

## Resident Rent Calculation Worksheet

|     |    |   |                                |
|-----|----|---|--------------------------------|
| (1) | \$ | - | Annual Income from all sources |
| (2) |    |   | Income Exclusions              |
| (3) | \$ | - | Annual Income                  |

### Calculating Adjusted Income

#### Dependent Allowance

|     |    |   |                          |
|-----|----|---|--------------------------|
| (4) |    |   | Number of Dependents     |
| (5) | \$ | - | Multiply Line 4 by \$480 |

#### Child Care Allowance

|     |  |  |  |
|-----|--|--|--|
| (6) |  |  | Anticipated Unreimbursed Expenses for Care of Children |
|-----|--|--|--|

#### Disabled Assistance Allowance

|      |    |   |   |
|------|----|---|---|
| (7)  |    |   | Disabled Assistance Expenses  |
| (8)  | \$ | - | Multiply Line 3 by 0.03   |
| (9)  | \$ | - | Subtract Line 8 from Line 7   |
| (10) |    |   | Family Member Earnings which were dependent on the disabled assistance expenses |
| (11) | \$ | - | Lesser of Lines 9 or 10   |

#### Medical Expenses/Elderly Family Allowances

|      |    |   |  |
|------|----|---|--|
| (12) |    |   | List Total for Medical Expenses  |
| (13) | \$ | - | If Line 9>0, enter amount from Line 12, otherwise add Line 7 and 12 and subtract Line 8. |
| (14) |    |   | Elderly/Disabled Allowance ( Enter \$400, if applicable)                                 |

#### Adjusted Income

|      |    |   |  |
|------|----|---|--|
| (15) | \$ | - | Total Income Adjustments (Add Lines 5, 6, 11,13, and 14) |
| (16) | \$ | - | Adjusted Income (Subtract Line 15 from Line 3)           |

#### Resident Rent Determination

|      |    |   |  |
|------|----|---|--|
| (17) | \$ | - | 30% of Monthly Adjusted Income (Divide Line 16 by 12 and multiply by 0.3)  |
| (18) | \$ | - | 10% of Monthly Income (Divide Line 3 by 12 and multiply by 0.1)  |
| (19) |    |   | Portion of welfare payment designated by the agency to meet the family's housing cost, if applicable.                          |
| (20) | \$ | - | Enter the Largest of Lines 17, 18 or 19.<br><b>This is the Maximum amount per month that may be charged for resident rent.</b> |

#### Determining Resident Rent for Units where Utilities are not included in Rent

|      |    |   |  |
|------|----|---|--|
| (21) |    |   | Utility Allowance  |
| (22) | \$ | - | Resident Rent (Subtract Line 21 from Line 20)  |
| (23) | \$ | - | Utility Reimbursement (Only if Line 22<0, This is the amount that must be paid <u>to</u> the resident as a utility reimbursement.) |

# Annual Income

## Annual income includes:

- (1) The full amount, before any payroll deductions, of wages and salaries, overtime pay, commissions, fees, tips and bonuses, and other compensation for personal services;
- (2) The full amount of periodic payments received from social security, annuities, insurance policies, retirement funds, pensions, disability or death benefits and other similar types of periodic receipts, including lump sum payment for delayed start of a periodic payment;
- (3) Payments in lieu of earnings, such as unemployment and disability compensation, worker's compensation and severance pay;
- (4) Welfare assistance. Welfare or other payments to families or individuals, based on need, that are made under program funded, separately or jointly, by Federal, State or local governments (e.g, Social Security Income (SSI) and general assistance available through state welfare programs);
- (5) Periodic and determinable allowances, such as alimony and child support payments, and regular contributions or gifts received from persons not residing in the dwelling;
- (6) Net income from the operation of a business or profession;
- (7) Interest, dividends, and other net income of any kind from real and personal property;
- (8) All regular pay, special pay and allowances of a member of the Armed Forces, except special hostile fire pay.

