Case Studies

Directions

• Using the spaces provided and sections of the form HUD-50058, answer the following rent calculation questions and calculate the elements of annual income, adjusted income, and TTP. In HCV, calculate family share and the housing assistance payment. In public housing, calculate tenant rent.

Case Study 1: Alabaster Family

- **Situation:** The PHA is conducting its second annual recertification for the Alabaster Family.
- Family information:

Relation	Name	Age	Disabled
Head	Ava Alabaster	33	N
Youth	Alice Alabaster	12	N
Youth	Allan Alabaster	10	N

- Ava works full-time (40 hours per week) earning \$16.50 per hour.
- Ava reported that she has a non-interest-bearing checking worth \$1,300. This is her only asset.
- Ava's children are in an after school child care program while she works. She qualifies for a reduced rate. With her subsidy, Ava pays \$50 per week per child (\$100 total) for child care. This reduced rate stays the same even during school holidays when the kids are in the care program for full days.

• HCV Unit information:

- Unit size: 2-bedroom

Voucher size: 2-bedroomRent to Owner: \$1,575

2-bedroom payment standard: \$1,6502-bedroom utility allowance: \$125

• Public Housing Unit information:

- Unit size: 2-bedroom

2-bedroom flat rent: \$1,700

2-bedroom utility allowance: \$125

PHA policy:

- The PHA's minimum rent is \$50

6. Assets

6a. Family Member Name	No.	6b. Type of asset	6c. Is this asset included in net family assets?	6d. Cash	value of asset	6e. Actu	al Income	6f. Imput	ed Income
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
6g, 6h, 6i. Total net family assets, total actual income, total imputed income			\$	6g.	\$	6h.	\$	6i.	
6j. Passbook rate (written as decimal)							6j.		
6k. Final asset in	come:	6h + 6i (see instruction bookle	t)					6k.

7. Income

7a. Family Member Name	No.	7b. Income Code	7c. Calculation (PHA use)	7d. Dollars per year	7e. Income exclusions	7f. Income after exclusions
		0000				(7d minus 7e)
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
-				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
7g. Column total		1				\$ 7g.
7h. Reserved						
7i. Total annual income: 6k	7i.					
Over-Income Status (Pub	lic Hou	sing Only)			
7j. What is the applicable of	\$ 7j.					
7k. Is the family's annual in	come g	reater thar	n the over-income	limit? [] Y	[] N	7k.
7l. If the family is over-incor	ne, not	e the start	date of the 24 cor	nsecutive month grace p	period	71.

8. Deductions and Allowances

8a. Total annual income: copy from 7i			\$	8a.
Permissive Deductions				
8b. Family Member Name	No.	8c. Type of permissive deduction	8d. Amount	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
8e. Total permissive deductions (sum			\$	8e.
If head/spouse/co-head is under 62 a	and no fan	nily member is disabled, skip to 8l		
8f. Medical/disability threshold: 8a X 0.			\$	8f.
		ce expense (if no disability expenses, skip to 8k)	\$	8g.
8h. Maximum disability allowance: If 8			\$	8h.
		ative and head/spouse/co-head is under 62 and not led, put 0	\$	8h.
	If neg	ative and head/spouse/co-head is elderly or disabled, copy	\$	8h.
8i. Earnings in 7d made possible by di	\$	8i.		
		of 8h or 8i (if 8g is less than 8f and head/spouse/co-head	\$	8j.
	medical ex	penses (if head/spouse/co-head under 62 and not disabled,	\$	8k.
8l. Family is eligible for medical or child	care expe	nse hardshin or both?		81.
		al expense: 8j + 8k (if no disability expenses, copy from 8k)	\$	8m.
8n. Medical/disability assistance deduction:	If no o	disability assistance expenses or if 8g is less than 8f, put inus 8f (if 8m minus 8f is negative, put zero)	\$	8n.
	If disa	ability assistance expenses and 8g is greater than or equal copy from 8m	\$	8n.
8p. Elderly/disability allowance	"		\$	8p.
8q. Number of dependents (people unhousehold, spouse, co-head, foster chi		with disability, or full-time student. Do not count head of live-in aide.)		8q.
8r. Allowance per dependent	,	,	\$	8r.
8s. Dependent allowance: 8g X 8r			\$	8s.
8t. Total annual unreimbursed child ca	re costs		\$	8t.
8x. Total allowances: 8e + 8n + 8p + 8	s + 8t		\$	8x.
8y. Adjusted annual income: 8a minus	8x (if 8x is	larger, put 0)	\$	8y.

9. Total Tenant Payment (TTP)

9a. Total monthly income: 8a ÷ 12	\$ 9a.
9c. TTP if based on annual income: 9a X 0.10	\$ 9c.
9d. Adjusted monthly income: 8y ÷ 12	\$ 9d.
9e. Percentage of adjusted monthly income	\$ 9e.
9f. TTP if based on adjusted annual income: (9d X 9e) ÷ 100	\$ 9f.
9g. Welfare rent per month (if none, put 0)	\$ 9g.
9h. Minimum rent (if waived, put 0)	\$ 9h.
9i. Enhanced Voucher minimum rent	\$ 9i.
9j. TTP, highest of lines 9c, 9f, 9g, 9h, or 9i	\$ 9j.
9k. Most recent TTP	\$ 9k.
9m. Qualify for minimum rent hardship exemption? (Y or N)	\$ 9m.

10. Public Housing

100 TTD: conv from 0i			
10a. TTP: copy from 9j		\$	10a.
10b. Unit's flat rent		\$	10b.
Income Based Rent Calculation (if prorated rent, skip to 10	Dh)		
10d. Income Based Rent (Lower of 10a or 10b if authorized to	use ceiling rents; or if not, put 10a)	\$	10d.
10e. Utility allowance, if any		\$	10e.
10f. Tenant rent: 10d minus 10e	If positive or 0, put tenant rent	\$	10f.
	If negative, credit tenant	\$	10f.
10h. PHA-established flat rent	skip to 10u)	\$	
Income Based Prorated Rent Calculation (if not prorated,	skip to 10u)		
Income Based Prorated Rent Calculation (if not prorated, s 10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a	skip to 10u)	\$	10h. 10i.
10h. PHA-established flat rent	skip to 10u)		
10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a	skip to 10u)	\$	10i. 10j.
10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a 10j. Total number eligible	skip to 10u)	\$	10i. 10j. 10k.
10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a 10j. Total number eligible 10k. Total number in family	skip to 10u)	\$	
10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a 10j. Total number eligible 10k. Total number in family 10n. Eligible subsidy (10i ÷ 10k) X 10j	skip to 10u)	\$ \$ \$	10i. 10j. 10k. 10n.
10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a 10j. Total number eligible 10k. Total number in family 10n. Eligible subsidy (10i ÷ 10k) X 10j 10p. Mixed family TTP: 10h minus 10n	If positive or 0, put tenant rent	\$ \$ \$ \$	10i. 10j. 10k. 10n. 10p.

