

CPD Income Eligibility Calculator Demo Screenshots, November 15, 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	10
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	18
Sample PDF Summary Form for Records	19
HOME Income Calculation – Rental Assistance.....	21
Approved Rent/Utility	21
Rent Model	21
Rent Standard	22


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).....	30
Summary: Option to Download PDF	32
Sample PDF Summary Form for Records	33
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	36
Beneficiary Location.....	37
Income Determination Method	37
Beneficiary Income – Screen 1: Income Definition.....	38
Beneficiary Income – Screen 2: Calculation Method (HH1 and HH2).....	39
Summary: Option to Download PDF	43
Sample PDF Summary Form for Records	45

Registration/Log-In



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CPD Income Eligibility Calculator

Welcome to CPD's Income Eligibility Calculator, an interactive tool that makes determining the income eligibility and assistance amounts for beneficiaries of CPD programs as easy as 1-2-3. Simply enter the requested data and this calculator will work behind the scenes to generate a summary of results for each beneficiary. You should then print out the summary and include it as part of the beneficiary's file.

The calculator currently performs income eligibility and assistance amount calculations for the following HUD CPD programs:

- Brownfield Economic Development Initiative (BEDI)
- Community Development Block Grant Program (CDBG)
- CDBG Disaster Recovery Assistance
- HOME Investment Partnerships Program (HOME)
- Housing Opportunities for Persons with AIDS (HOPWA)
- Neighborhood Stabilization Program (NSP)
- Section 108 Loan Guarantee Program
- Self-Help Homeownership Opportunity (SHOP)

PLEASE ALLOW AT LEAST 15 MINUTES TO COMPLETE EACH APPLICANT'S CALCULATION

Already Registered?
Sign in now and complete a previous calculation or start a new one.

[Sign In ►](#)

Need to Register for the CPD Income Eligibility Calculator?

[Register Now ►](#)

By registering with onecpd.info you agree to our [liability and privacy policy](#).

Income Calculator Dashboard

 **Dashboard**

[Change Password](#)

Select a program and start a new calculation

Select One


Start

CDBG Calculations

[New Calculation](#)

Show 10 entries

Search:

Beneficiary ID	No. of Members	Location	Calculation Type	Calculation Date	Purge Date	Status	Eligibility Status	Delete
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

[New Calculation](#)

Show 10 entries

Search:

Beneficiary ID	No. of Members	Location	Calculation Type	Calculation Date	Purge Date	Status	Eligibility Status	Delete
92812	4	Columbus, OH HUD Metro FMR Area	Annual	10/05/2012	11/05/2013	Complete	Eligible	
92812	4	Columbus, OH HUD Metro FMR Area	Adjusted	10/05/2012	11/05/2013	Complete		
92812	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

NSP Calculations

[New Calculation](#)

Show 10 entries

Search:

Beneficiary ID	No. of Members	Location	Calculation Type	Calculation Date	Purge Date	Status	Eligibility Status	Delete
1003122	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

[Clear All](#)

Delete

HOME Income Calculation – Annual Income

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

HOME Annual Income Calculation

Beneficiary ID: 92812

DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination Method

Beneficiary Income

Summary

ADJUSTED INCOME

Dependents

The CPD Income Eligibility Calculator asks for a "Beneficiary ID" instead of a "Last Name" to help protect the privacy of applicants to CPD programs. The Beneficiary ID you enter should be unique, will be included on the Calculator screens and printouts, and will be the key data element necessary to later find, complete, and/or edit 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.**

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 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 of the associated individual, family, or household can be written or otherwise inserted.

Beneficiary ID: 92812

Number of household members: 4

Note: If you need to change the number of household members, or change the Beneficiary ID, you will need to either delete this calculation or create a new calculation, on the Dashboard, with a different Beneficiary ID.

