CPD Income Eligibility Calculator Demo Screenshots, November 13, 2012

The purpose of this document is to demonstrate the individual pages of the CPD Income Eligibility Calculator based upon a series of sample households and by type of income definition (e.g., Part 5, American Community Survey (ACS) and IRS 1040 Adjusted Income). These calculations demonstrate the input fields as well as the screens those who will use the calculator will see and may be handy for users of the calculator to review prior to initial input into the calculator, or as a follow-along document when being trained on the Income Calculator. The following calculations are provided as samples:

- HOME Annual Income Calculation, Part 5
- HOME Adjusted Income Calculation
- HOME Rental Assistance Income Calculation
- CDBG Annual Income Calculation, ACS
- NSP Annual Income Calculation, IRS 1040

Registration/Log-In	1
Income Calculator Dashboard	2
HOME Income Calculation – Annual Income	3
Beneficiary ID – Screen 1: Beneficiary ID and Number of HH Members	3
Beneficiary ID –Screen 2: HH Member Info	4
Beneficiary Location	5
Income Determination Method – Screen 1: Previously Determined Eligible	5
Income Determination Method – Screen 2: Type of Assistance	6
Income Determination Method – Screen 3: LIHTC	6
Beneficiary Income – Screen 1: Income Definition	7
Beneficiary Income – Screen 2: Calculation Method	7
Beneficiary Income – Screen 3: Select HH Member	8
Beneficiary Income – Screen 4: Add/View Assets	8
Beneficiary Income – Screen 5: Job and Wages	9
Beneficiary Income – Screen 6: Benefits and Pensions	10
Beneficiary Income – Screen 7: Public Assistance	
Beneficiary Income – Screen 8: Other Income	10
Beneficiary Income – Screen 9: HH Member Summaries	11
Beneficiary Income – Screen 10: Add Info for Other HH Members	11
Summary: Option to Download PDF	12
Sample PDF Summary Form for Records	13
HOME Income Calculation – Adjusted Income	16
Dependents	16
Childcare Expenses	16
Disability Expenses	16
Medical Expenses	17
Summary: Option to Download PDF	
Sample PDF Summary Form for Records	19
HOME Income Calculation – Rental Assistance	21
Approved Rent/Utility	21
Rent Model	21
Rent Standard	22
CPD Income Eligibility Calculator Demo Screenshots – Version 1, October 11, 2012	Page 2 of 49

Sample PDF Summary Form for Records	24
CDBG Income Calculation – Annual Income	26
Type of Assistance	26
Beneficiary ID – Screen 1: Beneficiary ID and Number of HH Members	26
Beneficiary ID – Screen 2: HH Member Info	27
Beneficiary Location	28
Income Determination Method	28
Beneficiary Income – Screen 1: Income Definition	29
Beneficiary Income – Screen 2: Calculation Method (HH1 and HH2)	
Summary: Option to Download PDF	
Sample PDF Summary Form for Records	
NSP Income Calculation – Annual Income	35
Beneficiary ID – Screen 1: Beneficiary ID and Number of HH Members	35
Beneficiary ID – Screen 2: HH Member Info	
Beneficiary Location	
Income Determination Method	
Beneficiary Income – Screen 1: Income Definition	
Beneficiary Income – Screen 2: Calculation Method (HH1 and HH2)	
Summary: Option to Download PDF	43
Sample PDF Summary Form for Records	45

Registration/Log-In



Income Calculator Dashboard

🚥 Dashboard		Change Password
Select a program and start a new calculation	Select One	Start
CDBG Calculations Show 10 • entries	Search:	New Calculation
Beneficiary <u>▲</u> No. of ID Members ↓ Location	Calculation A Calculation A Calculation A Purge Date A Status Type Date A Date Date A Date Date	♦ Eligibility Status
100312 2 Fort Wayne, IN MSA	Annual 10/05/2012 11/05/2013 Complete	Eligible
Showing 1 to 1 of 1 entries 🧹 🕨		Clear All Delete

HOME Calculations

Show 10 💌 entries Search:									
Beneficiary 🔺 ID	No. of Members	Location	\$	Calculation Type	Calculation 🖨	Purge Date 🜲	Status	♦ Eligibility Status	Delete
<u>92812</u>	4	Columbus, OH HUD Metro FMR Area		Annual	10/05/2012	11/05/2013	Complete	Eligible	
<u>92812</u>	4	Columbus, OH HUD Metro FMR Area		Adjusted	10/05/2012	11/05/2013	Complete		
<u>92812</u>	4	Columbus, OH HUD Metro FMR Area		TBRA	10/05/2012	11/05/2013	Complete		
Showing 1 to 3 of 3 entries Clear All						Delete			

New Calculation

NSP Calcul	ations									New Ca	alculation
Show 10 💌	entries						ę	Search:			
Beneficiary 🛓 ID	No. of Members	ŧ	Location	¢	Calculation Type	Calculation Date	Purge Date 🌲	Status	¢	Eligibility Status	Delete
<u>1003122</u>	4		Chicago-Joliet-Naperville, IL HUD Metro FMR Area		Annual	10/05/2012	11/05/2013	Complete		Eligible	
Showing 1 to 1	of 1 entries	5 1	F						(<u>Clear All</u>	Delete

HOME Income Calculation – Annual Income

Beneficiary ID - Screen 1: Beneficiary ID and Number of HH Members



Beneficiary ID - Screen 2: HH Member Info

HOME Annual Income Calculation

Beneficiary ID: 92812

DASHBOARD ANNUAL INCOME Beneficiary ID Beneficiary Location Income Determination Method Beneficiary Income Summary ADJUSTED INCOME Dependents Childcare Expenses Disability Expenses Medical Expenses Summary - TBRA < Previous Approved Rent/ Utility

The CPD Income Eligibility Calculator asks for "Member IDs" instead of "First Names" to help protect the privacy of applicants to CPD programs. Each Member ID you enter should be unique to an individual within the family or household associated with this Beneficiary ID. Printouts from the Calculator for all programs except HOPWA will include the Member IDs entered here along with a blank space in which the First Name of the associated individual can be written or otherwise inserted. **DO NOT use any personal information to create Member ID(s), including but not limited to names, social security numbers, or addresses.**

Each user is responsible for designing their own method for creating Member IDs, as well maintaining and adequately protecting their own auditable records which connect Member IDs to the associated individuals within the family or household whose income was determined (as appropriate and/or required under the rules of each CPD program.)

Income determinations are based on the gross income anticipated by all adults in the household in the next 12 months.

Please enter a Member ID for each member of the **92812** household and check **ALL** of the boxes that apply for each member. Please note, you will not be able to continue until all Beneficiary Member IDs are populated.

