**Worksheet for Computing Total Tenant Payment—Section 8 Program**

**U.S. Department of Housing and Urban Development**
**Office of Housing**
**Federal Housing Commissioner**

**IMPORTANT:** Read Appendix 2 of Handbook 4350.3 before you complete this Form. The Appendix tells you which version of the Worksheet you must use.

<table>
<thead>
<tr>
<th>Name of Tenant</th>
<th>Name of Project</th>
<th>Unit Number</th>
</tr>
</thead>
</table>

**Part A - COMPUTE THE TOTAL TENANT PAYMENT THAT WOULD BE REQUIRED WITHOUT THE PROTECTION OF THE 10% CAPS**

A-1. _____ Monthly Income (Item 31 ÷ 12).

A-2. _____ Monthly Adjusted Income (Item 43 ÷ 12).

A-3. _____ HCDA Percentage (Item 48).


A-5. _____ 10% of Monthly Income (Line A1 × .10).

A-6. _____ Welfare Rent (Applies only to welfare recipients in as-paid States or Counties).

A-7. _____ TOTAL TENANT PAYMENT (TTP).

Enter the largest of Lines A4, A5, or A6.

**READ ALL OF THE FOLLOWING STATEMENTS. CHECK EACH STATEMENT THAT IS TRUE.**

- [ ] Tenant moved in on or after July 1, 1984 AND received Section 8 assistance at the time of move in.
- [ ] The Tenant’s last ANNUAL recertification used a 10/84 version of the HUD-50059a/cid AND the Family was NOT affected by the rent increase limitations. (Item 55 of the last 10/84 HUD-50059 was checked “NO.”)

**IF YOU:**

- [ ] left ALL of the above boxes blank, GO TO PART B.
- [ ] checked one or more boxes, STOP WORK and:
  1. Transfer Line A7 to Item 50 of the HUD-50059; and
  2. Enter “NO” in Item 55 of the HUD-50059.

**Part B - COMPUTE WHAT THE TENANT’S ANNUAL AND ADJUSTED INCOME WOULD HAVE BEEN UNDER THE PRE-1984 DEFINITIONS OF INCOME AND ALLOWANCES**

**ANNUAL INCOME**

B-1. $ _____ ANNUAL INCOME Based Upon 1984 Rules (Item 31 of the HUD-50059).

B-2. CHECK each situation that applies to this Family’s current circumstances. For each box you check, enter the amount requested. (Obtain from verification forms.)

   a. [ ] $ _____ The Family has assets in excess of $5,000 AND imputed income from assets (Item 27 of the HUD-50059) is greater than actual income from assets (Item 26d of the HUD-50059). Enter the difference (Item 27 minus total in Item 26d).

   b. [ ] $ _____ The Family receives employment income from a full-time student who is: 1) 18 years of age or older; and 2) NOT the head or spouse. Enter the full-time student’s employment income.

   c. [ ] $ _____ Excess tax credit NOT previously counted. (Complete ONLY if management previously did NOT consider excess credits.)


B-4. $ _____ ANNUAL INCOME BASED Upon Pre-1984 Rules (Line R1 minus Line B3).

B-5. $ _____ MONTHLY INCOME Based Upon Pre-1984 Rules (Line B4 divided by 12).

**B-6. CHECK any situation that applies to this Family’s current circumstances.**

   a. [ ] The Household expects to incur medical expenses AND NEITHER the Head or Spouse will be 62 or older, handicapped or disabled on the date this HUD-50059 is effective. NOTE: These expenses were NOT included in the HUD-50059. (Obtain from verification forms you just completed.)

   b. [ ] Item 39a of the HUD-50059 shows the family anticipates expenses for handicap apparatus or care.

**CHECK any statement that is true.**

- [ ] All boxes in B2 and B6 are blank.
- [ ] The last Worksheet prepared for this Tenant was a 7/82 or later version of the HUD-50059a/cid AND the Family was NOT affected by the rent increase limitations.

* IF YOU checked BOTH of the above boxes, STOP WORK and follow the STOP WORK instructions in Part A.

* OTHERWISE, GO TO B-7.
ADJUSTED INCOME

B-7. $ _______ ALLOWABLE MEDICAL EXPENSES. Enter the answer from Line B7c.

a. $ _______ Total Medical Expense (Obtain from the verification forms you just completed).

b. $ _______ 3% of Total Annual Income (03 x B4).

c. $ _______ Line a minus Line b. If Line a is less than or equal to Line b, enter zero.

CHECK any statement that is true:

☐ All three boxes in Line B2 are blank.
☐ Line B6b is blank.
☐ Line B7 is zero.
☐ The last Worksheet prepared for this Tenant was a 7/82 or later version of the HUD-50059/aclid AND the Family was NOT affected by the rent increase limitations.

• IF YOU checked ALL of the above boxes, STOP WORK and follow the STOP WORK instructions in Part A.
• OTHERWISE, GO TO B-8.

B-8. $ _______ UNUSUAL EXPENSES.

a. $ _______ CHILD CARE. NOTE: Enter the portion of Item 37 that enables a Family Member to work (as opposed to going to school).

b. $ _______ CARE OF HANDICAPPED/DISABLED. Include the amount of the expenses described in B6b. (Obtain from Item 39a of HUD-50059.)

c. Add Lines B8a and B8b and enter the answer on Line B9.