< Previous

Continue

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

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	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
This member is a fulltime student OVER the age of 18 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This member is 62 years of age or older	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This member is a person (of any age) with disabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This member is the head of household	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This member is the co-head of household	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

< Previous

Continue

Beneficiary Location

HOME Annual Income Calculation

Beneficiary ID: 92812

Print

DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination Method

Beneficiary Income

Summary

ADJUSTED INCOME

Dependents

Please select the location and income limit information applicable to this household:

State
Ohio

Area
Columbus, OH HUD Metro FMR Area

Applicable 2012 Income Limit for household size in area
50%

The 2012 50% Income Limit for a 4-member household in Columbus, OH HUD Metro FMR Area (CBSA: METRO18140M18140) is \$33,750. (Completed on October 5, 2012.)

Please [print](#) this page for your files.

< Previous

Continue >

Income Determination Method – Screen 1: Previously Determined Eligible

HOME Annual Income Calculation

Beneficiary ID: 92812

DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination Method

Has this household previously been determined income eligible?

☐ Yes ☒ No

< Previous

Continue >

Income Determination Method – Screen 2: Type of Assistance

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

Approved Rent/ Utility

What type of HOME assistance is being provided to this household?

☐ Homeowner Rehabilitation

☐ Homebuyer

☐ Rental*

☒ Tenant-based Rental Assistance*

*** 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 exclusions apply to annual income increases resulting from the following:**

- ▶ Employment of a family member who is a person with disabilities and who was previously unemployed for one or more years prior to employment;
- ▶ Increased earnings by a family member who is a person with disabilities during participation in any economic self-sufficiency or other job training program; or
- ▶ New employment or increased earnings of a family member who is a person with disabilities, during or 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 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 assistance--provided that the total amount over a six-month period is at least \$500.

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.

< Previous

Continue >

Income Determination Method – Screen 3: LIHTC

HOME Annual Income Calculation

Beneficiary ID: 92812

DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination Method

Examine source documentation of income for all members of this household.

Is this income determination being conducted for housing in which Low Income Housing Tax Credits are involved?

☐ Yes ☒ No

< Previous

Continue >

Beneficiary Income – Screen 1: Income Definition

CPD Income Eligibility Calculator

[Change Password](#)

HOME Annual Income Calculation

Beneficiary ID: 92812

DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination
Method

► Beneficiary Income

You may choose one of the following definitions of income to use when calculating "annual income" for the 92812 household:

- ☒ 24 CFR Part 5 Annual Income
☐ IRS Form 1040 Adjusted Gross Income

< Previous

Continue >

Beneficiary Income – Screen 2: Calculation Method

CPD Income Eligibility Calculator

[Change Password](#)

HOME Annual Income Calculation

Beneficiary ID: 92812

DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination
Method

► Beneficiary Income

24 CFR Part 5 Annual Income

Applicable Passbook Rate

0.0060 %

Choose one of the following methods to calculate "annual income" for the 92812 household using the 24 CFR Part 5 definition of income:

- ☐ Short Form Method ☒ Guided (Step-by-Step) Method

< Previous

Continue >

Beneficiary Income – Screen 3: Select HH Member

HOME Annual Income Calculation

Beneficiary ID: 92812

DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination Method

Beneficiary Income

24 CFR Part 5 Annual Income

Select a Beneficiary Member ID to begin calculating assets and anticipated annual income.

HH1

< Previous

Continue >

Beneficiary Income – Screen 4: Add/View Assets

HOME Annual Income Calculation

Beneficiary ID: 92812

DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination Method

Beneficiary Income

24 CFR Part 5 Annual Income

Asset for Beneficiary Member HH1.

Asset Type	Asset Description	Current Cash Value	Actual Income from Assets
		\$	\$

Cancel

Save

HOME Annual Income Calculation

Beneficiary ID: 92812

DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination Method

Beneficiary Income

24 CFR Part 5 Annual Income

Calculate assets for Beneficiary Member HH1.