	#1	#2	#3	#4
Beneficiary Member ID	HH1	HH2	HH3	HH4
This member is a child age 18 or UNDER				
This member is a fulltime student OVER the age of 18 years				
This member is 62 years of age or older				
This member is a person (of any age) with disabilities				
This member is the head of household				
This member is the co-head of household				



Beneficiary Location

HOME Annual Income Calculation		Beneficiary ID: 92812	🚔 Print
IIII DASHBOARD	Please select the location and income limit informat State	ion applicable to this household:	
ANNUAL INCOME	Ohio 👻		
Beneficiary ID	Area Columbus, OH HUD Metro FMR Area		
► Beneficiary Location	Applicable 2012 Income Limit for household size in a	area	
Income Determination Method	50% -		
Beneficiary Income	The 2012 50% Income Limit for a 4-member house METRO18140M18140) is \$33,750. (Completed on O	ahold in Columbus, OH HUD Metro FMR Area (CBS) ictober 5, 2012.)	A.:
Summary			
	Please print this page for your files.		
Dependents	< Previous		Continue

Income Determination Method – Screen 1: Previously Determined Eligible

HOME Annual Income C	alculation	Beneficiary ID: 92812
m DASHBOARD	Has this household previously been determined income eligible?	
ANNUAL INCOME		
Beneficiary ID		
Beneficiary Location	< Dentions	Castings
Income Determination Method	C revious	Continue

Income Determination Method - Screen 2: Type of Assistance

HOME Annual Income Ca	Beneficiary ID: 92812						
ashboard	What type of HOME assistance is being provided to this household?	2					
ANNUAL INCOME	Homeowner Kenabilitation Homebuyer Rental*						
Beneficiary ID	 Tenant-based Rental Assistance* 						
Beneficiary Location	* IMPORTANT REMINDER: During an annual income RECERTIFICATION of a family residing in HOME-assisted rental housing, or receiving HOME tenant-based rental assistance, it is necessary to manually exclude from annual income certain increases in the income of a disabled family member. These evolutions apply to apply to apply						
Method	income increases resulting from the following:						
Beneficiary Income	 Employment of a family member who is a person with disabilities and who was previously unemployed for one or more years prior to employment; 						
Summary	 Increased earnings by a family member who is a person with economic self-sufficiency or other job training program; or 	disabilities during participation in any					
ADJUSTED INCOME	New employment or increased earnings of a family member who is a person with disabilities, during or						
Dependents	within six months after receiving assistance, benefits or services under any state program for families funded under Part A of Title IV of the Social Security Act, as determined by the responsible entity in consultation with the local agencies administering temporary assistance for needy families (TANF) and						
Childcare Expenses	Welfare-to-Work (WTW) programs. The TANF program is not limited to monthly income maintenance, but also includes such benefits and services as one-time payments, wage subsidies and transportation provided that the total program care a size month pacied is at least 500.						
Disability Expenses	These evolusions from annual income are of limited duration. The ful	l amount of increase to a qualified familu's appual					
Medical Expenses	These exclusions from annual income are of limited duration. The full amount of increase to a qualified family's annual income is excluded for the cumulative 12-month period beginning on the date the disabled family member is first employed or the family first experiences an increase in annual income attributable to the employment. During the second cumulative 12-month period, the PJ is required to exclude from annual income 50 percent of any increase in income. The disallowance of increased income of an individual family member who is a person with disabilities is limited to a lifetime 48-month period.						
Summary							
TBRA							
Approved Rent/ Utility	< Previous	Continue					

Income Determination Method – Screen 3: LIHTC

HOME Annual Income Ca	alculation	Beneficiary ID: 92812
III DASHBOARD	Examine source documentation of income for all members of this ho Is this income determination being conducted for housing in which L	usehold. ow Income Housing Tax Credits are involved?
ANNUAL INCOME	© Yes ◉ No	
Beneficiary ID		
Beneficiary Location		Orthouse
Income Determination Method	C Previous	Continue

Beneficiary Income – Screen 1: Income Definition

CPD Income Eligi	Change Password	
HOME Annual Income C	alculation	• Beneficiary ID: 92812
I DASHBOARD	You may choose one of the following definitions of income to use when household:	en calculating "annual income" for the 92812
	 Ø 24 CFR Part 5 Annual Income ⑦ IRS Form 1040 Adjusted Gross Income 	
Beneficiary ID		
Beneficiary Location	< Previous	Continue
Income Determination Method		U.
► Beneficiary Income		

Beneficiary Income – Screen 2: Calculation Method

CPD Income Eligib	ility Calculator	Change Password
HOME Annual Income Ca	iculation	Beneficiary ID: 92812
IIII DASHBOARD	24 CFR Part 5 Annual Income	
ANNUAL INCOME	0.0060 %	
Beneficiary ID	Choose one of the following methods to calculate "and definition of income:	nual income" for the 92812 household using the 24 CFR Part 5
Beneficiary Location	Short Form Method Guided (Step-by-Step) Method
Income Determination Method	< Previous	Continue
 Beneficiary Income 		

Beneficiary Income – Screen 3: Select HH Member

HOME Annual Income C	alculation	Beneficiary ID: 92812
I DASHBOARD	24 CFR Part 5 Annual Income Select a Beneficiary Member ID to begin calculating assets and anti	cipated annual income.
	HH1 -	
Beneficiary ID		
Beneficiary Location		
Income Determination Method	< Previous	Continue >
Beneficiary Income		<u> </u>

Beneficiary Income – Screen 4: Add/View Assets

HOME Annual Income Calo	ulation				i Benef	iciary ID: 92812		
IIII DASHBOARD	24 CFR Part 5	Annual Inco	ome					
	Asset for Bene Asset Type	ficiary Men	nber HH1. Asset Descriptio	on	Current Cash V	alue Actual I	ncome fro	m Assets
Beneficiary ID		•			\$	\$		
Beneficiary Location	_							_
Income Determination Method	Cancel							Save
Beneficiary Income								0
HOME Annual Income Calc	ulation				¥ Benef	iciary ID: 92812		
🗰 DASHBOARD	24 CFR Part 5	Annual Inco	ome			24 CFF	<u>R Part 5 Inclu Exclusions</u>	<u>isions &</u>
ANNUAL INCOME	Calculate asse	ts for Bene	ficiary Member H	IH1.				
Beneficiary ID	Asset Type	Asset De	scription	Current Cas	h Value A	ctual Income from Assets		
Beneficiary Location	Cash	Savings		\$2	2,000.00	\$10.00	Edit	Delete
Income Determination Method	+ Add Anothe	r -						
Beneficiary Income	< Previous							continue
Summary								<u>.</u>

Beneficiary Income – Screen 5: Job and Wages

HOME Annual Income Ca	alculation	i Beneficiary 92812 ID:
	24 CFR Part 5 Annual Income	
DASHBOARD	Calculate wages, overtime, bonuses, and b	enefits for Beneficiary Member ID: HH1
ANNUAL INCOME	Add a job for this member?	······································
Beneficiary ID		
Beneficiary Location	Description	
Income Determination Method	Wages/Salaries ⊚ Hourly ⊚ Annual	
Beneficiary Income		
Summary	Overtime/Bonuses	
ADJUSTED INCOME	Total Overtime/Bonus Pay, Month 1	Total Overtime/Bonus Pay, Month 7
Dependents	Total Overtime/Bonus Pay, Month 2	Total Overtime/Bonus Pay, Month 8
Childcare Expenses	\$	\$
Disability Expenses	Total Overtime/Bonus Pay, Month 3	Total Overtime/Bonus Pay, Month 9
Medical Expenses	Total Overtime/Bonus Pay, Month 4	Total Overtime/Bonus Pay, Month 10
Summary	\$	\$
TBRA	Total Overtime/Bonus Pay, Month 5	Total Overtime/Bonus Pay, Month 11
Approved Rent/ Utility	\$	S
Rental Model	\$	\$
Rent Standard	Raises	
Welfare Rent	All forms of income earned by program applica raises and annual cost of living adjustments (C	nts must be accounted for. In addition to base salary, this will include OLAs). Use the data entry fields below to enter information about any
Summary	anticipated increase in annual income the appli hourly wage or annual salary and/or an annual	cant will experience over the next 12 months due to a raise in his or her COLA.