B-9. $ _______ ALLOWANCE FOR MINORS Using the Pre-1984 Definition of Minor.

a. _______ NUMBER OF MINORS. Enter the number of household members who are age 17 or younger or full-time students. DO NOT COUNT HEAD, SPOUSE OR FOSTER CHILDREN.

b. Multiply Line B9a by $300 AND enter the answer on Line B9.

B-10. $ _______ TOTAL ALLOWANCES Based Upon Pre-1984 Rules (Total of Lines B7 + B8 + B9).


B-12. $ _______ MONTHLY ADJUSTED INCOME Based Upon Pre-1984 Rules (Line B11 divided by 12).

*******************************************************************************
CHECK ANY STATEMENT THAT IS TRUE.
*******************************************************************************

☐ The last Worksheet prepared for this Tenant was a 7/82 or later version of the HUD-50059/aclid AND the Family was NOT affected by the rent increase limitations. (The answer on the last HUD-50059 was "NO".)

☐ Adjusted Income Based Upon 1984 Rules is less than Adjusted Income Based Upon Pre-1984 Rules. (Line A2 is less than Line B12.)

IF YOU: • left one or both of the above boxes blank, GO TO PART C.

• checked BOTH of the above boxes, STOP WORK AND:
  1) Transfer Line A7 to Item 50 of the HUD-50058; and
  2) Enter "NO" in Item 55 of the HUD-50058.
APPENDIX 4 - 4350.5

Part C - COMPUTE LIMITATIONS ON INCREASES IN TOTAL TENANT PAYMENT

C-1. $_______ TTP UNDER MOST RECENT METHOD. Read only until you find a statement (a,b,c,d) that applies to this Tenant. Check the box next to that statement and follow the instructions for that box. CHECK ONLY ONE BOX.

a. ☐ The Family is NOW being converted from Rent Supplement or RAP to Section 8 and a 7/82 or later version of the Form HUD-50059 a/b/c/d worksheet has never been used to calculate the Tenant’s rent.
   1. Compute the following three amounts:
      _____ × .25 = $_______
      B12
      _____ × .10 = $_______
      B5
      Welfare Rent (Line A8) = $_______
   2. Pick the greatest of the three amounts above and transfer that amount to Line C1.

b. ☐ The last worksheet completed for this Tenant was one of the Forms listed below.
   1. Enter the % charged in Part C of the Tenant’s last Worksheet. Complete only one line.

   If the Last Worksheet was a:
   HUD-50059a/c dated 5/83
   ________% charged: C6 A3
   HUD-50059d dated 5/83
   ________% charged: C4 A3
   HUD-50059a/c/d dated 10/84
   ________% charged: C5 N.A.

   2. Multiply B12 of THIS Worksheet by the percentage above AND transfer the answer to Line C1.
      $_______ × _________% above = $_______
      B12 of THIS Wkst.
      C1

c. ☐ The last Worksheet completed for this Tenant was a 7/82 version of the HUD-50059a. Complete Steps 1 and 2 AND transfer the answer to Line C1.
   1. $_______ + $_______ = _________
      (F1 of LAST Worksheet) (A2 of LAST Worksheet) % of Adj. Income
      (Note: If F1 is blank, use Line B4 of the LAST Worksheet.)

   2. $_______ × % above = $_______
      (B12 of THIS Worksheet) C1

d. ☐ This will be the first time the 1981 HCDA formulas have been applied to this Tenant. (This Tenant’s rent has never been calculated using a 7/82 or later version of the HUD-50059 a/b/c/d) Complete Part D of this Form. (It is Appendix 38 of 4350.3.)

*.ENTER THE ANSWER IN C1 AND GO ON TO C2.*
Worksheet for Computing Tenant Rent—Section 236 Program

**IMPORTANT:** Read Appendix 2 of Handbook 4350.3 before you complete this Form. The Appendix tells you which version of the Worksheet you must use.

<table>
<thead>
<tr>
<th>Name of Tenant</th>
<th>Name of Project</th>
<th>Unit Number</th>
</tr>
</thead>
</table>

**Part A - COMPUTE THE TENANT RENT THAT WOULD BE REQUIRED WITHOUT THE PROTECTION OF THE 10% CAPS**

Complete only one column. Select the utility arrangement that applies to this Tenant.

<table>
<thead>
<tr>
<th>No Utility Allowance</th>
<th>With Utility Allowance</th>
</tr>
</thead>
<tbody>
<tr>
<td>A-7. TENANT RENT (Enter the larger of A4 or A5 but never more than A6).</td>
<td>A-7. * Basic Rent (Item 44).</td>
</tr>
<tr>
<td></td>
<td>A-10. * Market Rent (From Rent Schedule).</td>
</tr>
<tr>
<td></td>
<td>A-11. TENANT RENT (Enter the larger of A8 or A9 but never more than A10).</td>
</tr>
</tbody>
</table>

*Note: Use the Rents and Utility Allowance that will be in effect on the date this Tenant Rent will become effective.*

**READ ALL OF THE FOLLOWING STATEMENTS. CHECK EACH STATEMENT THAT IS TRUE.**

- Tenant moved in on or after 10/1/84.
- The Tenant Rent in Part A is the Basic Rent.
- The Tenant's last annual recertification used a 10/84 version of the HUD-50059/10/84 AND the Family was NOT affected by the rent increase limitations. (Item 55 of the last 10/84 HUD-50059 was checked "NO.")