Asset Type	Asset Description	Current Cash Value	Actual Income from Assets	
Cash	Savings	\$2,000.00	\$10.00	<div>Edit</div> <div>Delete</div>

+ Add Another

< Previous

Continue

24 CFR Part 5 Inclusions & Exclusions

Beneficiary Income – Screen 5: Job and Wages

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

Approved Rent/ Utility

Rental Model

Rent Standard

Welfare Rent

Summary

24 CFR Part 5 Annual Income

Calculate wages, overtime, bonuses, and benefits for Beneficiary Member ID: HH1

Add a job for this member?
☒ Yes ☐ No

Description

Wages/Salaries
☐ Hourly ☐ Annual

Overtime/Bonuses

Total Overtime/Bonus Pay, Month 1	Total Overtime/Bonus Pay, Month 7
\$	\$
Total Overtime/Bonus Pay, Month 2	Total Overtime/Bonus Pay, Month 8
\$	\$
Total Overtime/Bonus Pay, Month 3	Total Overtime/Bonus Pay, Month 9
\$	\$
Total Overtime/Bonus Pay, Month 4	Total Overtime/Bonus Pay, Month 10
\$	\$
Total Overtime/Bonus Pay, Month 5	Total Overtime/Bonus Pay, Month 11
\$	\$
Total Overtime/Bonus Pay, Month 6	Total Overtime/Bonus Pay, Month 12
\$	\$

Raises

All forms of income earned by program applicants must be accounted for. In addition to base salary, this will include raises and annual cost of living adjustments (COLAs). Use the data entry fields below to enter information about any anticipated increase in annual income the applicant will experience over the next 12 months due to a raise in his or her hourly wage or annual salary and/or an annual COLA.

☐ Check if member anticipates a raise or COLA increase.

< Previous

Save

Continue >

Beneficiary Income – Screen 6: Benefits and Pensions

HOME Annual Income Calculation		Beneficiary ID: 92812
DASHBOARD	24 CFR Part 5 Annual Income	
ANNUAL INCOME	Does Beneficiary Member HH1 receive Benefits and/or Pensions?	
Beneficiary ID	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Beneficiary Location		
Income Determination Method		
Beneficiary Income	< Previous	Continue >

Beneficiary Income – Screen 7: Public Assistance

HOME Annual Income Calculation		Beneficiary ID: 92812
DASHBOARD	24 CFR Part 5 Annual Income	
ANNUAL INCOME	Does Beneficiary Member HH1 receive Public Assistance?	
Beneficiary ID	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Beneficiary Location		
Income Determination Method		
Beneficiary Income	< Previous	Continue >

Beneficiary Income – Screen 8: Other Income

HOME Annual Income Calculation		Beneficiary ID: 92812
DASHBOARD	24 CFR Part 5 Annual Income	
ANNUAL INCOME	Does Beneficiary Member HH1 earn Other Income?	
Beneficiary ID	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Beneficiary Location		
Income Determination Method		
Beneficiary Income	< Previous	Continue >

Beneficiary Income – Screen 9: HH Member Summaries

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

Approved Rent/ Utility

Rental Model

24 CFR Part 5 Assets and Anticipated Income Summary

HH1HH2HH3HH4

Summary for Beneficiary Member HH1

Assets

EDIT

Asset Description	Asset Type	Current Cash Value	Actual Income from Assets
Savings	Cash	\$2,000.00	\$10.00

Jobs

ADD JOB

Sanitation

VIEW/EDITDELETE

Benefits and/or Pensions

No Benefits and/or Pensions entered

Public Assistance

No Public Assistance entered

Other Income

No Other Income entered

Select continue to add assets and anticipated annual income data for another beneficiary member.

Continue >

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

HOME Annual Income Calculation

Beneficiary ID: 92812

DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination Method

Beneficiary Income

24 CFR Part 5 Annual Income

Calculate assets and anticipated annual income for another beneficiary member?