 $\hfill\square$ Check if member anticipates a raise or COLA increase.



Beneficiary Income – Screen 6: Benefits and Pensions

HOME Annual Income Ca	Iculation	• Beneficiary ID:	92812
🛅 DASHBOARD	24 CFR Part 5 Annual Income		
	Does Beneficiary Member HH1 receive Benefits and/or Pensions	?	
Beneficiary ID			
Beneficiary Location			
Method Beneficiary Income	< Previous		Continue >

Beneficiary Income – Screen 7: Public Assistance

HOME Annual Income Ca	lculation	Beneficiary ID:	92812
🔠 DASHBOARD	24 CFR Part 5 Annual Income		
ANNUAL INCOME			
Beneficiary ID			
Beneficiary Location			
Income Determination Method	< Previous		Continue >
Beneficiary Income			

Beneficiary Income – Screen 8: Other Income

HOME Annual Income Ca	Iculation	• Beneficiary ID:	92812
T DASHBOARD	24 CFR Part 5 Annual Income		
ANNUAL INCOME	Yes No		
Beneficiary ID			
Beneficiary Location			
Income Determination Method	< Previous		Continue >
Beneficiary Income			

Beneficiary Income – Screen 9: HH Member Summaries

HOME Annual Income Calcu	ulation			• Beneficiary ID:	92812	
IIII DASHBOARD	24 CFR Part 5 Assets and Anticipa	ated Income Su	immary			
ANNUAL INCOME	HH1 HH2	HH3	HH4			
Beneficiary ID	Summary for Beneficiary Membe	er HH1				
Beneficiary Location	Assets					EDIT
Income Determination	Asset Description		Asset Type	Current Cash Value	Actual In Assets	come from
Method Beneficiary Income	Savings		Cash	\$2,000.00	\$10.00	
Summary	Jobs					ADD JOB
	Sanitation			VI	EW/EDIT	DELETE
Dependents	Benefits and/or Pensions					
Childcare Expenses	No Benefits and/or Pensions ent	tered				
Disability Expenses	No Public Assistance entered					
Medical Expenses	Other Income					
Summary	No other income entered					
TBRA	Select continue to add assets and an	ticipated annual	income data for	another beneficiar	y member	
Approved Rent/ Utility						
Rental Model						Continue >

Beneficiary Income – Screen 10: Add Info for Other HH Members

HOME Annual Income Cal	lculation	Beneficiary ID:	92812
a Dashboard	24 CFR Part 5 Annual Income		
	Calculate assets and anticipated annual income for another beneficiar	y member?	
Beneficiary ID			
Beneficiary Location	< Previous		Configue >
Method Beneficiary Income			<u> </u>

Summary: Option to Download PDF

HOME Annual Income Calo	culation			• Beneficiary 9 ID:	02812
III DASHBOARD	24 CFR Part 5 Annual Incom	e Summary			
ANNUAL INCOME					Download PDF file
Beneficiary ID	Beneficiary ID: 92812		Area, St	ate: Columbus, OH HUD	Metro FMR Area, Ohio
Beneficiary Location	Number of Members: 4		Income		
	> Assets				
Method					
Beneficiary Income	Member ID	Asset Type(s)		Current Cash Value	Actual Income from Assets
► Summary					
	HH1	Cash		\$2,000.00	\$10.00
Dependents	HH2			\$0.00	\$0.00
Childcare Expenses	HH3			\$0.00	\$0.00
Disability Expenses	HH4			\$0.00	\$0.00
Medical Expenses	NET CASH VALUE OF ASS	ETS		\$2,000.00	
Summary	TOTAL ACTUAL INCOME F	ROM ASSETS			\$10.00
TBRA		CETC			
Approved Rent/ Utility	(only if the Net Cash Value	of Assets is greater tha	n \$5,000):		\$0.00
Rental Model	> Anticipated Annual Incom	e			

Rent Standard

Welfare Rent

Summary

Member ID	Wages/Salaries	Benefits/Pensions	Public Assistance	Other Income	Asset Income
HH1	\$20,000.00	\$0.00	\$0.00	\$0.00	
HH2	\$10,000.00	\$0.00	\$0.00	\$0.00	
HH3	\$0.00	\$0.00	\$0.00	\$0.00	
HH4	\$0.00	\$0.00	\$0.00	\$0.00	
TOTALS	\$30,000.00	\$0.00	\$0.00	\$0.00	\$10.00
TOTAL ANN	JAL INCOME				\$30,010.00

Based upon the information submitted, the Annual Income of 92812 has been determined to be below the income limit for the area.



Save & Return to Dashboard

Sample PDF Summary Form for Records

U.S. Department of Housing and Urban Development Office of Community Planning and Development Income Eligibility Calculator

24 CFR PART 5 ANNUAL INCOME CALCULATION Completed on 10/05/2012

1. Last Name:			2. Beneficiary ID:		92812	
3. Number of Men	nbers: 4	4. Area/State: Columbus, OH H Ohio	UD Metro FMR Area,	5. 201	2_Income Limit	\$33,750.00
			ASSETS			
First Names	Member IDs	Asset Descript	tion		Current Cash Value of Assets	Actual Income from Assets
	HH1	Cash			\$2,000.00	\$10.00
	HH2				\$0.00	\$0.00
	ннз				\$0.00	\$0.00
	ння				\$0.00	\$0.00
6. Net Cash Value	of Assets				6. \$2,000.00	
7. Total Actual Inco	ome from Asset	5				7. \$10.00
8. Imputed Income	e from Assets (o	only if the Net Ca	ash Value of Assets is	greater t	han \$5,000):	8. \$0.00

Page 1 of 3

U.S. Department of Housing and Urban Development Office of Community Planning and Development Income Eligibility Calculator

> 24 CFR PART 5 ANNUAL INCOME CALCULATION Completed on 10/05/2012

		ANTICIPATED	ANNUAL INCO	ME			
First Names	Member IDs	a. Wages/ Salaries	b. Benefits/ Pensions	c. Public Assistance	d. Other Income	e. As Inco	set ne
	HH1	\$20,000.00	\$0.00	\$0.00	\$0.00		
	HH2	\$10,000.00	\$0.00	\$0.00	\$0.00		
	ннз	\$0.00	\$0.00	\$0.00	\$0.00		
	HH4	\$0.00	\$0.00	\$0.00	\$0.00		
9. Totals		a. \$30,000.00	b. \$0.00	c. \$0.00	d. \$0.00	e.	\$10.0
10. Enter total of ite	ems from 9a through	9e. This is Ann	ual Income.			10.	\$30,010.0

Based upon the information submitted, the Annual Income of <u>92812</u> has been determined to be <u>below</u> the income limit for this area.

COMPLETE SIGNATURES ON NEXT PAGE

Page 2 of 3

U.S. Department of Housing and Urban Development Office of Community Planning and Development Income Eligibility Calculator

24 CFR PART 5 ANNUAL INCOME CALCULATION Completed on 10/05/2012

Beneficiary ID: 92812

HEAD OF HOUSEHOLD				
Signature Printed Name Date				

	OTHER BENEFICIARY AD	OULTS*
Signature	Printed Name	Date

* Attach another copy of this page if additional signature lines are required.