12. Housing Choice Vouchers: Tenant Based Vouchers

12. Housing Choice Vouchers. Tel	iant based voucher	3				
12a. Number of bedrooms on Voucher		12a.				
12b. Is family now moving to this unit? (Y or N)		12b.				
12d. Did family move into your PHA jurisdiction		12d.				
(if no, skip to 12g)						
10a Cast billed you want (wit 0 if abaculard)	Φ.	10-				
12e. Cost billed per month (put 0 if absorbed)	\$	12e.				
12f. PHA code billed			12f.			
12g. Housing type [] Group Home (pro	prate gross rent) [] Own manu	factured home, lease space				
12h. Owner name	upled by T person		12h.			
12i Owner TIN/SSN						
12j. Payment standard for the family		\$	12i. 12j.			
12k. Rent to owner		\$	12k.			
12I Is the family receiving a higher payment st	andard as a reasonable	\$	12k. 12l.			
accommodation? (Y or N)	andard as a reasonable	Ψ	121.			
12m. Utility allowance, if any		\$	12m.			
12n. Security deposit paid by the PHA on beha	If of the family if any	\$	1211. 12n.			
	ii oi tile iaililly, ii aily	Φ				
12o. Mobility-related services	anniana (Mari NI)		120(1).			
(1) Did the family receive mobility-related (12o(2).			
(2) Date family began receiving mobility-re		Φ.	10:-			
12p. Gross rent of unit: 12k + 12m (or Space R	ent)	\$	12p.			
12q. Lower of 12j or 12p		\$	12q.			
12r. TTP: copy from 9j		\$	12r.			
12s. Total HAP: 12q minus 12r		\$	12s.			
Rent Calculation (if prorated rent, skip to 12a	b)					
12t. Total family share: 12p minus 12s		\$	12t.			
12u. HAP to owner: lower of 12k or 12s		\$	12u.			
12v. Tenant rent to owner: 12k minus 12u		\$	12v.			
12w. Utility reimbursement to family: 12s minus	12u. but do not exceed	\$	12w.			
12m	.,	Ť				
Prorated Rent Calculation						
		Φ.	40-1-			
12ab. Normal total HAP: copy from 12s, but do	not exceed 12p	\$	12ab.			
12ac. Total number eligible			12ac.			
12ad. Total number in family			12ad.			
12ae. Proration percentage: 12ac ÷ 12ad			12ae.			
12af. Prorated total HAP: 12ab X 12ae		\$	12af.			
12ag. Mixed family total family contribution: 12p	minus 12af	\$	12ag.			
12ah. Utility allowance: copy from 12m	\$	12ah.				
12ai. Mixed family tenant rent to owner: 12ag	\$	12ai.				
minus 12ah	tenant rent If negative, credit tenant					
	\$	12ai.				
12aj. Prorated HAP to owner: 12k minus 12ai. I	\$	12aj.				
Additional Payments (not HAP)						
12ap. Additional financial support for tenant-bas	ed voucher family	\$	12ap.			
12aq. Financial incentive for property owner	oa vouonoi iumny	\$	12ap.			
12aq. Financiai incentive for property owner	Ψ	1284.				

Case Studies

Case Study 2: Butler Family

• **Situation:** The PHA is conducting an interim reexamination based on an income change, which was timely reported by Betty.

• Family information:

Relation	Name	Age	Disabled
Head	Betty Butler	43	N
Full-time Student	Bobbie Butler	18	N
Youth	Bert Butler	14	N
Youth	Bryte Butler	12	N

- Betty has a non-interest-bearing checking account worth \$10,200. Bobbie has a savings account with a current balance of \$5,000 and she reported that it earned \$65 in interest.
- At her annual, Betty was receiving \$750 a month in cash TANF benefits for herself and her children until last week when she was sanctioned by the welfare agency for noncompliance with their economic self-sufficiency requirements. The PHA verified that Betty's cash TANF was reduced to \$350 per month. This is expected to last for the next 12 months.
- Bobbie, a full-time junior college student, works part-time at Bath and Body Works, earning \$500 biweekly. Bobbie also receives an annual Pell Grant (which is assistance under Title IV of the HEA) in the amount of \$5,000.
- Betty pays a neighbor \$60 per week to care for Bryte while she attends school year-round

• HCV Unit information:

Unit size: 4-bedroom

Voucher size: 3-bedroom

- Rent to owner: \$1,750

4-bedroom payment standard: \$1,790

- 3-bedroom payment standard: \$1,620

4-bedroom utility allowance: \$170

- 3-bedroom utility allowance: \$145

Public Housing Unit information:

Unit size: 3-bedroom

- 3-bedroom flat rent: \$1,765

- 3-bedroom utility allowance: \$145

PHA policy:

- The PHA's minimum rent is \$25

6. Assets

6a. Family Member Name	No.	6b. Type of asset	6c. Is this asset included in net family assets?	6d. Cash v	alue of asset	6e. Actu	ial Income	6f. Imput	ed Income
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
6g, 6h, 6i. Total net family assets, total actual income, total imputed income			\$	6g.	\$	6h.	\$	6i.	
6j. Passbook rate (written as decimal)							6j.		
6k. Final asset in	come:	6h + 6i (see instruction bookle	t)					6k.

7. Income

7a. Family Member Name	No.	7b. Income Code	7c. Calculation (PHA use)	7d. Dollars per year	7e. Income exclusions	7f. Income after exclusions
		0000				(7d minus 7e)
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
7g. Column total		1				\$ 7g.
7h. Reserved						
7i. Total annual income: 6k	7i.					
Over-Income Status (Pub	lic Hou	sing Only)			
7j. What is the applicable of	\$ 7j.					
7k. Is the family's annual in					[] N	7k.
7l. If the family is over-incor	period	71.				

8. Deductions and Allowances

8a. Total annual income: copy from 7i			\$	8a.
Permissive Deductions				
8b. Family Member Name	No.	8c. Type of permissive deduction	8d. Amount	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
8e. Total permissive deductions (sum			\$	8e.
If head/spouse/co-head is under 62 a	and no fan	nily member is disabled, skip to 8l		
8f. Medical/disability threshold: 8a X 0.			\$	8f.
		ce expense (if no disability expenses, skip to 8k)	\$	8g.
8h. Maximum disability allowance: If 8			\$	8h.
		ative and head/spouse/co-head is under 62 and not led, put 0	\$	8h.
	If neg	ative and head/spouse/co-head is elderly or disabled, copy	\$	8h.
8i. Earnings in 7d made possible by di	\$	8i.		
		of 8h or 8i (if 8g is less than 8f and head/spouse/co-head	\$	8j.
	medical ex	penses (if head/spouse/co-head under 62 and not disabled,	\$	8k.
8l. Family is eligible for medical or child	care expe	nse hardshin or both?		81.
		al expense: 8j + 8k (if no disability expenses, copy from 8k)	\$	8m.
8n. Medical/disability assistance deduction:	If no o	disability assistance expenses or if 8g is less than 8f, put inus 8f (if 8m minus 8f is negative, put zero)	\$	8n.
	If disa	ability assistance expenses and 8g is greater than or equal copy from 8m	\$	8n.
8p. Elderly/disability allowance	"		\$	8p.
8q. Number of dependents (people unhousehold, spouse, co-head, foster chi		with disability, or full-time student. Do not count head of live-in aide.)		8q.
8r. Allowance per dependent	,	,	\$	8r.
8s. Dependent allowance: 8g X 8r			\$	8s.
8t. Total annual unreimbursed child ca	re costs		\$	8t.
8x. Total allowances: 8e + 8n + 8p + 8	s + 8t		\$	8x.
8y. Adjusted annual income: 8a minus	8x (if 8x is	larger, put 0)	\$	8y.