☐ Yes ☒ No

< Previous

Continue >

Summary: Option to Download PDF

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

Approved Rent/ Utility

Rental Model

Rent Standard

Welfare Rent

Summary

24 CFR Part 5 Annual Income Summary

[Download PDF file](#)

Beneficiary ID: 92812

Area, State: Columbus, OH HUD Metro FMR Area, Ohio

Number of Members: 4

Income Limit: \$33,750.00

> Assets

Member ID	Asset Type(s)	Current Cash Value	Actual Income from Assets
HH1	Cash	\$2,000.00	\$10.00
HH2		\$0.00	\$0.00
HH3		\$0.00	\$0.00
HH4		\$0.00	\$0.00
NET CASH VALUE OF ASSETS		\$2,000.00	

TOTAL ACTUAL INCOME FROM ASSETS	\$10.00
---------------------------------	---------

IMPUTED INCOME FROM ASSETS (only if the Net Cash Value of Assets is greater than \$5,000):	\$0.00
---	--------

> Anticipated Annual Income

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 ANNUAL 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.

[< Previous](#)

[Save & Return to Dashboard](#)

[Continue to Adjusted Income >](#)

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 Members: 4	4. Area/State: Columbus, OH HUD Metro FMR Area, Ohio	5. 2012 Income Limit: \$33,750.00		
ASSETS				
First Names	Member IDs	Asset Description	Current Cash Value of Assets	Actual Income from Assets
	HH1	Cash	\$2,000.00	\$10.00
	HH2		\$0.00	\$0.00
	HH3		\$0.00	\$0.00
	HH4		\$0.00	\$0.00
6. Net Cash Value of Assets			6. \$2,000.00	
7. Total Actual Income from Assets				7. \$10.00
8. Imputed Income from Assets (only if the Net Cash Value of Assets is greater than \$5,000):				8. \$0.00

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 INCOME						
First Names	Member IDs	a. Wages/ Salaries	b. Benefits/ Pensions	c. Public Assistance	d. Other Income	e. 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	
9. Totals		a. \$30,000.00	b. \$0.00	c. \$0.00	d. \$0.00	e. \$10.00
10. Enter total of items from 9a through 9e. This is Annual Income .						10. \$30,010.00

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

COMPLETE SIGNATURES ON NEXT PAGE

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 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

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

PREPARER		
Signature	Printed Name	Date

HOME Income Calculation – Adjusted Income

Dependents

HOME Adjusted Income Calculation		Beneficiary ID: 92812
DASHBOARD	Number of Dependents	
+ ANNUAL INCOME	How many dependents are in this household?	
- ADJUSTED INCOME	<input type="text" value="2"/>	
Note: \$480 is subtracted from Annual Gross Income for each dependent.		
Dependents		
Childcare Expenses		
Continue >		

Childcare Expenses

HOME Adjusted Income Calculation		Beneficiary ID: 92812
DASHBOARD	Childcare Expenses	
+ ANNUAL INCOME	Enter the amount of unreimbursed childcare expenses anticipated for this household in the coming year.	
- ADJUSTED INCOME	\$ <input type="text" value="0.00"/>	
Childcare Expenses		
< Previous		
Continue >		

Disability Expenses

HOME Adjusted Income Calculation		Beneficiary ID: 92812
DASHBOARD	Disability Expenses	
+ ANNUAL INCOME	Enter the amount of unreimbursed disability expenses anticipated for this household in the coming year.	
- ADJUSTED INCOME	\$ <input type="text" value="0.00"/>	
Disability Expenses		
< Previous		
Continue >		

Medical Expenses

HOME Adjusted Income Calculation

Beneficiary ID: 92812

DASHBOARD

+ ANNUAL INCOME

- ADJUSTED INCOME

Dependents

Childcare Expenses

Disability Expenses

► Medical Expenses

Medical Expenses

Enter the amount of unreimbursed medical expenses anticipated for this household for the coming year.