IF YOU: * left ALL of the above boxes blank, GO TO PART B.
  * checked one or more boxes, STOP WORK and:
    1) Transfer the Tenant Rent from Part A to Item 51 of the HUD-50059; and
    2) Enter "NO" in Item 55 of the HUD-50059.
### Part B - Compute What the Tenant's Annual and Adjusted Income Would Have Been Under the Pre-1984 Definitions of Income and Allowances

#### Annual Income

**B-1.** $____________ Annual Income Based Upon 1984 Rules (item 31 of the HUD-50059).

**B-2.** CHECK each situation that applies to this Family's current circumstances. For each box you check, enter the amount requested (obtain from verification forms).

- a. $____________ The Family has assets in excess of $5,000 AND imputed income from assets (item 27 of the HUD-50059) is greater than actual income from assets (item 26d of the HUD-50059). Enter the difference (item 27 minus total in item 26d).

- b. $____________ The Family receives employment income from a full-time student who is: 1) 18 years of age or older; and 2) NOT the head or spouse. Enter the full-time student's employment income.

- c. $____________ Excess tax credit NOT previously counted. (Complete only if management previously did NOT consider excess credits.)

**B-3.** $____________ Increase in Annual Income caused by 1984 Changes (Add B2a through B2c).

**B-4.** $____________ Annual Income Based Upon Pre-1984 Rules (Line B1 minus Line B3).

**B-5.** $____________ Monthly Income Based Upon Pre-1984 Rules (Line B4 divided by 12).

**B-6.** CHECK any situation that applies to this Family's current circumstances.

- a. The Household expects to incur medical expenses AND NEITHER the Head or Spouse will be 62 or older, handicapped or disabled on the date this HUD-50059 is effective. NOTE: These expenses were NOT included on the HUD-50059 (obtain from verification forms you just completed).

- b. Item 39a of the HUD-50059 shows the family anticipates expenses for handicap apparatus or care.

**Adjusted Income**

**B-7.** $____________ Allowable Medical Expenses. Enter the answer from Line B7a.

- a. $____________ Total Medical Expense (obtain from the verification forms you just completed).

- b. $____________ 3% of Total Annual Income (0.03 x B4).

- c. $____________ Line a minus Line b. If Line a is less than equal to Line b, enter zero.

**UNUSUAL EXPENSES.**

- a. $____________ Child Care. Note: Enter the portion of item 37 that enables a Family Member to work (as opposed to going to school).

- b. $____________ Care of Handicapped/Disabled. Include the amount of the expenses described in B6b. (Obtain from item 39a on HUD-50059.)

- c. Add Lines B6a and B6b and enter the answer on Line B9a.

**B-9.** $____________ Allowance for Minors Using the Pre-1984 Definition of Minors.

- a. Number of Minors. Enter the number of household members who are age 17 or younger or full-time students. DO NOT COUNT HEAD, SPouse or Foster Children.

- b. Multiply Line B9a by $300 AND enter the answer on Line B9b.

**B-10.** $____________ Total Allowances Based Upon Pre-1984 Rules (total of Lines B7 + B8 + B9).

**B-11.** $____________ Adjusted Income Based Upon Pre-1984 Rules (Line B4 minus Line B10).

**B-12.** $____________ Monthly Adjusted Income Based Upon Pre-1984 Rules (Line B11 divided by 12).

---

*IF YOU checked ALL of the above boxes, STOP WORK and follow the STOP WORK instructions in Part A.*

*OTHERWISE, GO TO B-7.*
### Part C - Compute Limitations on Increases in Tenant Rent

#### C-1. $______

**Tenant Rent Under Most Recent Method.** Read only until you find a statement (a.b.c) that applies to this tenant. Check the box next to that statement and follow the instructions for that box. Check only one box.

- a. The last worksheet completed for this Tenant was one of the forms listed below. Enter the % charged in Part C of the Tenant’s last worksheet. Complete only one line.
  - If the last worksheet was:
    - HUD-50059a/c dated 5/83: % C6 A3
    - HUD-50059b dated 5/83: % C5 A3
    - HUD-50059d dated 5/83: % C4 A3
    - HUD-50059a/b/c/d dated 10/84: % C5 N.A.
  - 1. Multiply B12 of THIS Worksheet by the percentage above and transfer the answer to Line C1.

\[
\text{Transfer: } \text{B12 of THIS Wst. } \times \% \text{ above } = \text{C1}
\]

- b. This will be the first time the 1981 HCDA formulas have been applied to this Tenant. The Tenant’s rent has never been adjusted using a 1982 or later version of the HUD-50059a/b/c/d. Complete Part D of this Worksheet and transfer the answer to Line C1.