PREPARER			
Signature	Printed Name	Date	
-			

Page 3 of 3

HOME Income Calculation – Adjusted Income

Dependents

HOME Adjusted Income C	alculation	Beneficiary ID:	92812
T DASHBOARD	Number of Dependents How many dependents are in this household?		
	2		
ADJUSTED INCOME	Note: \$480 is subtracted from Annual Gross Income for each depende	ent.	
 Dependents 	•		
Childcare Expenses			Corrying >

Childcare Expenses

HOME Adjusted Income C	alculation	Beneficiary ID:	92812	
T DASHBOARD	Childcare Expenses			
ANNUAL INCOME	Enter the amount of unreimbursed childcare expenses anticipated for \$ 0.00	this household in t	he coming year.	
Childcare Expenses				
Disability Expanses	< previous			Ce hinde >

Disability Expenses

HOME Adjusted Income C	alculation	• Beneficiary ID:	92812	
m DASHBOARD	Disability Expenses	this have a hald in th		
ANNUAL INCOME	S O.00	unis nousenoid in u	ie coming year.	
Dependents				
Childcare Expenses	< Previous			Continue >
► Disability Expenses				- <u>U</u> -

Medical Expenses

HOME Adjusted Income C	alculation	• Beneficiary ID:	92812	
ashboard	Medical Expenses			
ANNUAL INCOME	Enter the amount of unreimbursed medical expenses anticipated for t	his household for t	he coming year.	
	0.00			
Dependents				
Childcare Expenses	< Previous			Continue >
Disability Expenses				5
► Medical Expenses				

Summary: Option to Download PDF

HOME Adjusted Income C	alculation Summary	neficiary	92812
	Adjusted Income Calculation Summary		Downle
ANNUAL INCOME	1. Annual Income (based on the Part 5 Annual Income definition):	1.	\$30,010.00
ADJUSTED INCOME	2. Number of household members (excluding head or spouse) under 18,		
	disabled, or full-time student:	2.	2
Dependents	3. Dependent deduction (line 2 multiplied by \$480)	3.	\$960.00
Childcare Expenses	4. Child care expenses deduction (reasonable child care expenses for		
Disability Expenses	children age 12 and under):	4.	\$0.00
Medical Expenses	5. Disability assistance expenses:	5.	\$0.00
Summary	6. Three percent of Annual Income:	6.	\$900.30
TBRA	7. Line 5 minus line 6 (if negative, \$0):	7.	\$0.00
	8 Amount earned by household member enabled to work as a result of		
Approved Rent/ Utility	disability assistance expenses (No member is selected):	8.	\$0.00
Rental Model	9. Disability assistance allowance (lesser of lines 7 or 8):	9.	\$0.00
Rent Standard	10. Total medical expenses (elderly households only):	10.	\$0.00
Welfare Rent	11. Allowable medical expenses (elderly households only):		
Summary	 If no disability assistance expenses reported, equal to total medical expenses minus 3% of Annual Income. 		
	 If disability assistance expenses reported and line 7 is greater than zero, equal to total medical expenses. 		
	 If disability assistance expenses reported but line 7 is zero, equal to)	
	total medical expenses minus 3% of Annual Income minus disability	(
	assistance expenses.	11.	\$0.00
	12. Elderly/Disabled household deduction (\$400 per household):	12.	\$0.00
	13. Sum of deductions (lines 3, 4, 9, 11, and 12):	13.	\$960.00
	14. ADJUSTED INCOME (Annual Income minus sum of deductions):	14.	\$29,050.00

Sample PDF Summary Form for Records

Income Eligibility Calculator	:	
ADJUSTED INCOME CALCULATION Completed on 10/05/2012		
1. Annual Income (based on the {24 CFR Part 5/IRS 1040/ACS} definition):	1.	\$30,010.00
Number of household members (excluding head or spouse) under 18, disabled, or full-time student:	2.	:
3. Dependent deduction (line 2 multiplied by \$480):	3.	\$960.00
4. Child care expenses deduction (reasonable child care expenses for childre age 12 and under):	n 4.	\$ 0.00
5. Disability assistance expenses:	5.	\$0.00
6. Three percent of Annual Income:	6.	\$900.30
7. Line 5 minus line 6 (if negative, \$0):	7.	\$0.00
 Amount earned by household member enabled to work as a result of disability assistance expenses (<u>No member is selected</u>): 	8.	\$0.00
9. Disability assistance allowance (lesser of lines 7 or 8):	9.	\$0.0
10. Total medical expenses (elderly households only):	10.	\$0.00
 Allowable medical expenses (elderly households only): If no disability assistance expenses reported, equal to total medical expenses minus 3% of Annual Income. If disability assistance expenses reported and line 7 is greater than zero, equal to total medical expenses. If disability assistance expenses reported but line 7 is zero, equal to total medical expenses reported but line 7 is zero, equal to total medical expenses reported but line 7 is zero, equal to total medical expenses minus 3% of Annual Income minus disability assistance expenses. 	11.	\$0.00
12. Elderly/Disabled household deduction (\$400 per household):	12.	\$0.0
13. Sum of deductions (lines 3, 4, 9, 11, and 12):	13.	\$960.00
14. ADJUSTED INCOME (Annual Income minus sum of deductions):	14.	\$29,050.00
COMPLETE SIGNATURES ON SECOND PAGE		

U.S. Department of Housing and Urban Development Office of Community Planning and Development Income Eligibility Calculator

ADJUSTED INCOME CALCULATION Completed on 10/05/2012

Beneficiary ID: 92812

HEAD OF HOUSEHOLD				
Signature Printed Name Date				

OTHER BENEFICIARY ADULTS*				
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		

* Attach another copy of this page if additional signature lines are required.

PREPARER			
Signature	Printed Name	Date	

Page 2 of 2

HOME Income Calculation – Rental Assistance

Approved Rent/Utility

HOME Rental Assistance (Calculation	• Beneficiary ID:	92812	
 DASHBOARD ANNUAL INCOME ADJUSTED INCOME TBRA Approved Rent/ Utility 	Approved Rent/Utility Enter the approved monthly rent charged by the owner for this unit. \$ 800.00 Enter the monthly Utility allowance for this unit. \$ 100.00			
Rental Model Rent Model				Conti <mark>r Im</mark> >
HOME Rental Assistance	Calculation	• Beneficiary ID:	92812	
DASHBOARD ANNUAL INCOME	Rental Model Select the method the PJ uses to determine the TBRA subsidy. © Section 8 Rental Certificate model (fixed tenant payment)			
	 Section 8 Rental Voucher model (fixed PJ payment) Another model 			
Approved Rent/ Utility				
► Rental Model	< Previous			Coping >

Rent Standard

HOME Rental Assistance	Calculation	• Beneficiary ID:	92812
	Rent Standard Enter the PJ's rent standard for the unit size applicable to this househousehousehousehousehousehousehouse	old.	
Approved Rent/ Utility Rental Model Rent Standard	< Previous		Continue