\$

< Previous

Continue >



Summary: Option to Download PDF

HOME Adjusted Income Calculation Summary		Beneficiary ID: 92812
		Download PDF file
DASHBOARD	Adjusted Income Calculation Summary	
+ ANNUAL INCOME		
- ADJUSTED INCOME		
Dependents		
Childcare Expenses		
Disability Expenses		
Medical Expenses		
► Summary		
- TBRA		
Approved Rent/ Utility		
Rental Model		
Rent Standard		
Welfare Rent		
Summary		
1. Annual Income (based on the Part 5 Annual Income definition): 1. \$30,010.00		
2. Number of household members (excluding head or spouse) under 18, disabled, or full-time student: 2. 2		
3. Dependent deduction (line 2 multiplied by \$480) 3. \$960.00		
4. Child care expenses deduction (reasonable child care expenses for children age 12 and under): 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		
8. Amount earned by household member enabled to work as a result of disability assistance expenses (No member is selected): 8. \$0.00		
9. Disability assistance allowance (lesser of lines 7 or 8): 9. \$0.00		
10. Total medical expenses (elderly households only): 10. \$0.00		
11. Allowable medical expenses (elderly households only):		
<ul style="list-style-type: none">• 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		
< Previous Save & Return to Dashboard Continue to Rental Assistance >		

Sample PDF Summary Form for Records

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

1. Annual Income (based on the {24 CFR Part 5/IRS 1040/ACS} definition):	1. \$30,010.00
2. Number of household members (excluding head or spouse) under 18, disabled, or full-time student:	2. 2
3. Dependent deduction (line 2 multiplied by \$480):	3. \$960.00
4. Child care expenses deduction (reasonable child care expenses for children age 12 and under):	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
8. Amount earned by household member enabled to work as a result of disability assistance expenses (No member is selected):	8. \$0.00
9. Disability assistance allowance (lesser of lines 7 or 8):	9. \$0.00
10. Total medical expenses (elderly households only):	10. \$0.00
11. Allowable medical expenses (elderly households only): <ul style="list-style-type: none">• 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

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

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

PREPARER		
Signature	Printed Name	Date

HOME Income Calculation – Rental Assistance

Approved Rent/Utility

HOME Rental Assistance Calculation		Beneficiary ID: 92812
DASHBOARD	Approved Rent/Utility	
+ ANNUAL INCOME	Enter the approved monthly rent charged by the owner for this unit.	
+ ADJUSTED INCOME	\$ <input type="text" value="800.00"/>	
- TBRA	Enter the monthly Utility allowance for this unit.	
▶ Approved Rent/ Utility	\$ <input type="text" value="100.00"/>	
Rental Model	Continue >	

Rent Model

HOME Rental Assistance Calculation		Beneficiary ID: 92812
DASHBOARD	Rental Model	
+ ANNUAL INCOME	Select the method the PJ uses to determine the TBRA subsidy.	
+ ADJUSTED INCOME	<input type="radio"/> Section 8 Rental Certificate model (fixed tenant payment)	
- TBRA	<input checked="" type="radio"/> Section 8 Rental Voucher model (fixed PJ payment)	
▶ Rental Model	<input type="radio"/> Another model	
Approved Rent/ Utility	< Previous	Continue >

Rent Standard

HOME Rental Assistance Calculation

Beneficiary ID: 92812

DASHBOARD

+ ANNUAL INCOME

+ ADJUSTED INCOME

- TBRA

Approved Rent/ Utility

Rental Model

► Rent Standard

Rent Standard

Enter the PJ's rent standard for the unit size applicable to this household.

\$

< Previous

Continue >

Summary: Option to Download PDF

HOME Rental Assistance Calculation Summary

Beneficiary ID:

92812

Download PDF file

DASHBOARD

ANNUAL INCOME

ADJUSTED INCOME

TBRA

Approved Rent/ Utility

Rental Model

Rent Standard

Welfare Rent

Summary

Rental Assistance Calculation Summary - Rental Voucher Model

(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

< 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

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
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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

CDBG Income Calculation – Annual Income

Type of Assistance

CDBG Annual Income Calculation

Beneficiary ID: 100312

DASHBOARD

ANNUAL INCOME

Type of Assistance

Beneficiary ID

Beneficiary Location

Income Determination Method

Beneficiary Income

What type of CDBG national objective is being met?