- c. The last worksheet completed for this Tenant was a 1982 version of the HUD-50059a. Complete Steps 1 and 2 AND transfer the answer to Line C1.

1. $______ + $______ = $______

   \[
   (\text{F1 of LAST Worksheet}) + (\% \text{ of Adj. Income}) = \text{C1}
   \]

2. $______ \times (\% \text{ above }) = $______

   \[
   (\text{B12 of THIS Worksheet}) \times \% \text{ above } = \text{C1}
   \]

**Additional Instructions:**
- Transfer: $______
- Item: C3
- 51
- C4
- 55

### Additional Notes

- **STOP WORK ON THIS FORM.**

---

**HURRA Limitations:**
- a. Annual Recertification. Enter the lesser of C2 or Tenant Rent in Part A but NEVER less than Basic Rent.
- b. Interim Recertification or Gross Rent Change. Enter the lesser of C1 or Tenant Rent in Part A but NEVER less than Basic Rent.

- **C4.** Percentage of Adjusted Income Charged. (C3 divided by B12). Round to two decimal places (e.g., 00.00%).

---

**HURRA Limitations (Continued):**
- If C3 = A1 or A11, check NO and go TO Line C5.
- In all other cases, check YES and go TO Line C5.

---

**HURRA Limitations (Continued):**
- If C3 + 10% of Line C1 (Line C1 x 1.10), then YES.

---

**HURRA Limitations (Continued):**
- In all other cases, check YES and go TO Line C5.

---

**HURRA Limitations (Continued):**
- If C3 = A1 or A11, check NO and go TO Line C5.
- In all other cases, check YES and go TO Line C5.

---

**HURRA Limitations (Continued):**
- If C3 + 10% of Line C1 (Line C1 x 1.10), then YES.

---

**HURRA Limitations (Continued):**
- In all other cases, check YES and go TO Line C5.

---

**HURRA Limitations (Continued):**
- If C3 = A1 or A11, check NO and go TO Line C5.
- In all other cases, check YES and go TO Line C5.
Part D - DETERMINE WHAT THE TOTAL TENANT RENT WOULD HAVE BEEN UNDER PRE-1981 SECTION 236 FORMULA

Complete only one column. Select the utility arrangement that applies to this Tenant.

<table>
<thead>
<tr>
<th>No Utility Allowance</th>
<th>With Utility Allowance</th>
</tr>
</thead>
<tbody>
<tr>
<td>D-1.</td>
<td>25% of Line B12. (25 \times B12 of THIS Worksheet).</td>
</tr>
<tr>
<td>D-2.</td>
<td>*Basic Rent (Item 44 of HUD-50059 you are now preparing).</td>
</tr>
<tr>
<td>D-3.</td>
<td>*Market Rent. (From Rent Schedule).</td>
</tr>
<tr>
<td>D-4.</td>
<td>TENANT RENT. (Enter the larger of D1 or D2 but never more than D3).</td>
</tr>
<tr>
<td></td>
<td>25% of Line B12. (25 \times B12 of THIS Worksheet).</td>
</tr>
<tr>
<td></td>
<td>*Utility Allowance (Item 45 of HUD-50059 you are now preparing).</td>
</tr>
<tr>
<td></td>
<td>D1 minus D2.</td>
</tr>
<tr>
<td></td>
<td>*Basic Rent. (Item 44 of HUD-50059 you are now preparing).</td>
</tr>
<tr>
<td></td>
<td>Higher of D3 or D4.</td>
</tr>
<tr>
<td></td>
<td>Minimum Rent (20% \times B12).</td>
</tr>
<tr>
<td></td>
<td>*Market Rent. (From Rent Schedule).</td>
</tr>
<tr>
<td></td>
<td>TENANT RENT. (Enter the larger of D5 or D7 but never more than D7).</td>
</tr>
</tbody>
</table>

ENTER THE ANSWER ON LINE C1 AND GO TO LINE C2.

*NOTE: Use the Rents and Utility Allowance that will be in effect on the date this Tenant Rent will become effective.
Worksheet for Computing Total Tenant Payment—
Rental Assistance Payments (RAP)

U.S. Department of Housing and Urban Development
Office of Housing
Federal Housing Commissioner

IMPORTANT: Read Appendix 9 of Handbook 4350.3 before you complete this Form. The Appendix tells you which version of the Worksheet you must use.

<table>
<thead>
<tr>
<th>Name of Tenant</th>
<th>Name of Project</th>
<th>Unit Number</th>
</tr>
</thead>
</table>

Part A – COMPUTE THE TOTAL TENANT PAYMENTS THAT WOULD BE REQUIRED WITHOUT THE PROTECTION OF THE 10% CAPS

A-3. HCDA Percentage (Item 48).
A-5. 10% of Monthly Income (Line A1 x .10).
A-6. Welfare Rent (Applies only to welfare recipients in nonpaid States or Counties).
A-7. TOTAL TENANT PAYMENT (TTP).

Enter the largest of Lines A4, A5, or A6.

