Poverty Level Assessments list.
- The record shows the assessment date, household size, household income, individual income when entered, and calculated federal poverty level.
- Use View to confirm the selected record's details.

RSR and ADR reporting

Fields used Date, Household Size, and Household Income are used to calculate the client's percent of the federal poverty level for RSR question 9 and ADR question 11.

How to update FPL calculations in CAREWare

The U.S. Department of Health & Human Services releases updated federal poverty guidelines each year, typically in late January. After the guidelines are released, upgrade CAREWare to the build that contains the latest FPL calculations.

Using imports to update Poverty Level Assessments

CAREWare [data import options](#) can be used to update poverty level assessments in client records.

Troubleshooting and common questions

Why is the FPL not calculated?

Confirm that Date, Household Size, and Household Income are complete, then save the assessment.

Why might the calculated percentage change after an upgrade?

A newer CAREWare build may contain updated annual federal poverty guidelines.

Related References

Document	Use it for
RSR Documents	Documents related to the RSR, such as the reporting timeline and location of RSR fields in CAREWare.
ADR Documents	Documents related to the ADR, such as the location of ADR fields in CAREWare.