Summary: Option to Download PDF

HOME Rental Assistance Calculation Summary		• Beneficiary ID:	92812
ashboard	Rental Assistance Calculation Summary - Rental Voucher Mode	I	Download PDF file
+ ANNUAL INCOME	(This form is a continuation of the CPD Income Eligibility Calculator's	Adjusted Income (Calculation form.)
	15. Rent Standard:	15.	\$900.00
TBRA	16. 30% of Monthly Adjusted Income:	16.	\$726.25
Approved Rent/ Utility	17. Maximum Subsidy (line 15 minus line 16):	17.	\$173.75
Rental Model	18. Rent Charged by Owner:	18.	\$800.00
Rent Standard	19. Utility Allowance (if any):	19.	\$100.00
Welfare Rent	20. Gross Rent for the Unit (line 18 plus line 19):	20.	\$900.00
► Summary	21. Gross Rent minus Maximum Subsidy (line 20 minus line 17):	21.	\$726.25
	22. 10% of Monthly Annual Income:	22.	\$250.08
	23. Total Household Contribution (higher of line 21 or line 22):	23.	\$726.25
	24. Gross Rent minus Household Contribution (line 20 minus line 23): 24.	\$173.75
	25. Total Voucher Subsidy (lower of line 17 or line 24):	25.	\$173.75
	26. PJ Payment to Owner (lower of line 18 or line 25):	26.	\$173.75
	27. Household Rent to Owner (line 18 minus line 26):	27.	\$626.25
	28. Utility Reimbursement to Household (line 25 minus line 26):	28.	\$0.00

< Previous

Save & Return to Dashboard

Sample PDF Summary Form for Records

U.S. Department of Housing and Urban Development Office of Community Planning and Development Income Eligibility Calculator

RENTAL ASSISTANCE CALCULATION – RENTAL VOUCHER MODEL Completed on 10/08/2012

(This form is a continuation of the CPD Income Eligibility Calculator's Adjusted Income Calculation form.)

15. Rent Standard:	15.	\$900.00
16. 30% of Monthly Adjusted Income:	16.	\$726.25
17. Maximum Subsidy (line 15 minus line 16):	17.	\$173.75
18. Rent Charged by Owner:	18.	\$800.00
19. Utility Allowance (if any):	19.	\$100.00
20. Gross Rent for the Unit (line 18 plus line 19):	20.	\$900.00
21. Gross Rent minus Maximum Subsidy (line 20 minus line 17):	21.	\$726.25
22. 10% of Monthly Annual Income:	22.	\$250.08
23. Total Household Contribution (higher of line 21 or line 22):	23.	\$726.25
24. Gross Rent minus Household Contribution (line 20 minus line 23):	24.	\$173.75
25. Total Voucher Subsidy (lower of line 17 or line 24):	25.	\$173.75
26. PJ Payment to Owner (lower of line 18 or line 25):	26.	\$173.75
27. Household Rent to Owner (line 18 minus line 26):	27.	\$626.25
28. Utility Reimbursement to Household (line 25 minus line 26):	28.	\$0.00

COMPLETE SIGNATURES ON SECOND PAGE

Page 1 of 2

U.S. Department of Housing and Urban Development Office of Community Planning and Development Income Eligibility Calculator

RENTAL ASSISTANCE CALCULATION – RENTAL VOUCHER MODEL Completed on 10/08/2012

Beneficiary ID: 92812

HEAD OF HOUSEHOLD			
Signature	Printed Name	Date	

OTHER BENEFICIARY ADULTS*			
Signature	Printed Name	Date	
Signature	Printed Name	Date	
Signature	Printed Name	Date	
Signature	Printed Name	Date	
Signature	Printed Name	Date	
Signature	Printed Name	Date	
Signature	Printed Name	Date	
Signature	Printed Name	Date	
Signature	Printed Name	Date	
Signature	Printed Name	Date	
Signature	Printed Name	Date	

 PREPARER

 Signature
 Printed Name
 Date

Page 2 of 2

CDBG Income Calculation – Annual Income

Type of Assistance

CDBG Annual Income Cal	culation	• Beneficiary ID:	100312
m DASHBOARD	What type of CDBG national objective is being met?		
	 Low/Mod - Jobs Low/Mod - Limited Clientele 		
► Type of Assistance	 Low/Mod - Limited Clientele - Presumed Benefit Low/Mod - Area Basis 		
Beneficiary ID	 Slum/Blight - Area Basis Slum/Blight - Spot Basis 		
Beneficiary Location	 Slum/Blight - Urban Renewal Urgent Need 		
Income Determination Method			
Beneficiary Income	< Previous		Cortinge >

Beneficiary ID – Screen 1: Beneficiary ID and Number of HH Members

CDBG Annual Income Ca	lculation	Beneficiary ID:	100312	
I DASHBOARD	The CPD Income Eligibility Calculator asks for a "Beneficiary ID" inste applicants to CPD programs. The Beneficiary ID you enter should be and printouts, and will be the key data element percessary to later find	ad of a "Last Nam unique, will be inclu	e" to help protect the privacy of uded on the Calculator screens	
ANNUAL INCOME	performed for that beneficiary within the Calculator. DO NOT use any personal information to create a Beneficiary ID, including but not limited to names, social security numbers, or addresses.			
Type of Assistance	Each user is responsible for designing their own method for creating Beneficiary IDs, as well maintaining and adequately protecting their own auditable records which associate each Beneficiary ID with the individual family, or household whose			
▶ Beneficiary ID	income was determined (as appropriate and/or required under the rules of each CPD program.) Printouts from the Calculator for all programs except HOPWA will include both the Beneficiary ID and a blank space in which the Last Name			
Beneficiary Location	of the associated individual, family, or household can be written or otherwise inserted. Beneficiary ID: 100312 Number of household members: 2			
Income Determination Method				
Beneficiary Income	Note: If you need to change the number of household members, or ch delete this calculation or create a new calculation, on the Dashboard,	nange the Beneficia with a different Be	ary ID, you will need to either neficiary ID.	
Summary				
	< Previous		Con the second	

26

Beneficiary ID - Screen 2: HH Member Info

CDBG Annual Income Calculation

Beneficiary 100312
 ID:

🗰 DASHBOARD

ANNUAL INCOME

Type of Assistance

Beneficiary ID

Beneficiary Location

Senenciary Ecoulion

Income Determination Method

Beneficiary Income

Summary

The CPD Income Eligibility Calculator asks for "Member IDs" instead of "First Names" to help protect the privacy of applicants to CPD programs. Each Member ID you enter should be unique to an individual within the family or household associated with this Beneficiary ID. Printouts from the Calculator for all programs except HOPWA will include the Member IDs entered here along with a blank space in which the First Name of the associated individual can be written or otherwise inserted. DO NOT use any personal information to create Member ID(s), including but not limited to names, social security numbers, or addresses.

Each user is responsible for designing their own method for creating Member IDs, as well maintaining and adequately protecting their own auditable records which connect Member IDs to the associated individuals within the family or household whose income was determined (as appropriate and/or required under the rules of each CPD program.)

Income determinations are based on the gross income anticipated by all adults in the family or household in the next 12 months.

Please enter a Member ID for each member of the 100312 household and check ALL of the boxes that apply for each member. Please note, you will not be able to continue until all Beneficiary Member IDs are populated.