*******************************************************************************
READ ALL OF THE FOLLOWING STATEMENTS. CHECK EACH STATEMENT THAT IS TRUE.
*******************************************************************************

☐ Tenant moved in on or after 10/1/84.
☐ Tenant does NOT now receive Section 8, Rent Supplement or RAP assistance.
☐ The Tenant’s last ANNUAL recertification used a 10/84 version of the HUD-50059 and the Family was NOT affected by the rent increase limitations. (Item 98 of the last 10/84 HUD-50059 was checked “NO.”)
☐ Line A7 = Line A6.

IF YOU: * Left ALL of the above boxes blank, GO TO PART B.
* checked one or more boxes, STOP WORK and:
1) Transfer Line A7 to Item 50 of the HUD-50059; and
2) Enter “NO” in Item 55 of the HUD-50059.
**ANNUAL INCOME**

B-1. $ _____ ANNUAL INCOME Based Upon 1984 Rules (Item 31 of the HUD-50059.)

B-2. CHECK each situation that applies to this Family’s current circumstances. For each box you check, enter the amount requested. (Obtain from verification forms.)

a. ☐ $ _____ The Family has assets in excess of $5,000 AND imputed income from assets (Item 27 of the HUD-50059) is greater than actual income from assets (Item 26d of the HUD-50059). Enter the difference (Item 27 minus total in Item 26d).

b. ☐ $ _____ The Family receives employment income from a full-time student who is: 1) 18 years of age or older; and 2) NOT the head or spouse. Enter the full-time student’s employment income.

c. ☐ $ _____ Excess tax credit NOT previously counted. (Complete ONLY if management previously did NOT consider excess credits.)


B-4. $ _____ ANNUAL INCOME BASED Upon Pre-1984 Rules (Line B1 minus Line B3).

B-5. $ _____ MONTHLY INCOME Based Upon Pre-1984 Rules (Line B4 divided by 12).

B-6. CHECK any situation that applies to this Family’s current circumstances.

a. ☐ The Household expects to incur medical expenses AND NEITHER the Head or Spouse will be 62 or older, handicapped or disabled on the date this HUD-50059 is effective. NOTE: These expenses were NOT included on the HUD-50059. (Obtain from verification forms you just completed.)

b. ☐ Item 30a of the HUD-50059 shows the family anticipates expenses for handicap apparatus or care.

CHECK any statement that is true.

☐ All boxes in B2 and B6 are blank.

☐ The last Worksheet prepared for this Tenant was a 7/82 or later version of the HUD-50059c/id AND the Family was NOT affected by the rent increase limitations.

* IF YOU checked BOTH of the above boxes, STOP WORK and follow the STOP WORK instructions in Part A.
* OTHERWISE, GO TO B-7.

**ADJUSTED INCOME**

B-7. $ _____ ALLOWABLE MEDICAL EXPENSES. Enter 1 answer from Line B7c.

a. $ _____ Total Medical Expense (Obtain from the verification forms you just completed).

b. $ _____ 3% of Total Annual Income (0.03 x B4).

c. $ _____ Line a minus Line b. If Line a is less than or equal to Line b, enter zero.

CHECK any statement that is true.

☐ All three boxes in Line B2 are blank.

☐ Line B6b is blank.

☐ Line B7 is zero.

☐ The last Worksheet prepared for this Tenant was a 7/82 or later version of the HUD-50059c/id AND the Family was NOT affected by the rent increase limitations.

* IF YOU checked ALL of the above boxes, STOP WORK and follow the STOP WORK instructions in Part A.
* OTHERWISE, GO TO B-8.

B-8. $ _____ UNUSUAL EXPENSES.

a. $ _____ CHILD CARE. NOTE: Enter the portion of Item 37 that enables a Family Member to work (as opposed to going to school).

b. $ _____ CARE OF HANDICAPPED/DISABLED. Include the amount of the expenses described in B6c. (Obtain from Item 39a of HUD-50059.)

c. Add Lines B8a and B8b and enter the answer on Line B8.

B-9. $ _____ ALLOWANCE FOR MINORS Using the Pre-1984 Definition of Minors.

a. NUMBER OF MINORS. Enter the number household members who are age 17 or younger or full-time students. DO NOT COUNT HEAD, SPOUSE OR FOSTER CHILDREN.

b. Multiply Line B9a by $300 AND enter the answer on Line B9.

B-10. $ _____ TOTAL ALLOWANCES Based Upon Pre-1984 Rules (Total of Lines B7 + B8 + B9).


B-12. $ _____ MONTHLY ADJUSTED INCOME Based Upon Pre-1984 Rules (Line B11 divided by 12).
The last Worksheet prepared for this Tenant was a 7/82 or later version of the HUD-50059a/c/d AND the Family was NOT affected by the rent increase limitations. (The answer on the last HUD-50059 was "NO").

IF YOU: • left one or both of the above boxes blank, GO TO PART C.
• checked BOTH of the above boxes, STOP WORK AND:
  1) Transfer Line A7 to Item 60 of the HUD-50059; and
  2) Enter "NO" in Item 55 of the HUD-50059.

Part C - COMPUTE LIMITATIONS ON INCREASES IN TOTAL TENANT PAYMENT

C-1. $________ TTP UNDER MOST RECENT METHOD. Read only until you find a statement (a,b,c) that applies to this tenant. Check the box next to that statement and follow the instructions for that box. CHECK ONLY ONE BOX.