9. Total Tenant Payment (TTP)

9a. Total monthly income: 8a ÷ 12	\$ 9a.
9c. TTP if based on annual income: 9a X 0.10	\$ 9c.
9d. Adjusted monthly income: 8y ÷ 12	\$ 9d.
9e. Percentage of adjusted monthly income	\$ 9e.
9f. TTP if based on adjusted annual income: (9d X 9e) ÷ 100	\$ 9f.
9g. Welfare rent per month (if none, put 0)	\$ 9g.
9h. Minimum rent (if waived, put 0)	\$ 9h.
9i. Enhanced Voucher minimum rent	\$ 9i.
9j. TTP, highest of lines 9c, 9f, 9g, 9h, or 9i	\$ 9j.
9k. Most recent TTP	\$ 9k.
9m. Qualify for minimum rent hardship exemption? (Y or N)	\$ 9m.

10. Public Housing

10a. TTP: copy from 9i		\$	10a.
10b. Unit's flat rent		\$	10b.
TOD. OTHES HALTETIL		Ψ	100.
Income Based Rent Calculation (if prorated rent, skip to 10h)			
10d. Income Based Rent (Lower of 10a or 10b if authorized to us	se ceiling rents; or if not, put 10a)	\$	10d.
10e. Utility allowance, if any		\$	10e.
10f. Tenant rent: 10d minus 10e	If positive or 0, put tenant rent	\$	10f.
	If negative, credit tenant	\$	10f.
Income Based Prorated Rent Calculation (if not prorated, ski 10h. PHA-established flat rent	p to rouj	\$	10h.
income based Prorated Kent Calculation (if not prorated, Ski	p to 10u)		
10h. PHA-established flat rent	p to Touj		
10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a	p to Total	\$ \$ \$	10i.
10h. PHA-established flat rent	p to Toul	\$	10i. 10j.
10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a 10j. Total number eligible	p to Toul	\$	
10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a 10j. Total number eligible 10k. Total number in family	p to Toul	\$ \$ \$	10i. 10j. 10k. 10n.
10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a 10j. Total number eligible 10k. Total number in family 10n. Eligible subsidy (10i ÷ 10k) X 10j	p to Tody	\$ \$ \$	10i. 10j. 10k. 10n. 10p.
10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a 10j. Total number eligible 10k. Total number in family 10n. Eligible subsidy (10i ÷ 10k) X 10j 10p. Mixed family TTP: 10h minus 10n	If positive or 0, put tenant rent	\$ \$ \$ \$	10i. 10j. 10k.

12. Housing Choice Vouchers: Tenant Based Vouchers

12. Housing Choice vouchers: Ter	Tarit Basca Voucilei					
12a. Number of bedrooms on Voucher		12a. 12b.				
12b. Is family now moving to this unit? (Y or N)	12b. Is family now moving to this unit? (Y or N)					
12d. Did family move into your PHA jurisdiction		12d.				
(if no, skip to 12g)						
12e. Cost billed per month (put 0 if absorbed)		\$	12e.			
12f. PHA code billed			12f.			
	orate gross rent) [] Own manuf	actured home, lease space				
[] SRO: 1 room occ	cupied by 1 person		104			
12h. Owner name			12h.			
12i Owner TIN/SSN		Φ.	12i.			
12j. Payment standard for the family		\$	12j.			
12k. Rent to owner		\$	12k.			
12l Is the family receiving a higher payment sta	andard as a reasonable	\$	121.			
accommodation? (Y or N)						
12m. Utility allowance, if any		\$	12m.			
12n. Security deposit paid by the PHA on beha	If of the family, if any	\$	12n.			
12o. Mobility-related services			120(1).			
(1) Did the family receive mobility-related s			12o(2).			
(2) Date family began receiving mobility-re						
12p. Gross rent of unit: 12k + 12m (or Space R	lent)	\$	12p.			
12q. Lower of 12j or 12p		\$	12q.			
10r TTD: copy from 0i	\$	12r.				
12r. TTP: copy from 9j						
12s. Total HAP: 12q minus 12r		\$	12s.			
	ıb)					
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a	ab)	\$	12s.			
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s	ıb)	\$	12s. 12t.			
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s	ab)	\$ \$ \$	12s. 12t. 12u.			
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u		\$ \$ \$ \$	12s. 12t. 12u. 12v.			
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus		\$ \$ \$	12s. 12t. 12u.			
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m		\$ \$ \$ \$	12s. 12t. 12u. 12v.			
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12w.			
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12w.			
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w.			
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad.			
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae.			
Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Prorated total HAP: 12ab X 12ae	12u, but do not exceed not exceed 12p	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af.			
Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p	12u, but do not exceed not exceed 12p	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag.			
Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m	12u, but do not exceed not exceed 12p o minus 12af	\$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ag.			
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag	12u, but do not exceed not exceed 12p minus 12af If positive or 0, put	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag.			
Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m	12u, but do not exceed not exceed 12p minus 12af If positive or 0, put tenant rent	\$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah. 12ai.			
Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag minus 12ah	12u, but do not exceed not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant	\$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah. 12ai.			
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag	12u, but do not exceed not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant	\$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ag. 12ah. 12ai.			
Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag minus 12ah	12u, but do not exceed not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant	\$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah. 12ai.			
Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag minus 12ah 12aj. Prorated HAP to owner: 12k minus 12ai. If	12u, but do not exceed not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant f 12ai is negative, put 12k	\$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah. 12ai.			

Case Studies

Case Study 3: Crimson Family

• **Situation:** The PHA is conducting an interim for the Crimson family based on Ms. Crimson's timely reporting of new child support income. Five months ago, the PHA conducted an annual recertification for the Crimsons. The reporting of newly awarded child support is the only income change the Crimsons have experienced since their recertification.

• Family information:

Relation	Name	Age	Disabled
Head	Cherry Crimson	53	Y
Youth	Cameron Crimson	12	Y

- Ms. Crimson has a savings account worth \$29,180, earning \$627 in interest. She also has a checking account worth \$1,890, earning \$9 in interest. Cameron has a savings account worth \$19,002, earning \$428.
- Ms. Crimson works part-time earning \$860 semimonthly. Ms. Crimson reported last week that she was awarded, and has started to receive, child support in the amount of \$150 per week. Cameron receives SSI in the amount of \$550 per month.
- The family does not qualify for a health and medical care expense hardship. Ms. Crimson's annual unreimbursed prescription costs were calculated to be \$600, and she pays a long-term care premium of \$75 per month. Cameron's annual out-of-pocket health and medical care expenses are expected to be \$2,800.