☒ Low/Mod - Housing

☐ Low/Mod - Jobs

☐ Low/Mod - Limited Clientele

☐ Low/Mod - Limited Clientele - Presumed Benefit

☐ Low/Mod - Area Basis

☐ Slum/Blight - Area Basis

☐ Slum/Blight - Spot Basis

☐ Slum/Blight - Urban Renewal

☐ Urgent Need

< Previous

Continue >

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

CDBG Annual Income Calculation

Beneficiary ID: 100312

DASHBOARD

ANNUAL INCOME

Type of Assistance

Beneficiary ID

Beneficiary Location

Income Determination Method

Beneficiary Income

Summary

The CPD Income Eligibility Calculator asks for a "Beneficiary ID" instead of a "Last Name" to help protect the privacy of applicants to CPD programs. The Beneficiary ID you enter should be unique, will be included on the Calculator screens and printouts, and will be the key data element necessary to later find, complete, and/or edit 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.**

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 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 of the associated individual, family, or household can be written or otherwise inserted.

Beneficiary ID: 100312

Number of household members: 2

Note: If you need to change the number of household members, or change the Beneficiary ID, you will need to either delete this calculation or create a new calculation, on the Dashboard, with a different Beneficiary ID.

< Previous

Continue >

Beneficiary ID – Screen 2: HH Member Info

CDBG Annual Income Calculation

Beneficiary ID: 100312

DASHBOARD

ANNUAL INCOME

Type of Assistance

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 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	<input type="checkbox"/>	<input type="checkbox"/>
This member is a child age 18 or UNDER	<input type="checkbox"/>	<input type="checkbox"/>
This member is a fulltime student OVER the age of 18 years	<input type="checkbox"/>	<input type="checkbox"/>
This member is 62 years of age or older	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
This member is a person (of any age) with disabilities	<input type="checkbox"/>	<input type="checkbox"/>
This member is the head of household	<input checked="" type="checkbox"/>	<input type="checkbox"/>
This member is the co-head of household	<input type="checkbox"/>	<input checked="" type="checkbox"/>

< Previous

Continue >

Beneficiary Location

CPD Income Eligibility Calculator

[Change Password](#)

CDBG Annual Income Calculation		Beneficiary ID: 100312	Print
DASHBOARD	Please select the location and income limit information applicable to this household:		
ANNUAL INCOME	State <input type="text" value="Indiana"/>		
Type of Assistance	Area <input type="text" value="Fort Wayne, IN MSA"/>		
Beneficiary ID	Applicable 2012 Income Limit for household size in area <input type="text" value="80%"/>		
Beneficiary Location	The 2012 80% Income Limit for a 2-member household in Fort Wayne, IN MSA (CBSA: METRO23060M23060) is \$40,850. (Completed on October 8, 2012.)		
Income Determination Method	Please print this page for your files.		
Beneficiary Income			
Summary			
< Previous		Continue >	

Income Determination Method

CDBG Annual Income Calculation		Beneficiary ID: 100312
DASHBOARD	Examine source documentation of income for all members of this household.	
ANNUAL INCOME	Is this income determination being conducted for housing in which Low Income Housing Tax Credits are involved?	
Type of Assistance	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Beneficiary ID		
Beneficiary Location		
Income Determination Method		
< Previous		Continue >

Beneficiary Income – Screen 1: Income Definition

CDBG Annual Income Calculation		Beneficiary ID: 100312
<div><div>DASHBOARD</div><div>ANNUAL INCOME</div><div>Type of Assistance</div><div>Beneficiary ID</div><div>Beneficiary Location</div><div>Income Determination Method</div><div>► Beneficiary Income</div></div>	<p>You may choose one of the following definitions of income to use when calculating "annual income" for the 100312 household:</p> <ul style="list-style-type: none"><input type="radio"/> 24 CFR Part 5 Annual Income<input type="radio"/> IRS Form 1040 Adjusted Gross Income<input checked="" type="radio"/> American Community Survey (ACS) <div><div>< Previous</div><div>Continue ></div></div>	

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

CDBG Annual Income Calculation

Beneficiary ID: 100312

DASHBOARD

ANNUAL INCOME

Type of Assistance

Beneficiary ID

Beneficiary Location

Income Determination Method

Beneficiary Income

Summary

American Community Survey - Input

Beneficiary Member ID: HH1

HH1

HH2

Wages, salary, commissions, bonuses, or tips from all jobs. Report amount before deductions for taxes, bonds, dues, or other items.