<table>
<thead>
<tr>
<th>Last Worksheet</th>
<th>Enter % of Adj. Income Charged:</th>
<th>From LAST Worksheet</th>
<th>If Blank, Use Line:</th>
</tr>
</thead>
<tbody>
<tr>
<td>HUD-50059a/c</td>
<td></td>
<td>C6 A3</td>
<td></td>
</tr>
<tr>
<td>dated 5/83</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HUD-50059d</td>
<td></td>
<td>C4 A3</td>
<td></td>
</tr>
<tr>
<td>dated 5/83</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HUD-50059a/c/d</td>
<td></td>
<td>C5 N.A.</td>
<td></td>
</tr>
<tr>
<td>dated 10/84</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Multiply B12 of THIS Worksheet by the percentage above AND transfer the answer to Line C1.

\[ \text{C1} = \frac{\text{B12}}{} \times \frac{\%}{\text{above}} \times \frac{\text{Line C1}}{\text{THIS Worksheet}} \]

b. This will be the first time the 1981 HCDA formulas have been applied to this Tenant. (This Tenant’s rent has never been calculated using a 7/82 or later version of the HUD-50059 a/c/d.) Complete Part D of this Worksheet AND transfer the answer to Line C1.

c. The last Worksheet completed for this Tenant was a 7/82 version of the HUD-50059a. Complete Steps 1 and 2 AND transfer the answer to Line C1.

1. \[ (\text{F1 of LAST Worksheet}) + (\text{A2 of LAST Worksheet}) = \% \text{ of Adj. Income} \]

(Note: If F1 is blank, use Line B4 of the LAST Worksheet)

2. \[ \text{C1} = \frac{(\text{B12 of THIS Worksheet})}{(\% \text{ above})} \]

ENTER THE ANSWER IN C1 AND GO ON TO C2.

C-2. $________ 110% of Line C1 (Line C1 = 1.10).

C-3. $________ TTP FOR UPCOMING YEAR. Check the type of recertification you are preparing and follow the instructions for that type of recertification.

\[ \text{C3} = \text{Line C1} \times \frac{\%}{\text{above}} \]

a. • Annual. Enter the lesser of A7 or C2.

b. • Interim. Enter the lesser of A7 or C1.

C-4. Was the Family affected by the HURRA Limitations?

\[ \begin{align*}
\text{If C3 = A7, check \text{NO AND GO TO Line C6.}} & \quad \square \text{NO} \\
\text{In all other cases, check \text{YES AND GO TO Line C6.}} & \quad \square \text{YES}
\end{align*} \]

C-5. ________ Percentage of Adjusted Income Charged. (C3 divided by B12). Round to two decimal places (e.g., 00.00%).

C-6. Transfer the answers on Lines C3 and C4 of this Worksheet to the HUD-50059 as directed below:

<table>
<thead>
<tr>
<th>Transfer:</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>C3</td>
<td>50</td>
</tr>
<tr>
<td>C4</td>
<td>95</td>
</tr>
</tbody>
</table>

STOP WORK ON THIS FORM.
**Part D - DETERMINE WHAT THE TOTAL TENANT RENT WOULD HAVE BEEN UNDER PRE-1981 SECTION 236 FORMULA**

Complete only one column. Select the utility arrangement that applies to this Tenant.

**No Utility Allowance**

| D-1 | 25% of Line B12. (25 x B12 of THIS Worksheet). |
| D-2 | Basic Rent (Item 44 of HUD-50059 you are now preparing). |
| D-3 | Market Rent. (From Rent Schedule). |
| D-4 | TENANT RENT. (Enter the larger of D1 or D2 but never more than D3). |

**With Utility Allowance**

| D-1 | 25% of Line B12. (25 x B12 of THIS Worksheet). |
| D-2 | Utility Allowance (Item 45 of HUD-50059 you are now preparing). |
| D-3 | D1 minus D2. |
| D-4 | Basic Rent. (Item 44 of HUD-50059 you are now preparing). |
| D-5 | Higher of D3 or D4. |
| D-6 | Minimum Rent (20% x B12). |
| D-7 | Market Rent. (From Rent Schedule). |
| D-8 | TENANT RENT. (Enter the larger of D5 or C but never more than D7). |

**ENTER THE ANSWER ON LINE C1 AND GO TO LINE C2.**

- NOTE: Use the Rents and Utility Allowance that will be in effect on the date this Tenant Rent will become effective.
Worksheet for Computing Total Tenant Payment—Rent Supplement Program

U.S. Department of Housing and Urban Development
Office of Housing
Federal Housing Commissioner

IMPORTANT: Read Appendix 2 of Handbook 4350.3 before you complete this Form. The Appendix tells you which version of the Worksheet you must use.

<table>
<thead>
<tr>
<th>Name of Tenant</th>
<th>Name of Project</th>
<th>Unit Number</th>
</tr>
</thead>
</table>

**Part A - Compute the Total Tenant Payment that Would Be Required Without the Protection of the 10% Caps**

A-1. __________ Monthly Income.