	#1	#2
Beneficiary Member ID	HH1	HH2
This member is a minor under the age of 15 years		
This member is a child age 18 or UNDER		
This member is a fulltime student OVER the age of 18 years		
This member is 62 years of age or older		
This member is a person (of any age) with disabilities		
This member is the head of household		
This member is the co-head of household		

< Previous



Beneficiary Location

CPD Income Eligi	bility Calculator			Change Password
CDBG Annual Income Ca	Iculation	• Beneficiary ID:	100312	🖺 Print
I DASHBOARD	Please select the location and income limit informatio	n applicable to thi	s household:	
ANNUAL INCOME	Indiana			
Type of Assistance	Area Fort Wayne, IN MSA	•		
Beneficiary ID	Applicable 2012 Income Limit for household size in a	rea		
Beneficiary Location	80%			
Income Determination Method	The 2012 80% Income Limit for a 2-member housel \$40,850. (Completed on October 8, 2012.)	hold in Fort Wayn	e, IN MSA (CBSA: METRO23060	1M23060) is
Beneficiary Income				
Summary	Please print this page for your files.			
	< Previous			Constant >

Income Determination Method

CDBG Annual Income Ca	Iculation	• Beneficiary ID:	100312
🗰 DASHBOARD	Examine source documentation of income for all members of this hour Is this income determination being conducted for housing in which Low	sehold. v Income Housing	Tax Credits are involved?
ANNUAL INCOME	⊘ Yes		
Type of Assistance			
Beneficiary ID	< Previous		Continue >
Beneficiary Location			
Income Determination Method			

Beneficiary Income – Screen 1: Income Definition

CDBG Annual Income Cal	lculation	• Beneficiary ID:	100312
a DASHBOARD	You may choose one of the following definitions of income to use whe household:	en calculating "ann	ual income" for the 100312
	 24 CFR Part 5 Annual Income IRS Form 1040 Adjusted Gross Income 		
Type of Assistance	 American Community Survey (ACS) 		
Beneficiary ID	< Previous		Continue >
Beneficiary Location			Ŀ
Income Determination Method			
► Beneficiary Income			

Beneficiary Income – Screen 2: Calculation Method (HH1 and HH2)

CDBG Annual Income Calculation

```
    Beneficiary 100312
    ID:
```

🔲 DASHBOARD	American Community Survey - Input	
	Beneficiary Member ID: HH1	
	HH1 HH2	
Type of Assistance	Wages, salary, communications, bonuses, or tips from all jobs. Report	\$
Beneficiary ID	amount before deductions for taxes, bonds, dues, or outer reins.	
Beneficiary Location	Self-employment income from own nonfarm businesses or farm businesses, including proprietorships and partnerships. Report NET income after business expenses.	\$
Income Determination		_
Beneficiary Income	Interest, dividends, net rental income, royalty income, or income from estates and trusts. Report even small amounts credited to an account.	\$
Summary	Social Security or Railroad Retirement.	\$ 9,600.00
	Supplemental Security Income (SSI).	\$
	Any public assistance or welfare payments from the state or local welfare office.	\$
	Retirement, survivor, or disability pensions. Do NOT include Social Security.	\$
	Any other sources of income received regularly such as Veterans' (VA) payments, unemployment compensation, child support or alimony. Do NOT include lump sum payments such as money from an inheritance or the sale of a home.	\$

< Previous

Save

Calculate >

CDBG Annual Income Calculation

• Beneficiary 100312 ID:

American Community Survey - Input DASHBOARD Beneficiary Member ID: HH2 ANNUAL INCOME HH1 HH2 Type of Assistance Wages, salary, commissions, bonuses, or tips from all jobs. Report 10,000.00 \$ amount before deductions for taxes, bonds, dues, or other items. Beneficiary ID Self-employment income from own nonfarm businesses or farm \$ businesses, including proprietorships and partnerships. Report NET Beneficiary Location income after business expenses. Income Determination Method Interest, dividends, net rental income, royalty income, or income from \$ estates and trusts. Report even small amounts credited to an Beneficiary Income account. Summary Social Security or Railroad Retirement. \$ 10,200.00 Supplemental Security Income (SSI). \$ Any public assistance or welfare payments from the state or local \$ welfare office. Retirement, survivor, or disability pensions. Do NOT include Social \$ Security. Any other sources of income received regularly such as s Veterans' (VA) payments, unemployment compensation, child support or alimony. Do NOT include lump sum payments such as money from an inheritance or the sale of a home.

< Previous

Save



Summary: Option to Download PDF

CDBG Annual Income Calcul	ation		• Beneficia ID:	ary 100312	
	American Community Survey - Summar	у			
IIII DASHBOARD		- -			oumload DDE file
ANNUAL INCOME					ownload PDF life
Type of Assistance	Beneficiary ID: 100312	Area, St	tate: Fort Wayne,	IN MSA, Indiana	
Beneficiary ID	Number of Members: 2	Income	Limit: \$40,850.0	10	
Beneficiary Location	Member IDs:	нн1	HH2	Subtotals of	
Income Determination Method				Line items	
Beneficiary Income	Wages, salary, commissions, bonuses, or tips from all jobs. Report amount before deductions for taxes, bonds, dues, or other	\$0.00	\$10,000.00	\$10,000.00	
Summary	items.				
	Self-employment income from own nonfarm businesses or farm businesses, including proprietorships and partnerships. Report NET income after business expenses.	\$0.00	\$0.00	\$0.00	
	Interest, dividends, net rental income, royalty income, or income from estates and trusts. Report even small amounts credited to an account.	\$0.00	\$0.00	\$0.00	
	Social Security or Railroad Retirement.	\$9,600.00	\$10,200.00	\$19,800.00	
	Supplemental Security Income (SSI).	\$0.00	\$0.00	\$0.00	
	Any public assistance or welfare payments from the state or local welfare office.	\$0.00	\$0.00	\$0.00	
	Retirement, survivor, or disability pensions. Do NOT include Social Security.	\$0.00	\$0.00	\$0.00	
	Any other sources of income received regularly such as Veterans' (VA) payments, unemployment compensation, child support or alimony. Do NOT include lump sum payments such as money from an inheritance or the sale of a home.	\$0.00	\$0.00	\$0.00	
	Total Annual Income	\$9,600.00	\$20,200.00	\$29,800.00	

Based upon the information submitted, the Annual Income of 100312 has been determined to be below the income limit for the area.



Save & Return to Dashboard

Sample PDF Summary Form for Records

U.S. Department of Housing and Urban Development Office of Community Planning and Development Income Eligibility Calculator

AMERICAN COMMUNITY SURVEY ANNUAL INCOME CALCULATION
Completed on 10/08/2012

Last Name:		Benefici	iary ID:	100312	
Area/State: Fort Wayne, IN MSA, Indiana	_2012_Income	Limit:	\$40,850.00	Number of Members:	2

First Names:				Subtotals of
Member IDs:	HH1	HH2		Line Items
Wages, salary, commissions, bonuses, or tips from all jobs. Report amount before deductions for taxes, bonds, dues, or other items.	\$0.00	\$10,000.00		\$10,000.00
Self-employment income from own nonfarm businesses or farm businesses, including proprietorships and partnerships. Report NET income after business expenses.	\$0.00	\$0.00		\$0.00
Interest, dividends, net rental income, royalty income, or income from estates and trusts. Report even small amounts credited to an account.				\$0.00
Social Security or Railroad Retirement.	\$9,600.00	\$10,200.00		\$19,800.00
Supplemental Security Income (SSI).	\$0.00	\$0.00		\$0.00
Any public assistance or welfare payments from the state or local welfare office.	\$0.00	\$0.00		\$0.00
Retirement, survivor, or disability pensions. Do NOT include Social Security.	\$0.00	\$0.00		\$0.00
Any other sources of income received regularly such as Veterans' (VA) payments, unemployment compensation, child support or alimony. Do NOT include lump sum payments such as money from an inheritance or the sale of a home.	\$0.00	\$0.00		\$0.00
ANNUAL GROSS INCOME	\$9,600,00	\$20,200,00		\$29,800.00

Based upon the information submitted, the Annual Income of ______ has been determined to be ______ below___ the income limit for this area.