\$

Self-employment income from own nonfarm businesses or farm businesses, including proprietorships and partnerships. Report NET income after business expenses.

\$

Interest, dividends, net rental income, royalty income, or income from estates and trusts. Report even small amounts credited to an account.

\$

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 >

DASHBOARD

ANNUAL INCOME

Type of Assistance

Beneficiary ID

Beneficiary Location

Income Determination Method

► Beneficiary Income

Summary

American Community Survey - Input

Beneficiary Member ID: HH2

HH1

HH2

Wages, salary, commissions, bonuses, or tips from all jobs. Report amount before deductions for taxes, bonds, dues, or other items.

\$ 10,000.00

Self-employment income from own nonfarm businesses or farm businesses, including proprietorships and partnerships. Report NET income after business expenses.

\$

Interest, dividends, net rental income, royalty income, or income from estates and trusts. Report even small amounts credited to an account.

\$

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 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 >

Summary: Option to Download PDF

CDBG Annual Income Calculation

Beneficiary ID: 100312

DASHBOARD

ANNUAL INCOME

Type of Assistance

Beneficiary ID

Beneficiary Location

Income Determination Method

Beneficiary Income

Summary

American Community Survey - Summary

Download PDF file

Beneficiary ID: 100312

Area, State: Fort Wayne, IN MSA, Indiana

Number of Members: 2

Income Limit: \$40,850.00

Member IDs:	HH1	HH2	Subtotals of 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	\$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.

< 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

AMERICAN COMMUNITY SURVEY ANNUAL INCOME CALCULATION

Completed on 10/08/2012

Last Name:	Beneficiary ID:	100312
Area/State: Fort Wayne, IN MSA, Indiana	2012 Income Limit:	Number of Members: 2
	\$40,850.00	

First Names:					Subtotals of Line Items
Member IDs:	HH1	HH2			
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 100312 has been determined to be below the income limit for this area.

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

NSP Income Calculation – Annual Income

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

CPD Income Eligibility Calculator

[Change Password](#)

NSP Annual Income Calculation

Beneficiary ID: 1003122

DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination Method

Beneficiary Income

Summary

The CPD Income Eligibility Calculator asks for a "Beneficiary ID" instead of a "Last Name" to help protect the privacy of applicants to CPD programs. The Beneficiary ID you enter should be unique, will be included on the Calculator screens and printouts, and will be the key data element necessary to later find, complete, and/or edit 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.**

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 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 of the associated individual, family, or household can be written or otherwise inserted.

Beneficiary ID: 1003122

Number of household members: 4

Note: If you need to change the number of household members, or change the Beneficiary ID, you will need to either delete this calculation or create a new calculation, on the Dashboard, with a different Beneficiary ID.

< Previous

Continue >

Beneficiary ID – Screen 2: HH Member Info

NSP Annual Income Calculation

Beneficiary ID: 1003122

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	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
This member is a child age 18 or UNDER	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
This member is a fulltime student OVER the age of 18 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This member is 62 years of age or older	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This member is a person (of any age) with disabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This member is the head of household	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This member is the co-head of household	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

< Previous

Continue >

Beneficiary Location

NSP Annual Income Calculation		Beneficiary ID: 1003122	Print
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DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination Method

Beneficiary Income

Summary

Please select the location and income limit information applicable to this household:

State
Illinois

Area
Chicago-Joliet-Naperville, IL HUD Metro FMR Area

Applicable 2012 Income Limit for household size in area
120%

The **2012 120% Income Limit** for a **4-member** household in **Chicago-Joliet-Naperville, IL HUD Metro FMR Area** (CBSA: METRO16980M16980) is **\$90,950**. (Completed on October 8, 2012.)