HCV Unit information:

- Unit size: 2-bedroom

Voucher size: 2-bedroomRent to owner: \$1,475

- 2-bedroom payment standard: \$1.450

- 2-bedroom utility allowance: \$110

• Public Housing Unit information:

- Unit size: 2-bedroom

Flat rent: \$1,550

2-bedroom utility allowance: \$100

PHA policy:

- The PHA's minimum rent is \$50

6. Assets

6a. Family Member Name	No.	6b. Type of asset	6c. Is this asset included in net family assets?	6d. Cash v	alue of asset	6e. Acti	ual Income	6f. Imput	ed Income
		asset		\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
6g, 6h, 6i. Total net family assets, total actual income, total imputed income		\$	6g.	\$	6h.	\$	6i.		
6j. Passbook rate	(writte	n as deci	mal)			•			6j.
6k. Final asset in	come:	6h + 6i (see instruction bookle	t)					6k.

7. Income

7a. Family Member Name	No.	7b. Income Code	7c. Calculation (PHA use)	7d. Dollars per year	7e. Income exclusions	7f. Income after exclusions
						(7d minus 7e)
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
7g. Column total			I	1		\$ 7g.
7h. Reserved						
7i. Total annual income: 6k	(+ 7g					7i.
Over-Income Status (Pub						
7j. What is the applicable of						\$ 7j.
7k. Is the family's annual in					[] N	7k.
7l. If the family is over-incor	ne, not	e the start	date of the 24 cor	nsecutive month grace p	period	71.

8. Deductions and Allowances

8a. Total annual income: copy from 7i			\$	8a.
Permissive Deductions				
8b. Family Member Name	No.	8c. Type of permissive deduction	 Amount	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
8e. Total permissive deductions (sum of			\$	8e.
If head/spouse/co-head is under 62 a		nily member is disabled, skip to 8I		
8f. Medical/disability threshold: 8a X 0.			\$	8f.
		ce expense (if no disability expenses, skip to 8k)	\$	8g.
8h. Maximum disability allowance: If 8g	minus 8f	is positive or zero, put amount	\$	8h.
		ative and head/spouse/co-head is under 62 and not led, put 0	\$	8h.
		ative and head/spouse/co-head is elderly or disabled, copy	\$	8h.
8i. Earnings in 7d made possible by dis	\$	8i.		
		of 8h or 8i (if 8g is less than 8f and head/spouse/co-head	\$	8j.
	nedical ex	penses (if head/spouse/co-head under 62 and not disabled,	\$	8k.
8l. Family is eligible for medical or child	care expe	nse hardship or both?		81.
		al expense: 8j + 8k (if no disability expenses, copy from 8k)	\$	8m.
8n. Medical/disability assistance deduction:	If no	disability assistance expenses or if 8g is less than 8f, put inus 8f (if 8m minus 8f is negative, put zero)	\$	8n.
	If disa	ability assistance expenses and 8g is greater than or equal copy from 8m	\$	8n.
8p. Elderly/disability allowance	II.		\$	8p.
8q. Number of dependents (people und household, spouse, co-head, foster child		with disability, or full-time student. Do not count head of live-in aide.)		8q.
8r. Allowance per dependent	,	,	\$	8r.
8s. Dependent allowance: 8q X 8r			\$	8s.
8t. Total annual unreimbursed child car	e costs		\$	8t.
8x. Total allowances: 8e + 8n + 8p + 8s			\$	8x.
8y. Adjusted annual income: 8a minus		larger, put 0)	\$	8y.

9. Total Tenant Payment (TTP)

9a. Total monthly income: 8a ÷ 12	\$ 9a.
9c. TTP if based on annual income: 9a X 0.10	\$ 9c.
9d. Adjusted monthly income: 8y ÷ 12	\$ 9d.
9e. Percentage of adjusted monthly income	\$ 9e.
9f. TTP if based on adjusted annual income: (9d X 9e) ÷ 100	\$ 9f.
9g. Welfare rent per month (if none, put 0)	\$ 9g.
9h. Minimum rent (if waived, put 0)	\$ 9h.
9i. Enhanced Voucher minimum rent	\$ 9i.
9j. TTP, highest of lines 9c, 9f, 9g, 9h, or 9i	\$ 9j.
9k. Most recent TTP	\$ 9k.
9m. Qualify for minimum rent hardship exemption? (Y or N)	\$ 9m.

10. Public Housing

	\$	10a.
	\$	10b.
ceiling rents; or if not, put 10a)	\$	10d.
	\$	10e.
If positive or 0, put tenant rent	\$	10f.
If negative, credit tenant	\$	10f.
		1011.
	\$	10h.
	\$	10i.
	<u> </u>	10i.
	\$	
	\$	10i. 10j.
	\$ \$	10i. 10j. 10k.
	\$ \$ \$	10i. 10j. 10k. 10n.
If positive or 0, put tenant rent	\$ \$ \$ \$	10i. 10j. 10k. 10n. 10p.
	rent	ceiling rents; or if not, put 10a) \$ If positive or 0, put tenant rent If negative, credit tenant \$ o 10u)