A-2. __________ Monthly Adjusted Income (Item 43 + 12).

A-3. __________ HCDA Percentage (Item 48).

A-4. __________ Gross Rent (Item 45).

A-5. __________ 30% of Gross Rent (Line A4 x .30).

A-6. __________ Monthly Adjusted Income x HCDA Percentage (A2 x A3).

A-7. __________ TOTAL TENANT PAYMENT (TTP).

Enter the larger of Lines A5 or A6.

NOTE: If this is a move-in or an initial certification, Tenant is eligible ONLY if Total Tenant Payment (TTP) is less than 90% of Gross Rent - i.e., A7 is less than (.90 x A4).

*****************************************************************************
READ ALL OF THE FOLLOWING STATEMENTS. CHECK EACH STATEMENT THAT IS TRUE.
*****************************************************************************

☐ Tenant moved in on or after October 1, 1984.

☐ The Tenant's last ANNUAL recertification used a 10/84 version of the HUD-50059 and the Family was NOT affected by the rent increase limitations. (Item 55 of the last 10/84 HUD-50059 was checked "NO.")

☐ Tenant does NOT now receive Section 8, Rent Supplement or RAP assistance.

☐ Line A7 equals Line A5.

IF YOU: • left ALL of the above boxes blank, GO TO PART B.
       • checked one or more boxes, STOP WORK and:
         1) Transfer Line A7 to Item 50 of the HUD-50059; and
         2) Enter "NO." in Item 55 of the HUD-50059.
**ANNUAL INCOME**

B-1. **$** ANNUAL INCOME Based Upon 1984 Rules (Item 31 of the HUD-50059.)

B-2. CHECK each situation that applies to this Family's current circumstances. For each box you check, enter the amount requested. (Obtain from verification forms.)

a. **$** The Family has assets in excess of $5,000 (Any imputed income from assets (Item 27 of the HUD-50059) is greater than actual income from assets (Item 26c of the HUD-50059). Enter the difference (Item 27 minus total in Item 26d.)

b. **$** The Family receives employment income from a full-time student who is: 1) 18 years of age or older; and 2) NOT the head or spouse. Enter the full-time student’s employment income.

c. **$** Excess tax credit NOT previously counted. (Complete ONLY if management previously did NOT consider excess credits.)

B-3. **$** Increase in Annual income caused by 1984 Changes (Add B2a through B2c).

B-4. **$** ANNUAL INCOME BASED UPON Pre-1984 Rules (Line B1 minus Line B3).

B-5. **$** MONTHLY INCOME Based Upon Pre-1984 Rules (Line B4 divided by 12).

B-6. CHECK any situation that applies to this Family’s current circumstances.

a. ☐ The Household expects to incur medical expenses AND NEITHER the Head or Spouse will be 62 or older, handicapped or disabled on the date this HUD-50059 is effective. NOTE: These expenses were NOT included on the HUD-50059. (Obtain from verification forms you just completed.)

b. ☐ Item 39a of the HUD-50059 shows the family anticipates expenses for handicap apparatus or care.

CHECK any statement that is true.

☐ Neither the Head or Spouse was 62 or older on 10/1/84.

☐ All boxes in B2 and B6 are blank.

☐ The last Worksheet prepared for this Tenant was 7/82 or later version of the HUD-50059a/cld AND the Family was NOT affected by the rent increase limitations.

* IF YOU checked ALL of the above boxes, STOP WORK and follow the STOP WORK instructions in Part A.

* OTHERWISE, GO TO B-7.

**ADJUSTED INCOME**

B-7. **$** ALLOWABLE MEDICAL EXPENSES. Enter $ answer from Line B7c.

a. **$** Total Medical Expense (Obtain from the verification forms you just completed).

b. **$** 3% of Total Annual Income (0.03 x B4).

c. **$** Line a minus Line b. If Line a is less than or equal to Line b, enter zero.

CHECK any statement that is true.

☐ Neither the Head or Spouse was 62 or older on 10/1/84.

☐ All three boxes in Line B2 are blank.

☐ Line B6b is blank.

☐ Line B7 is zero.

☐ The last Worksheet prepared for this Tenant was 7/82 or later version of the HUD-50059a/cld AND the Family was NOT affected by the rent increase limitations.

* IF YOU checked ALL of the above boxes, STOP WORK and follow the STOP WORK instructions in Part A.

* OTHERWISE, GO TO B-9.

B-8. **$** UNUSUAL EXPENSES.

a. **$** CHILD CARE. NOTE: Enter the portion of Item 37 that enables a Family Member to work (as opposed to going to school).

b. **$** CARE OF HANDICAPPED/DISABLED. Include the amount of the expenses described in B6b. (Obtain from Item 96a on HUD-50058.)

c. Add Lines B6a and B6b and enter the answer on Line B-9.

B-9. **$** ALLOWANCE FOR MINORS Using the Pre-1984 Definition of Minor.

a. **$** NUMBER OF MINORS. Enter the number of household members who are age 17 or younger or full-time students. DO NOT COUNT HEAD, SPOUSE OR FOSTER CHILDREN.

b. Multiply Line B6a by $300 AND enter the answer on Line B-10.

