

**HUD 811 PROGRAM**  
**INCOME AND RENT CALCULATION WORKSHEET**

<b>Property:</b>			
<b>Property Manager:</b>			
<b>HUD 811 Participant:</b>			
<b>Lease Date:</b>		<b>Unit #:</b>	
<b>Date Prepared:</b>		<b>Prepared by:</b>	
<b>Type of Change:</b>		<b>Effective Date:</b>	

**ASSETS:** (examples: land (real property), annuity, savings, average checking account balance for six months, insurance policies, burial plot)

FAMILY MEMBER	DESCRIPTION OF ASSET	CURRENT FACE VALUE OF ASSETS	ACTUAL INCOME FROM ASSETS
HOH:			
<b>1. TOTAL NET FACE VALUE OF ASSETS (Item 1):</b>		(1)	
<b>2. TOTAL ACTUAL INCOME FROM ASSETS (Item 2)*:</b>			(2)
<b>3. IMPUTED INCOME FROM ASSETS (Item 3)*:</b>		(3)**	

\*Complete only if Item 1 is greater than \$5000

\*\*Item 1 x .02

**ANTICIPATED ANNUAL INCOME:**

FAMILY MEMBER	WAGES/SALARIES	SOCIAL SECURITY	OTHER PUBLIC ASSISTANCE	OTHER
HOH:				
<b>4. TOTALS:</b>				(4)
<b>5. ASSET INCOME TO BE CONSIDERED (ENTER THE GREATER OF ITEM 2 OR 3):</b>				(5)
<b>6. TOTAL ANNUAL INCOME:</b>				(6)

**EXPENSES AND ALLOWANCE INFORMATION:**

Number of dependents under 18 (include full-time students and disabled family members) DO NOT include head of household, spouse or foster children.	(7)
Is the head of household or spouse at least 62 years of age or disabled?	(8) <input type="checkbox"/> Yes <input type="checkbox"/> No
Total Child Care Expenses: a. Expenses that enable a family member to work: Name of Household Member enabled to work:	(9a)
b. Expenses that enable a family member to further education: Name of Household Member enabled to further education:	(9b)
Total Disability Expense:	(10)
Names of Household Members enabled to work: _____ _____	
Total Medical Expenses Not Reimbursed by Others:	(11)
12. Total Annual Income (enter amount from item 6)	(12)
13. 3% of Annual Income (Item 12 x .03)	(13)
14. Dependent Deduction (enter \$480 x Item 7)	(14)
15. Allowable Child Care Expenses (Item 9a + Item 9b <b>BUT</b> expenses allowed for 9a must not exceed employment income of household member(s) enabled to work.)	(15)
16. Total Disability Assistance Expense (enter amount from item 10)	(16)
17. Allowable Disability Assistance Expenses (Item 16 minus Item 13 <b>BUT</b> never more than employment income of household member(s) enabled to work.)	(17)
18. Total Medical Expenses (Enter amount from Item 11 <b>ONLY</b> if head of household or spouse is at least 62 or disabled.)	(18)
19. Allowable Medical Expenses (Complete <b>ONLY</b> if head of household or spouse is at least 62 or disabled.) a. If Item 16 is greater than Item 13, allow all medical shown in Item 18. b. Otherwise, enter Item 16 + Item 18 minus Item 13 (if result is negative, enter zero)	(19)
20. Elderly/Disabled Household Deduction (Enter \$400 <b>ONLY</b> if head of household or spouse is at least 62 or disabled.)	(20)

**CALCULATIONS:**

21. Total Allowances	(add Items 14, 15, 17, 19 & 20)	(21)
22. Annual Adjusted Income	(Item 12 minus 21)	(22)
23. Monthly Income	(Item 12 divided by 12 months)	(23)
24. Monthly Adjusted Income	(Item 22 divided by 12 months)	(24)
25. 30% of monthly adjusted income	(Item 24 x .30)	(25)
26. 10% of monthly income	(Item 23 x .10)	(26)
27. Total Tenant Payment	(enter larger of Item 25 or 26)	(27)
28. Contract Rent		(28)
29. Applicable Utility Allowance	(enter amount from PHA schedule)	(29)
30. Gross Rent	(Item 28 + Item 29)	(30)
31. Total Tenant Payment	(same as Item 27)	(31)
32. Tenant Rent	(Item 31 minus Item 29. If result is negative, enter zero)	(32)
33. Utility Reimbursement	(If Item 32 is zero, enter Item 29 minus Item 31)	(33)
34. Housing Assistance Payment/DCA Subsidy	(Item 28 minus Item 32)	(34)