12. Housing Choice Vouchers: Tenant Based Vouchers

12. Housing	f bedrooms on Voucher			120
				12a.
120. IS lamily n	ow moving to this unit? (Y or N)	· · · · · · · · · · · · · · · · · · ·		12b.
	move into your PHA jurisdiction		12d.	
(if no, skip to 12g	9)			
12e. Cost billed	per month (put 0 if absorbed)	\$	12e.	
12f. PHA code			7	12f.
12g. Housing ty		orate gross rent) [] Own manuf	actured home, lease space	 -
0 0,	[] SRO: 1 room occ		•	
12h. Owner nar				12h.
12i Owner TIN	I/SSN			12i.
12j. Payment s	standard for the family		\$	12j.
12k. Rent to ow	vner		\$	12k.
12l Is the fami	ily receiving a higher payment sta	andard as a reasonable	\$	121.
accommodation?				
12m. Utility allo			\$	12m.
	deposit paid by the PHA on beha	If of the family, if any	\$	12n.
12o. Mobility-re		,		120(1).
	e family receive mobility-related s	services? (Y or N)		12o(2).
	amily began receiving mobility-re			- ()
	nt of unit: 12k + 12m (or Space R		\$	12p.
12q. Lower of			\$	12q.
			12r.	
	r from 9i		3	
12r. TTP: copy 12s. Total HAP			\$	12s.
12r. TTP: copy 12s. Total HAP Rent Calculation	: 12q minus 12r on (if prorated rent, skip to 12a	b)	\$	12s.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family	: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s	b)	\$	12s. 12t.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to ow	: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s vner: lower of 12k or 12s	b)	\$ \$ \$	12s. 12t. 12u.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to ow 12v. Tenant ren	: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s wner: lower of 12k or 12s nt to owner: 12k minus 12u	<u>, </u>	\$ \$ \$	12s. 12t. 12u. 12v.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to ow 12v. Tenant ren 12w. Utility reim	: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s vner: lower of 12k or 12s	<u>, </u>	\$ \$ \$	12s. 12t. 12u.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to ow 12v. Tenant ren	: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s wner: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus	<u>, </u>	\$ \$ \$	12s. 12t. 12u. 12v.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to ow 12v. Tenant rer 12w. Utility reim 12m	: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s wher: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus Calculation	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12v.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to ow 12v. Tenant rer 12w. Utility reim 12m Prorated Rent of 12ab. Normal to	e: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s yner: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus Calculation otal HAP: copy from 12s, but do	12u, but do not exceed	\$ \$ \$	12s. 12t. 12u. 12v. 12w.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to ow 12v. Tenant rer 12w. Utility reim 12m Prorated Rent of 12ab. Normal to 12ac. Total num	e: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s yner: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus Calculation otal HAP: copy from 12s, but do in otal HAP: do ynber eligible	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12w. 12ab. 12ac.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to ow 12v. Tenant rer 12w. Utility reim 12m Prorated Rent of 12ab. Normal to 12ac. Total num 12ad. Total num	e: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s wher: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus Calculation otal HAP: copy from 12s, but do a mber eligible mber in family	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to ow 12v. Tenant rer 12w. Utility reim 12m Prorated Rent of 12ab. Normal to 12ac. Total num 12ad. Total num 12ae. Proration	e: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s yner: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus Calculation otal HAP: copy from 12s, but do not be eligible mber in family percentage: 12ac ÷ 12ad	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to ow 12v. Tenant rer 12w. Utility reim 12m Prorated Rent of 12ab. Normal to 12ac. Total num 12ad. Total num 12ae. Prorated 12af. Prorated	e: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s wher: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus Calculation otal HAP: copy from 12s, but do not on the ligible mber in family percentage: 12ac ÷ 12ad total HAP: 12ab X 12ae	12u, but do not exceed not exceed 12p	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to own 12v. Tenant rer 12w. Utility reim 12m Prorated Rent of 12ab. Normal to 12ac. Total num 12ad. Total num 12ad. Total num 12ae. Prorated 12ag. Mixed family	: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s wher: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus Calculation otal HAP: copy from 12s, but do noter eligible mber in family percentage: 12ac ÷ 12ad total HAP: 12ab X 12ae mily total family contribution: 12p	12u, but do not exceed not exceed 12p	\$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12af.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to own 12v. Tenant rer 12w. Utility reim 12m Prorated Rent of the second	: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s wher: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus Calculation otal HAP: copy from 12s, but do noter eligible mber in family percentage: 12ac ÷ 12ad total HAP: 12ab X 12ae mily total family contribution: 12p owance: copy from 12m	not exceed 12p	\$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12af.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to own 12v. Tenant rer 12w. Utility reim 12m Prorated Rent 12ab. Normal to 12ac. Total num 12ad. Total num 12ad. Total num 12ae. Prorated 12ag. Mixed far 12ah. Utility allo 12ai. Mixed far	: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s wher: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus Calculation otal HAP: copy from 12s, but do noter eligible mber in family percentage: 12ac ÷ 12ad total HAP: 12ab X 12ae mily total family contribution: 12p	not exceed 12p minus 12af If positive or 0, put	\$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12af.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to own 12v. Tenant rer 12w. Utility reim 12m Prorated Rent of the second	: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s wher: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus Calculation otal HAP: copy from 12s, but do noter eligible mber in family percentage: 12ac ÷ 12ad total HAP: 12ab X 12ae mily total family contribution: 12p owance: copy from 12m	not exceed 12p minus 12af If positive or 0, put tenant rent	\$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah. 12ai.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to own 12v. Tenant ren 12m. Utility reim 12m Prorated Rent 12ab. Normal to 12ac. Total nun 12ad. Total nun 12ad. Total nun 12ae. Prorated 12ag. Mixed fan 12ah. Utility allo 12ai. Mixed fan minus 12ah	e: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s y share: 12s minus 12s to owner: 12k minus 12u shursement to family: 12s minus Calculation otal HAP: copy from 12s, but do on otal HAP: copy from 12s, but do on otal HAP: 12ab X 12ae mily total family contribution: 12p owance: copy from 12m mily tenant rent to owner: 12ag	not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah. 12ai.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to ow 12v. Tenant rer 12w. Utility reim 12m Prorated Rent of 12ab. Normal to 12ac. Total num 12ad. Total num 12ad. Total num 12ae. Prorated 12ag. Mixed family 12ai. Prorated I	c 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s yner: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus Calculation otal HAP: copy from 12s, but do noter eligible mber in family percentage: 12ac ÷ 12ad total HAP: 12ab X 12ae mily total family contribution: 12p owance: copy from 12m mily tenant rent to owner: 12ag HAP to owner: 12k minus 12ai. If	not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant	\$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah. 12ai.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to ow 12v. Tenant rer 12w. Utility reim 12m Prorated Rent of 12ab. Normal to 12ac. Total num 12ad. Total num 12ad. Total num 12ae. Prorated 12ag. Mixed far 12ah. Utility allo 12ai. Mixed far minus 12ah	e: 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s y share: 12s minus 12s to owner: 12k minus 12u shursement to family: 12s minus Calculation otal HAP: copy from 12s, but do on otal HAP: copy from 12s, but do on otal HAP: 12ab X 12ae mily total family contribution: 12p owance: copy from 12m mily tenant rent to owner: 12ag	not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah. 12ai.
12r. TTP: copy 12s. Total HAP Rent Calculation 12t. Total family 12u. HAP to own 12v. Tenant rer 12w. Utility reim 12m Prorated Rent 12ab. Normal to 12ac. Total nun 12ad. Total nun 12ad. Total nun 12ad. Prorated 12ag. Mixed far 12ah. Utility allo 12ai. Mixed far minus 12ah 12aj. Prorated I Additional Payon 12ap. Additional	c 12q minus 12r on (if prorated rent, skip to 12a y share: 12p minus 12s yner: lower of 12k or 12s nt to owner: 12k minus 12u bursement to family: 12s minus Calculation otal HAP: copy from 12s, but do noter eligible mber in family percentage: 12ac ÷ 12ad total HAP: 12ab X 12ae mily total family contribution: 12p owance: copy from 12m mily tenant rent to owner: 12ag HAP to owner: 12k minus 12ai. If	not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant 12ai is negative, put 12k	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ag. 12aj. 12ai.

Case Studies

Case Study 4: Dijon Family

• **Situation:** It's December and the PHA is processing a new admission for the Dijon family. The effective date of the new admission will be January 1.