Page 1 of 2

U.S. Department of Housing and Urban Development Office of Community Planning and Development Income Eligibility Calculator

AMERICAN COMMUNITY SURVEY ANNUAL INCOME CALCULATION Completed on 10/08/2012

Beneficiary ID: 100312

HEAD OF HOUSEHOLD					
Signature	Printed Name	Date			

OTHER BENEFICIARY ADULTS*				
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		
Signature	Printed Name	Date		

* Attach another copy of this page if additional signature lines are required.

PREPARER				
Signature	Printed Name	Date		

Page 2 of 2

NSP Income Calculation – Annual Income

Beneficiary ID – Screen 1: Beneficiary ID and Number of HH Members

CPD Income Elig	ibility Calculator		Change Password			
NSP Annual Income Calculation			1003122			
DASHBOARD	The CPD Income Eligibility Calculator asks for a "Beneficiary ID" instead of a "Last Name" to help protect the privacy applicants to CPD programs. The Beneficiary ID you enter should be unique, will be included on the Calculator screer					
ANNUAL INCOME	performed is that will be the key data element necessary to hater min, complete, and of ear the income determination performed for that beneficiary within the Calculator. DO NOT use any personal information to create a Beneficiary ID, including but not limited to names, social security numbers, or addresses.					
► Beneficiary ID	Beneficiary ID Each user is responsible for designing their own method for creating Beneficiary IDs, as well maintaining and adequate					
Beneficiary Location	protecting their own auditable records which associate each Beneficiary ID with the individual, family, or household whose income was determined (as appropriate and/or required under the rules of each CPD program.) Printouts from the Calculator for all programs except HOPWA will include both the Beneficiary ID and a blank space in which the Last Name					
Income Determination Method	of the associated individual, family, or household can be written or otherwise inserted. Beneficiary ID: 1003122					
Beneficiary Income	Number of household members: 4					
Summary	Note: If you need to change the number of household members, or cl delete this calculation or create a new calculation, on the Dashboard,	nange the Beneficia with a different Ber	ny ID, you will need to either neficiary ID.			



Beneficiary ID - Screen 2: HH Member Info

NSP Annual Income Calculation	Beneficiary	1003122
	ID:	

📅 DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination

Method

Beneficiary Income

Summary

The CPD Income Eligibility Calculator asks for "Member IDs" instead of "First Names" to help protect the privacy of applicants to CPD programs. Each Member ID you enter should be unique to an individual within the family or household associated with this Beneficiary ID. Printouts from the Calculator for all programs except HOPWA will include the Member IDs entered here along with a blank space in which the First Name of the associated individual can be written or otherwise inserted. DO NOT use any personal information to create Member ID(s), including but not limited to names, social security numbers, or addresses.

Each user is responsible for designing their own method for creating Member IDs, as well maintaining and adequately protecting their own auditable records which connect Member IDs to the associated individuals within the family or household whose income was determined (as appropriate and/or required under the rules of each CPD program.)

Income determinations are based on the gross income anticipated by all adults in the household in the next 12 months.

Please enter a Member ID for each member of the 1003122 household and check ALL of the boxes that apply for each member. Please note, you will not be able to continue until all Beneficiary Member IDs are populated.

	#1	#2	#3	#4
Beneficiary Member ID	HH1	HH2	HH3	HH4
This member is a minor under the age of 15 years				
This member is a child age 18 or UNDER				
This member is a fulltime student OVER the age of 18 years				
This member is 62 years of age or older				
This member is a person (of any age) with disabilities				
This member is the head of household				
This member is the co-head of household				

< Previous



Beneficiary Location

NSP Annual Income Calc	ulation	• Beneficiary ID:	1003122	🖺 Print
DASHBOARD	Please select the location and income limit informatio	n applicable to this	household:	
Beneficiary ID	Area Chicago-Joliet-Naperville, IL HUD Metro FMR Area	a 🔻		
Beneficiary Location Income Determination Method	Applicable 2012 Income Limit for household size in an 120%	rea		
Beneficiary Income	The 2012 120% Income Limit for a 4-member house (CBSA: METRO16980M16980) is \$90,950. (Complet	ehold in Chicago aed on October 8, 2	Joliet-Naperville, IL HUD Metro FN 012.)	IR Area
	Please <u>print</u> this page for your files.			
	< Previous			Cont

Income Determination Method

NSP Annual Income Calc	ulation	• Beneficiary ID:	1003122	
I DASHBOARD	What type of NSP assistance is being provided to this beneficiary? Homebuyer 			
ANNUAL INCOME	Rental Demolition			
Beneficiary ID	 Public Facility (NSP 1) 			
Beneficiary Location				
Income Determination Method	< Previous		l	Cont >

Beneficiary Income – Screen 1: Income Definition

NSP Annual Income Cale	culation	• Beneficiary ID:	1003122
IIII DASHBOARD	You may choose one of the following definitions of income to use whe household:	n calculating "ann	ual income" for the 1003122
ANNUAL INCOME	 24 CFR Part 5 Annual Income IRS Form 1040 Adjusted Gross Income 		
Beneficiary ID	American Community Survey (ACS)		
Beneficiary Location	< Previous		Continue >
Income Determination Method			- <u>b</u>
Beneficiary Income			

Beneficiary Income - Screen 2: Calculation Method (HH1 and HH2)

IRS 1040 Adjusted Gross Income - Input

Deductions" line items below.

NSP Annual Income Calculation

• Beneficiary 1003122 ID:

DASHBOARD ANNUAL INCOME Beneficiary ID Beneficiary Location Income Determination Method Beneficiary Income Summary

eneficiary Member ID: H	HH1				
НН1 Н		ннз	HH4		
Income	\odot				
Wages, salaries, tip	s, etc.				\$ 40,000.00
Overtime/Bonus	з рау				\$
Raises/COLAs					\$
Taxable interest					\$ 20.00
Ordinary dividends					\$
Taxable refunds, cre	edits, or offsets	of state and	local income ta	xes	\$
Alimony received					\$
Business income or	(loss)				\$
Capital gain or (loss)				\$
Other gains or (loss	es)				\$
Taxable amount of	RA distributions	s			\$
Taxable amount of I	Pensions and a	nnuities			\$
Rentals real estate, etc.	royalties, partn	erships, S c	orporations, trus	ts,	\$

Note: When using the IRS Form 1040 definition to determine an applicant's annual income, users must use the most

current version of IRS Form 1040—the version filed for current year tax reporting purposes. While this online worksheet is a general representation of the IRS Form 1040, it is not updated annually to reflect all changes in the Income and Deductions line items each tax year. The user is advised to consult the IRS Web site at <u>irs.gov</u> for the most current

version of and the instructions for this form. Income or Deduction items included in the most current IRS Form 1040, but not specifically reflected in the worksheet below, may be accommodated using the "Other Income" and "Other

Farm income or (loss)	\$
Unemployment compensation	\$
Taxable amount of Social security benefits	\$
Other income (if any)	\$
Adjusted Gross Income	
Educator expenses	\$
Certain business expenses of reservists, performing artists, and fee- basis government officials	\$
Health savings account deduction	\$
Moving expenses	\$
Deductible part of self-employment tax	\$
Self-employed SEP, SIMPLE, and qualified plans	\$
Self-employed health insurance deduction	\$
Penalty on early withdrawal of savings	\$
Alimony paid	\$
IRA deduction	\$
Student loan interest deduction	\$ 1,000.00
Tuition and fees	\$
Domestic production activities deduction	\$
Other Deductions (if any)	\$

< Previous

Save

Calculate >

NSP Annual Income Calculation

Beneficiary 1003122
 ID:

🛅 DASHBOARD

Beneficiary ID

Beneficiary Location

Income Determination

Beneficiary Income

ANNUAL INCOME

IRS 1040 Adjusted Gross Income - Input

Note: When using the IRS Form 1040 definition to determine an applicant's annual income, users must use the most current version of IRS Form 1040—the version filed for current year tax reporting purposes. While this online worksheet is a general representation of the IRS Form 1040, it is not updated annually to reflect all changes in the Income and Deductions line items each tax year. The user is advised to consult the IRS Web site at <u>irs.gov</u> for the most current version of and the instructions for this form. Income or Deduction items included in the most current IRS Form 1040, but not specifically reflected in the worksheet below, may be accommodated using the "Other Income" and "Other Deductions" line items below.