Please [print](#) this page for your files.

< Previous

Continue >

Income Determination Method

NSP Annual Income Calculation		Beneficiary ID: 1003122
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DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination Method

What type of NSP assistance is being provided to this beneficiary?

☒ Homebuyer

☐ Rental

☐ Demolition

☐ Public Facility (NSP 1)

< Previous

Continue >

Beneficiary Income – Screen 1: Income Definition

NSP Annual Income Calculation		Beneficiary ID: 1003122
<div><div>DASHBOARD</div><div>ANNUAL INCOME</div><div>Beneficiary ID</div><div>Beneficiary Location</div><div>Income Determination Method</div><div>► Beneficiary Income</div></div>	<p>You may choose one of the following definitions of income to use when calculating "annual income" for the 1003122 household:</p> <ul style="list-style-type: none"><input type="radio"/> 24 CFR Part 5 Annual Income<input checked="" type="radio"/> IRS Form 1040 Adjusted Gross Income<input type="radio"/> American Community Survey (ACS) <div><div>< Previous</div><div>Continue ></div></div>	

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

NSP Annual Income Calculation

Beneficiary ID: 1003122

DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination Method

► Beneficiary Income

Summary

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 [irs.gov](https://www.irs.gov) 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: HH1

HH1

HH2

HH3

HH4

Income

Wages, salaries, tips, etc.	\$ 40,000.00
Overtime/Bonus pay	\$
Raises/COLAs	\$
Taxable interest	\$ 20.00
Ordinary dividends	\$
Taxable refunds, credits, or offsets of state and local income taxes	\$
Alimony received	\$
Business income or (loss)	\$
Capital gain or (loss)	\$
Other gains or (losses)	\$
Taxable amount of IRA distributions	\$
Taxable amount of Pensions and annuities	\$
Rentals real estate, royalties, partnerships, S corporations, trusts, etc.	\$

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

[< Previous](#)
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DASHBOARD

ANNUAL INCOME

Beneficiary ID

Beneficiary Location

Income Determination
Method

► Beneficiary Income

Summary

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 [irs.gov](https://www.irs.gov) 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

Income

Wages, salaries, tips, etc.	\$ 20,000.00
Overtime/Bonus pay	\$
Raises/COLAs	\$
Taxable interest	\$
Ordinary dividends	\$
Taxable refunds, credits, or offsets of state and local income taxes	\$
Alimony received	\$
Business income or (loss)	\$
Capital gain or (loss)	\$
Other gains or (losses)	\$
Taxable amount of IRA distributions	\$
Taxable amount of Pensions and annuities	\$
Rentals real estate, royalties, partnerships, S corporations, trusts, etc.	\$

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

< Previous

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Summary: Option to Download PDF

NOTE: Use scroll bar at bottom to see all columns

NSP Annual Income Calculation
Beneficiary ID: 1003122

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

IRS 1040 Adjusted Gross Income - Summary

Download PDF file

Beneficiary ID: 1003122
Area, State: Chicago-Joliet-Naperville, IL HUD Metro FMR Area, Illinois
Number of Members: 4
Income Limit: \$90,950.00

Member IDs:	HH1	HH2	HH3	HH4	Subtotals of Line Items
Wages, salaries, tips, etc.	\$40,000.00	\$20,000.00	\$0.00	\$0.00	\$60,000.00
Overtime/Bonus pay	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Raises/COLAs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
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
Rentals 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 (if any)	\$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 (if any)	\$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 1003122 has been determined to be below the income limit for the area.

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< Previous

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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	2012 Income Limit: \$90,950.00
	Number of Members: 4

First Names:					Subtotals of Line Items
Member IDs:	HH1	HH2	HH3	HH4	
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 1003122 has been determined to be below the income limit for this area.

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		
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

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

PREPARER		
Signature	Printed Name	Date