• Family information:

Relation	Name	Age	Disabled
Head	Duke Dijon	47	N
Spouse	Dita Dijon	44	Y
Youth	Delilah Dijon	12	N
Youth	Dane Dijon	10	Y

- Duke recently sold the condo he owned to his brother for \$25,000. The property was valued at \$50,000 and had a mortgage balance of \$10,000. His brother paid all the transfer fees. Duke spent \$15,000 on a new vehicle and the remaining \$10,000 was invested in a certificate of deposit (CD) that pays 3% interest annually and has a penalty for early withdrawal of \$500.
- Dita reported that she has a savings account worth \$750 that earns \$8 in interest. Duke and Dita have a non-interest-bearing joint checking account worth \$1,225.
- Dita receives \$1,000 per month in Social Security disability benefits, but \$175 per month is deducted for her Medicare premium. In October, the SSA announced a COLA of 4.7% for all recipients which takes effect on January 1. The Medicare deduction will stay the same.
- Duke lost his job in November and receives \$400 per week in unemployment.
- The family has \$20 per month in eligible unreimbursed health and medical care expenses for Duke. Delilah has \$360 per year in eligible out-of-pocket expenses. Dane's average monthly health and medical care expenses are \$500, but they are entirely reimbursed by a state disability program.
- Dita is a full-time student, paying \$70 per week total for both children. Dane and Delilah to be in an after-school program which enables her to attend school 40 weeks out of the year. The PHA has verified the child care cost is reasonable.

HCV and Public Housing Rent Calculation HOTMA

Case Studies

• HCV Unit information:

- Unit size: 3-bedroom

- Voucher size: 3-bedroom

- Rent to owner: \$1,825

- 3-bedroom payment standard: \$1,755

- 3-bedroom utility allowance: \$150

• Public Housing Unit information:

- Unit size: 3-bedroom

- 3-bedroom flat rent: \$1,755

- 3-bedroom utility allowance: \$150

• PHA policy:

- The PHA's minimum rent is \$0

Head of household name			Social Se	curity N	umber		Date modified (mm/	dd/yyyy)	
6. Assets									
6a. Family member name		No.	6b. Type of asset	6c. Ca	alculation (PHA use)	6d. (Cash value of asset	6e. Anticipated	
						\$		\$	
						\$		\$	
						\$		\$	
						\$		\$	
						\$		\$	
						\$		\$	
						\$		\$	
						\$		\$	
6f, 6g. Column totals						\$	6f.	\$	6g.
6h. Passbook rate (written	as decim	al)			<u>, ~ </u>	31.	0.	6h.
6i. Imputed asset in				n or le	ess nut (1)			\$	6i.
6j. Final asset inco				<i>70 01 10</i>	, par 0)			\$	6j.
7. Income	TIO. IGI	901 01 09	01 01					Ψ	<u> </u>
7a. Family member name	No.	7b. Income Code	7c. Calcula (PHA use)	ation	7d. Dollars per year	7e. l	ncome exclusions	7f. Income after exclusions	
		Code						(7d minus 7e)	
					\$	\$		\$	
					\$	\$		\$	
					\$	\$		\$	
					\$	\$		\$	
					\$	\$		\$	
					\$	\$		\$	
					\$	\$		\$	
					\$	\$		\$	
					\$	\$		\$	
					\$	\$		\$	
					\$	\$		\$	
					\$	\$		\$	
7g. Column total								\$	7g.
7h. Reserved								ı	
7i. Total annual incon	ne: 6j +	· 7g	Welf				Other Inc C.	\$	7i.
7b: Income Codes Wages: B = own business F = federal wage HA = PHA wage M = military pay W = other wage			Welfare: G = genera IW = annua T = TANF a SS/SSI/Per P = pension S = SSI	al impute assistand nsions:	d welfare income		Other Income Source C = child support E = medical reimburse I = Indian trust/per cap N = other nonwage sou U = unemployment bei	ment ita urces	

SS/SSI/Pensions: P = pension S = SSI SS = Social Security

8. Deductions and Allowances

8a. Total annual income: copy from 7i			\$	8a.		
Permissive Deductions						
8b. Family Member Name	No.	8c. Type of permissive deduction	8d. Amount			
			\$			
			\$			
			\$			
			\$			
			\$			
			\$			
8e. Total permissive deductions (sum			\$	8e.		
If head/spouse/co-head is under 62 a	and no fan	nily member is disabled, skip to 8l				
8f. Medical/disability threshold: 8a X 0.			\$	8f.		
		ce expense (if no disability expenses, skip to 8k)	\$	8g.		
8h. Maximum disability allowance: If 8			\$	8h.		
		ative and head/spouse/co-head is under 62 and not led, put 0	\$	8h.		
	If neg	ative and head/spouse/co-head is elderly or disabled, copy	\$	8h.		
8i. Earnings in 7d made possible by di			\$	8i.		
		of 8h or 8i (if 8g is less than 8f and head/spouse/co-head	\$	8j.		
	medical ex	penses (if head/spouse/co-head under 62 and not disabled,	\$	8k.		
8l. Family is eligible for medical or child	care expe	nse hardshin or both?		81.		
		al expense: 8j + 8k (if no disability expenses, copy from 8k)	\$	8m.		
8n. Medical/disability assistance deduction:	If no o	disability assistance expenses or if 8g is less than 8f, put inus 8f (if 8m minus 8f is negative, put zero)	\$	8n.		
	If disa	ability assistance expenses and 8g is greater than or equal copy from 8m	\$	8n.		
8p. Elderly/disability allowance	8p. Elderly/disability allowance					
8q. Number of dependents (people unhousehold, spouse, co-head, foster chi		with disability, or full-time student. Do not count head of live-in aide.)		8q.		
8r. Allowance per dependent	,	,	\$	8r.		
8s. Dependent allowance: 8g X 8r			\$	8s.		
8t. Total annual unreimbursed child ca	re costs		\$	8t.		
8x. Total allowances: 8e + 8n + 8p + 8	s + 8t		\$	8x.		
8y. Adjusted annual income: 8a minus	8x (if 8x is	larger, put 0)	\$	8y.		

9. Total Tenant Payment (TTP)

9a. Total monthly income: 8a ÷ 12	\$ 9a.
9c. TTP if based on annual income: 9a X 0.10	\$ 9c.
9d. Adjusted monthly income: 8y ÷ 12	\$ 9d.
9e. Percentage of adjusted monthly income	\$ 9e.
9f. TTP if based on adjusted annual income: (9d X 9e) ÷ 100	\$ 9f.
9g. Welfare rent per month (if none, put 0)	\$ 9g.
9h. Minimum rent (if waived, put 0)	\$ 9h.
9i. Enhanced Voucher minimum rent	\$ 9i.
9j. TTP, highest of lines 9c, 9f, 9g, 9h, or 9i	\$ 9j.
9k. Most recent TTP	\$ 9k.
9m. Qualify for minimum rent hardship exemption? (Y or N)	\$ 9m.