Beneficiary Member ID: HH2

	HH1	HH2	HH3	HH4		
Inc	ome					
١	Nages, sala	ries, tips, etc.				\$ 20,000.00
	Overtime	e/Bonus pay				\$
	Raises/0	COLAs				\$
٦	Faxable inte	rest				\$
(Ordinary divi	idends				\$
٦	Faxable refu	nds, credits, or a	offsets of state and	d local income ta	xes	\$
ŀ	Alimony rece	eived				\$
E	Business inc	come or (loss)				\$
(Capital gain	or (loss)				\$
(Other gains	or (losses)				\$
٦	Faxable amo	ount of IRA distril	butions			\$
٦	Faxable amo	ount of Pensions	and annuities			\$
F	Rentals real etc.	estate, royalties,	partnerships, S o	corporations, trus	its,	\$

Summary

Method

Farm income or (loss)	\$
Unemployment compensation	\$
Taxable amount of Social security benefits	\$
Other income (if any)	\$
Adjusted Gross Income	
Educator expenses	\$
Certain business expenses of reservists, performing artists, and fee- basis government officials	\$
Health savings account deduction	\$
Moving expenses	\$
Deductible part of self-employment tax	\$
Self-employed SEP, SIMPLE, and qualified plans	\$
Self-employed health insurance deduction	\$
Penalty on early withdrawal of savings	\$
Alimony paid	\$
IRA deduction	\$
Student loan interest deduction	\$
Tuition and fees	\$
Domestic production activities deduction	\$
Other Deductions (if any)	\$

< Previous





Summary: Option to Download PDF

NOTE: Use scroll bar at bottom to see all columns

NSP Annual Ir	ncome Calcul	ation			Beneficiary ID:	1003122	
🛅 DASHBOAR	D	IRS 1040 Adjusted Gross	income - Summary	,			
ANNUAL IN	COME					Down	load PDF file
Beneficiary ID		Beneficiary ID: 1003122		Area, State	e: Chicago-Joliet-N Area, Illinois	aperville, IL HUD	Metro FMR
Beneficiary Locat	ion	Number of Members: 4		Income Li	mit: \$90,950.00		
Income Determir Method							
Beneficiary Incor	Member IDs		HHI	HH2	ннз	HH4	Subtotals of Line Items
Summary	Wages, salarie	s, tips, etc.	\$40,000.00	\$20,000.00	\$0.00	\$0.00	\$60,000.0
	Overtime/Bo	onus pay	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Raises/COL	As	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Taxable interes	st	\$20.00	\$0.00	\$0.00	\$0.00	\$20.0
	Ordinary divide	ends	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Taxable refund and local incom	is, credits, or offsets of state ne taxes	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Alimony receiv	ed	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Business incom	ne or (loss)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Capital gain or	(loss)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Other gains or	(losses)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Taxable amour	nt of IRA distributions	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Taxable amour	nt of Pensions and annuities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Rentals real es S corporations	tate, royalties, partnerships, , trusts, etc.	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Farm income o	or (loss)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Unemployment	t compensation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Taxable amour	nt of Social security benefits	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Other income (if any)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
	Subtotal of Inco	ome	\$40,020.00	\$20,000.00	\$0.00	\$0.00	\$60,020.0

ADJUSTED GROSS INCOME	\$39,020.00	\$20,000.00	\$0.00	\$0.00	\$59,020.00
Sublotal of Deductions	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
Other Deductions (if any)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Domestic production activities deduction	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
Tuition and fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
Student loan interest deduction	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
IRA deduction	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Alimony paid	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
Penalty on early withdrawal of savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
Self-employed health insurance deduction	\$0.00	S0.00	\$0.00	\$0.00	\$0.0
Self-employed SEP, SIMPLE, and qualified plans	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
Deductible part of self-employment tax	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
Moving expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
Health savings account deduction	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Certain business expenses of reservists, performing artists, and fee-basis government officials	\$0.00	\$0.00	\$0.00	S0.00	\$0.00
Educator expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0

Scroll to view all columns

Based upon the information submitted, the Annual Income of 1003122 has been determined to be below the income limit for the area.

< Previous

Save & Return to Dashboard

Sample PDF Summary Form for Records

U.S. Department of Housing and Urban Development Office of Community Planning and Development Income Eligibility Calculator

IRS FORM 1040 ADJUSTED GROSS INCOME CALCULATION Completed on 10/08/2012

Last Name:		Beneficiary	ID:	1003122	
Area/State: Chicago-Joliet-Naperville, IL HUD Metro FMR Area, Illinois	Income	Limit: \$9	0,950.00	Number of Mem	bers: 4
·	<u> </u>				
First Names:					Subtotals of Line
Member IDs:	HH1	HH2	ННЗ	HH4	Items
Wages, Salaries, Tips, etc.	\$40,000.00	\$20,000.00	\$0.00	\$0.00	\$60,000.00
Taxable interest	\$20.00	\$0.00	\$0.00	\$0.00	\$20.00
Ordinary dividends	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Taxable refunds, credits, or offsets of state and local income taxes	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Alimony received	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Business income or (loss)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Capital gain or (loss)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other gains or (losses)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Taxable amount of IRA distributions	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Taxable amount of Pensions and annuities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Rental real estate, royalties, partnerships, S corporations, trusts. etc.	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Farm income or (loss)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Unemployment compensation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Taxable amount of Social security benefits	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other income	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal of Income	\$40,020.00	\$20,000.00	\$0.00	\$0.00	\$60,020.00
Educator expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Certain business expenses of reservists, performing artists, and fee-basis government officials	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Health savings account deduction	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Moving expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Deductible part of self-employment tax	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Self-employed SEP, SIMPLE, and qualified plans	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Self-employed health insurance deduction	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Penalty on early withdrawal of savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Alimony paid	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
IRA deduction	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Student loan interest deduction	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
Tuition and fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Domestic production activities deduction	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other Deductions	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal of Deductions	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
ADJUSTED GROSS INCOME	\$39,020.00	\$20,000.00	\$0.00	\$0.00	\$59,020,00

Based upon the information submitted, the Annual Income of <u>1003122</u> has been determined to be <u>below</u> the income limit for this area.

Page 1 of 2

U.S. Department of Housing and Urban Development Office of Community Planning and Development Income Eligibility Calculator

IRS FORM 1040 ADJUSTED GROSS INCOME CALCULATION Completed on 10/08/2012

Beneficiary ID: 1003122

		HEAD OF HOUSEHOLD	
Γ	Signature	Printed Name	Date

	OTHER BENEFICIARY ADULTS*	
Signature	Printed Name	Date
Attach another conv of this page if additional	signature lines are required	

Signature Printed Name Date	

Page 2 of 2