# Excluded Income

## Income That Must Be Excluded

Annual income does not include:

- (1) Income from employment of children (including foster children) under the age of 18 years;
- (2) Payments received for the care of foster children or foster adults (usually individuals with disabilities, unrelated to the tenant family, who are unable to live alone);
- (3) Lump-sum additions to family assets, such as inheritances, insurance payments (including payments under health and accident insurance and worker's compensation), capital gains, and settlement for personal or property;
- (4) Amounts received by the family, that are specifically for, or in reimbursement of, the cost of medical expenses for any family member;
- (5) Income of a live-in aide as defined in Sec. 813.102;
- (6) The full amount of student assistance paid directly to the student or to the educational institution;
- (7) Amounts received under training programs funded by HUD;
- (8) Amounts received by a disabled person that are disregarded for a limited time for purposes of SSI income eligibility and benefits because they are set aside for use under a Plan for Achieving Self-Support (PASS);  
or
- (9) Amounts received by a participant in other publicly assisted programs which are specifically for or in reimbursement of out-of-pocket expenses incurred (special equipment, clothing, transportation, child care, etc.) and which are made solely to allow participation in a specific program;
- (10) A resident service stipend. A resident service stipend is a modest amount (not to exceed \$200 per month) received by a resident for performing a service for the owner, on a part-time basis, that enhances the quality of life in the development. Such services may include, but are not limited to, fire patrol, hall monitoring lawn maintenance, and resident initiatives coordination. No resident may receive more than one such stipend during the same period of time;
- (11) Compensation from state or local employment training programs and training of a family member as resident management staff. Amounts excluded by this provision must be received under employment training programs with clearly defined goals and objectives, and are excluded only for a limited period as determined in advance;
- (12) Temporary, non-recurring or sporadic income (including gifts);
- (13) For all initial determinations and reexaminations of income carried out on or after April 23, 1993, reparation payments paid by a foreign government pursuant to claims filed under the laws of that government by persons who were persecuted during the Nazi era;
- (14) Earnings in excess of \$480 for each full time student 18 years old or older (excluding the head of household and spouse);
- (15) Adoption assistance payments in excess of \$480 per adopted child;
- (16) Deferred periodic payments of SSI income and social security benefits;
- (17) Amounts received by the family in the form of refunds or rebates under state or local law for property taxes paid on the dwelling unit;

## Excluded Income

- (18) Amounts paid by a State agency to a family with a developmentally disabled family member living at home to offset the cost of services and equipment needed to keep the developmentally disabled family member at home;
- (19) Amounts specifically excluded by any other federal statute from consideration as income for purposes of determining eligibility or benefits under a category of assistance programs that included assistance under the U.S. Housing Act of 1937:
  - (a) The value of the allotment provided to an eligible household under the Food Stamp Act of 1977 (7 U.S.C. 2017(b));
  - (b) Payments to volunteers under the Domestic Volunteer Service Act of 1973 (42 U.S.C. 5044, 5058);
  - (c) Payments received under the Alaska Native Claims Settlement Act (43 U.S.C. 1626);
  - (d) Income derived from certain submarginal land of the United States that is held in trust for certain Indian tribes (25 U.S.C. 459e);
  - (e) Payments or allowances made under the Department of Health and Human Services' Low-Income Home Energy Assistance Program (42 U.S.C. 8624(f));
  - (f) Payments received under programs funded in whole or in part under the Job Training Partnership Act (29 U.S.C. 1552(b));
  - (g) Income derived from the disposition of funds of the Grand River Band of Ottawa Indians (Public Law 94-540, 90 Statute 2503-2504);
  - (h) The first \$2,000 of per capita shares received from judgment funds awarded by the Indian Claims Commission or the Court of Claims (25 U.S.C. 1407-1408) or from funds held in trust for an Indian tribe by the Secretary of Interior (25 U.S.C. 117);
  - (i) Scholarships funded under Title IV of the Higher Education Act of 1965 including awards under the Federal work-study program or under the Bureau of Indian Affairs student assistance programs that are made available to cover the costs of tuition, fees, books, equipment, materials, supplies, transportation, and miscellaneous personal expenses of a student at an educational institution (20 U.S.C. 1087uu);
  - (j) Payments received from programs funded under Title V of the Older Americans Act of 1965 (U.S.C. 3056(f));
  - (k) Payments received after January 1, 1989, from the Agent Orange Settlement Fund or any other fund established pursuant to the settlement in the In Re Agent Orange product liability litigation, M.D.L. No. 381 (E.D.N.Y.); and
  - (l) Payments received under Maine Indian Claims Settlement Act of 1980 (Pub.L. 96-420, 94 Statute 1785);
  - (m) Earned income tax credit refund payments received from the Internal Revenue Service on or after January 1, 1991. Payments may be received in a resident's regular pay or as a single sum payment;
  - (n) Payments received as AmeriCorps Living Allowances (29 U.S.C. Sec.1552);
  - (o) Payments received under WIC-Supplemental Food Program for Women, Infants and Children;
  - (p) Payments received under the National School Lunch Program (42 U.S.C. 175-176);
  - (q) Payments received under the Child Nutrition Act (42 U.S.C. 1771-1778);
  - (r) Payments received under the Child Care Block Grant Act of 1990.