10. Public Housing

10a. TTP: copy from 9j		\$	10a.
10b. Unit's flat rent		\$	10b.
Income Based Rent Calculation (if prorated rent, skip to 10h)			
10d. Income Based Rent (Lower of 10a or 10b if authorized to us	se ceiling rents; or if not, put 10a)	\$	10d.
10e. Utility allowance, if any	•	\$	10e.
10f. Tenant rent: 10d minus 10e	If positive or 0, put tenant rent	\$	10f.
	If negative, credit tenant	\$	10f.
10i. Family maximum subsidy: 10h minus 10a10j. Total number eligible		\$	10i. 10j.
10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a		\$ \$	10h. 10i.
10k. Total number in family		\$	10k.
10n. Eligible subsidy (10i ÷ 10k) X 10j		\$	10n.
10p. Mixed family TTP: 10h minus 10n		\$	10p.
10r. Utility allowance, if any		\$	10r.
10s. Mixed family tenant rent: 10p minus 10r	If positive or 0, put tenant rent	\$	10s.
	If negative, credit tenant	\$	10s.
Type of Rent	If negative, credit tena	ınt	ınt \$
10u. Type of rent selected: [] Income-based [] Flat			

12. Housing Choice Vouchers: Tenant Based Vouchers

12. Housing Choice Vouchers: Ter	iant Basea Voacher	<u> </u>	120	
			12a.	
12b. Is family now moving to this unit? (Y or N)	under resultability () (V ex NI)		12b.	
12d. Did family move into your PHA jurisdiction	under portability? (Y or N)		12d.	
(if no, skip to 12g)				
12e. Cost billed per month (put 0 if absorbed)		\$	12e.	
12f. PHA code billed		7	12f.	
	orate gross rent) [] Own manuf	actured home, lease space	 -	
[] SRO: 1 room occ		,		
12h. Owner name			12h.	
12i Owner TIN/SSN			12i.	
12j. Payment standard for the family		\$	12j.	
12k. Rent to owner		\$	12k.	
12l Is the family receiving a higher payment sta	andard as a reasonable	\$	121.	
accommodation? (Y or N)				
12m. Utility allowance, if any		\$	12m.	
12n. Security deposit paid by the PHA on behal	If of the family, if any	\$	12n.	
12o. Mobility-related services			120(1).	
(1) Did the family receive mobility-related s	services? (Y or N)		12o(2).	
(2) Date family began receiving mobility-re			- ()	
12p. Gross rent of unit: 12k + 12m (or Space R		\$	12p.	
12q. Lower of 12j or 12p	,	\$	12q.	
	\$	12r.		
12r. TTP: copy from 9i				
12r. TTP: copy from 9j 12s. Total HAP: 12q minus 12r		\$	12s.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a	b)	\$	12s.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s	ıb)	\$	12s. 12t.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s	ıb)	\$ \$ \$	12s. 12t. 12u.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u	<u>, </u>	\$ \$ \$	12s. 12t. 12u. 12v.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus	<u>, </u>	\$ \$ \$	12s. 12t. 12u.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m	<u>, </u>	\$ \$ \$	12s. 12t. 12u. 12v.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12v.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do it	12u, but do not exceed	\$ \$ \$	12s. 12t. 12u. 12v. 12w.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 112ac. Total number eligible	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12w. 12w.	
Prorated Rent Calculation 12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad	12u, but do not exceed	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae.	
Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Prorated total HAP: 12ab X 12ae	12u, but do not exceed not exceed 12p	\$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af.	
Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p	12u, but do not exceed not exceed 12p	\$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m	12u, but do not exceed not exceed 12p minus 12af	\$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ag.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag	not exceed 12p minus 12af If positive or 0, put	\$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m	not exceed 12p minus 12af If positive or 0, put tenant rent	\$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ag. 12ah. 12ai.	
Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag minus 12ah	12u, but do not exceed not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah.	
12s. Total HAP: 12q minus 12r Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag	12u, but do not exceed not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant	\$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ag. 12ah. 12ai.	
Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag minus 12ah	12u, but do not exceed not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ag. 12ah. 12ai.	
Rent Calculation (if prorated rent, skip to 12a 12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag minus 12ah 12aj. Prorated HAP to owner: 12k minus 12ai. If	12u, but do not exceed not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant f 12ai is negative, put 12k	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	12s. 12t. 12u. 12v. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12as. 12as. 12as. 12as.	

Case Studies

Case Study 5: Flamingo Family

• **Situation:** An annual reexamination is being processed for the Flamingo family.

• Family information:

Relation	Name	Age	Disabled
Head	Fiona Flamingo	36	N
Youth	Feivel Flamingo	12	Y

- Fiona has a savings account worth \$20,000 that earns \$100 in interest.
- Feivel has a checking account worth \$1,900 that earns \$10.
- Feivel receives \$950 per month in SSI.
- Because she takes care of Feivel full-time at home, Fiona receives \$5,500 per month from the state Medicaid office. Fiona is not employed outside of the home.

• HCV Unit information:

- Unit size: 2-bedroom

Voucher size: 2-bedroomRent to owner: \$1,500

2-bedroom payment standard: \$1,5252-bedroom utility allowance: \$135

Public Housing Unit information:

- Flat rent: \$1,525

- Bedroom utility allowance: \$135

• PHA policy:

- The PHA's minimum rent is \$0

6. Assets

6a. Family Member Name	No.	6b. Type of asset	6c. Is this asset included in net family assets?	6d. Cash va	alue of asset	6e. Actu	ual Income	6f. Imput	ed Income
		asset		\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
				\$		\$		\$	
6g, 6h, 6i. Total notal imputed inco		y assets,	total actual income,	\$	6g.	\$	6h.	\$	6i.
6j. Passbook rate	(writte	n as deci	mal)	•		•			6j.
6k. Final asset in	come:	6h + 6i (see instruction bookle	t)					6k.

7. Income

7a. Family Member Name	No.	7b. Income Code	7c. Calculation (PHA use)	7d. Dollars per year	7e. Income exclusions	7f. Income after exclusions
		0000				(7d minus 7e)
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
				\$	\$	\$
7g. Column total		1				\$ 7g.
7h. Reserved						
7i. Total annual income: 6k	(+ 7g					7i.
Over-Income Status (Pub	lic Hou	sing Only)			
7j. What is the applicable of						\$ 7j.
7k. Is the family's annual in					[] N	7k.
7l. If the family is over-incor	ne, not	e the start	date of the 24 cor	nsecutive month grace p	period	71.

8. Deductions and Allowances

8a. Total annual income: copy from 7i			\$	8a.
Permissive Deductions				
8b. Family Member Name	No.	8c. Type of permissive deduction	8d. Amount	
			\$	
			\$	
			\$	
			\$	
			\$	
			\$	
8e. Total permissive deductions (sum			\$	8e.
If head/spouse/co-head is under 62 a	and no fan	nily member is disabled, skip to 8l		
8f. Medical/disability threshold: 8a X 0.			\$	8f.
		ce expense (if no disability expenses, skip to 8k)	\$	8g.
8h. Maximum disability allowance: If 8			\$	8h.
		ative and head/spouse/co-head is under 62 and not led, put 0	\$	8h.
	If neg	ative and head/spouse/co-head is elderly or disabled, copy	\$	8h.
8i. Earnings in 7d made possible by di			\$	8i.
		of 8h or 8i (if 8g is less than 8f and head/spouse/co-head	\$	8j.
	medical ex	penses (if head/spouse/co-head under 62 and not disabled,	\$	8k.
8l. Family is eligible for medical or child	care expe	nse hardshin or both?		81.
		al expense: 8j + 8k (if no disability expenses, copy from 8k)	\$	8m.
8n. Medical/disability assistance deduction:	If no o	disability assistance expenses or if 8g is less than 8f, put inus 8f (if 8m minus 8f is negative, put zero)	\$	8n.
	If disa	ability assistance expenses and 8g is greater than or equal copy from 8m	\$	8n.
8p. Elderly/disability allowance	"		\$	8p.
8q. Number of dependents (people unhousehold, spouse, co-head, foster chi		with disability, or full-time student. Do not count head of live-in aide.)		8q.
8r. Allowance per dependent	,	,	\$	8r.
8s. Dependent allowance: 8g X 8r			\$	8s.
8t. Total annual unreimbursed child ca	re costs		\$	8t.
8x. Total allowances: 8e + 8n + 8p + 8	s + 8t		\$	8x.
8y. Adjusted annual income: 8a minus	8x (if 8x is	larger, put 0)	\$	8y.

9. Total Tenant Payment (TTP)

9a. Total monthly income: 8a ÷ 12	\$ 9a.
9c. TTP if based on annual income: 9a X 0.10	\$ 9c.
9d. Adjusted monthly income: 8y ÷ 12	\$ 9d.
9e. Percentage of adjusted monthly income	\$ 9e.
9f. TTP if based on adjusted annual income: (9d X 9e) ÷ 100	\$ 9f.
9g. Welfare rent per month (if none, put 0)	\$ 9g.
9h. Minimum rent (if waived, put 0)	\$ 9h.
9i. Enhanced Voucher minimum rent	\$ 9i.
9j. TTP, highest of lines 9c, 9f, 9g, 9h, or 9i	\$ 9j.
9k. Most recent TTP	\$ 9k.
9m. Qualify for minimum rent hardship exemption? (Y or N)	\$ 9m.

10. Public Housing

10a. TTP: copy from 9j		\$	10a.
10b. Unit's flat rent		\$	10b.
Income Based Rent Calculation (if prorated rent, skip to 10h)			
10d. Income Based Rent (Lower of 10a or 10b if authorized to us	se ceiling rents; or if not, put 10a)	\$	10d.
10e. Utility allowance, if any	•	\$	10e.
10f. Tenant rent: 10d minus 10e	If positive or 0, put tenant rent	\$	10f.
	If negative, credit tenant	\$	10f.
10i. Family maximum subsidy: 10h minus 10a10j. Total number eligible		\$	10i. 10j.
10h. PHA-established flat rent 10i. Family maximum subsidy: 10h minus 10a		\$ \$	10h. 10i.
10k. Total number in family		\$	10k.
10n. Eligible subsidy (10i ÷ 10k) X 10j		\$	10n.
10p. Mixed family TTP: 10h minus 10n		\$	10p.
10r. Utility allowance, if any		\$	10r.
10s. Mixed family tenant rent: 10p minus 10r	If positive or 0, put tenant rent	\$	10s.
	If negative, credit tenant	\$	10s.
Type of Rent	If negative, credit tena	ınt	ınt \$
10u. Type of rent selected: [] Income-based [] Flat			

12. Housing Choice Vouchers: Tenant Based Vouchers

12a. Number of bedrooms on Voucher			12a.
12b. Is family now moving to this unit? (Y or N)			12b.
12d. Did family move into your PHA jurisdiction	under portability? (Y or N)		12d.
(if no, skip to 12g)	and portability. (1 of 14)		124.
12e. Cost billed per month (put 0 if absorbed)		\$	12e.
12f. PHA code billed		Ψ	126. 12f.
	orate gross rent) [] Own manuf	actured home leads and a	121.
[] SRO: 1 room occ		actured nome, lease space	
12h. Owner name	, , ,		12h.
12i Owner TIN/SSN			12i.
12j. Payment standard for the family		\$	12j.
12k. Rent to owner		\$	12k.
12I Is the family receiving a higher payment sta	andard as a reasonable	\$	12l.
accommodation? (Y or N)			
12m. Utility allowance, if any		\$	12m.
12n. Security deposit paid by the PHA on beha	If of the family, if any	\$	12n.
12o. Mobility-related services	7,		12o(1).
(1) Did the family receive mobility-related s	services? (Y or N)		120(2).
(2) Date family began receiving mobility-re			. = = (=).
12p. Gross rent of unit: 12k + 12m (or Space R		\$	12p.
12q. Lower of 12j or 12p	,	\$	12q.
12r. TTP: copy from 9j		\$	12r.
12s. Total HAP: 12q minus 12r		\$	12s.
Rent Calculation (if prorated rent, skip to 12a	b)		
12t. Total family share: 12p minus 12s	(b)	\$	12t.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s	b)	\$	12t. 12u.
12t. Total family share: 12p minus 12s	b)		
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s		\$	12u.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u		\$	12u. 12v.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus		\$	12u. 12v.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do	12u, but do not exceed	\$	12u. 12v.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible	12u, but do not exceed	\$ \$ \$	12u. 12v. 12w.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do	12u, but do not exceed	\$ \$ \$	12u. 12v. 12w.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family	12u, but do not exceed	\$ \$ \$	12u. 12v. 12w. 12ab. 12ac.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible	12u, but do not exceed	\$ \$ \$	12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae	12u, but do not exceed not exceed 12p	\$ \$ \$	12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p	12u, but do not exceed not exceed 12p	\$ \$ \$ \$ \$	12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m	not exceed 12p	\$ \$ \$ \$ \$ \$ \$	12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag	not exceed 12p minus 12af If positive or 0, put	\$ \$ \$ \$ \$	12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m	not exceed 12p minus 12af If positive or 0, put tenant rent	\$ \$ \$ \$ \$ \$ \$	12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag minus 12ah	not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant	\$ \$ \$ \$ \$ \$ \$	12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah. 12ai.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag minus 12ah	not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant	\$ \$ \$ \$ \$ \$ \$	12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag minus 12ah 12aj. Prorated HAP to owner: 12k minus 12ai. It	not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant f 12ai is negative, put 12k	\$ \$ \$ \$ \$ \$ \$ \$	12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah. 12ai.
12t. Total family share: 12p minus 12s 12u. HAP to owner: lower of 12k or 12s 12v. Tenant rent to owner: 12k minus 12u 12w. Utility reimbursement to family: 12s minus 12m Prorated Rent Calculation 12ab. Normal total HAP: copy from 12s, but do 12ac. Total number eligible 12ad. Total number in family 12ae. Proration percentage: 12ac ÷ 12ad 12af. Prorated total HAP: 12ab X 12ae 12ag. Mixed family total family contribution: 12p 12ah. Utility allowance: copy from 12m 12ai. Mixed family tenant rent to owner: 12ag minus 12ah	not exceed 12p minus 12af If positive or 0, put tenant rent If negative, credit tenant f 12ai is negative, put 12k	\$ \$ \$ \$ \$ \$ \$	12u. 12v. 12w. 12ab. 12ac. 12ad. 12ae. 12af. 12ag. 12ah. 12ai.

Case Studies

Notes