B-10. **$** TOTAL ALLOWANCES Based Upon Pre-1984 Rules (Total of Lines B7 + B8 + B9).


B-12. **$** MONTHLY ADJUSTED INCOME Based Upon Pre-1984 Rules (Line B11 divided by 12).

* IF the Head/Spouse was 62 or older on 10/1/84, GO TO PART D

* OTHERWISE, GO TO PAGE 3.
**APPENDIX 4**

**CHECK ANY STATEMENT THAT IS TRUE.**

- The last Worksheet prepared for this Tenant was a 7/82 or later version of the HUD-50059a/c/d AND the Family was NOT affected by the rent increase limitations. (The answer on the last HUD-50059 was "NO").
- Adjusted Income Based Upon 1984 Rules is less than Adjusted Income Based Upon Pre-1984 Rules (Line A2 is less than Line B12).

**IF YOU:**
- left one or both of the above boxes blank, GO TO PART C.
- checked BOTH of the above boxes, STOP WORK and:
  1. Transfer Line A7 to Item 30 of the HUD-50059, and
  2. Enter "NO" in Item 35 of the HUD-50059.

**Part C - COMPUTE LIMITATIONS ON INCREASES IN TOTAL TENANT PAYMENT**

**C-1. $**

TIP UNDER MOST RECENT METHOD. Read only until you find a statement (a,b,c) that applies to this tenant. Check the box next to that statement and follow the instructions for that box. CHECK ONLY ONE BOX.

a. ☐ The last worksheet completed for this Tenant was one of the Forms listed below.
   1. Enter % charged in Part C of the Tenant's last Worksheet. Complete only one line.

<table>
<thead>
<tr>
<th>Last Worksheet</th>
<th>% Charged</th>
<th>From LAST Worksheet</th>
<th>If Blank, Use Line</th>
<th>Use Line</th>
</tr>
</thead>
<tbody>
<tr>
<td>HUD-50059a/c</td>
<td>%</td>
<td>C6</td>
<td>A3</td>
<td></td>
</tr>
<tr>
<td>dated 5/83</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HUD-50059d</td>
<td>%</td>
<td>C4</td>
<td>A3</td>
<td></td>
</tr>
<tr>
<td>dated 5/83</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HUD-50059a/c/d</td>
<td>%</td>
<td>C5</td>
<td>N.A.</td>
<td></td>
</tr>
<tr>
<td>dated 10/84</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Multiply B12 of THIS Worksheet by the percentage above AND transfer the answer to Line C1.

\[ \text{B12 of THIS Worksheet} \times \% \text{ above} = \text{C1} \]

b. ☐ This will be the first time the 1981 HCDA formulas have been applied to this Tenant. (This Tenant's rent has never been calculated using a 7/82 or later version of the HUD-50059 a/b/c/d.)

1. Line A5 of THIS Worksheet = $_______
2. $_______ \times .25 = $_______
3. Enter the greater of (1) or (2) = $_______

The last Worksheet completed for this Tenant was a 7/82 version of the HUD-50059a, Complete Steps 1 and 2 AND transfer the answer to Line C1.

1. $_______ + $_______ = $_______
   (F1 of LAST Worksheet) \( \cdot \) (A2 of LAST Worksheet) \( \cdot \) % of Adj. Income
   (NOTE: If F1 is blank, use Line B4 of the LAST Worksheet.)

2. $_______ \times \% \text{ above} = $_______
   (B12 of THIS Worksheet)

-----------------------------
ENTER THE ANSWER IN C1 AND GO ON TO C2.

---

**C-2. $**

110% of Line C1. (Line C1 \( \times \) 1.10).

**C-3. $**

TIP FOR UPCOMING YEAR. Check the type of action you are processing and follow the instructions for that type of action.

a. ☐ Annual Recertification. Enter the lesser of A7 or C2 but NEVER less than A5.

b. ☐ Interim Recertification or Gross Rent Change. Enter the lesser of A7 or C1 but NEVER less than A5.

**C-4.** Was the Family affected by the HURRA Limitations?

- ☐ If C3 = A7, check NO AND GO TO Line C4.
  - ☐ NO
  - ☐ In all other cases, check YES AND GO TO Line C5. ☐ YES.

**C-5.** Percentage of Adjusted Income Charged. (C3 divided by B12). Round to two decimal places (e.g., 00.00%).

**C-6.** Transfer the answers on Lines C3 and C4 of this Worksheet to the HUD-50059 as directed below:

<table>
<thead>
<tr>
<th>Transfer</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>C3</td>
<td>50</td>
</tr>
<tr>
<td>C4</td>
<td>55</td>
</tr>
</tbody>
</table>

STOP WORK ON THIS FORM.
APPENDIX 4

Part D - COMPUTE LIMITATIONS ON INCREASES IN TIP FOR TENANTS AGE 62 OR OLDER

COMPLETE THIS PART D ONLY IF THE INSTRUCTIONS AT THE END OF PART B REQUIRED YOU TO DO SO.

D-1. _____ ANNUAL INCOME (Obtain from HUD-50059 or FHA-2501 in force on 10/1/84. Enter the date that form was effective: ______/_____/______).

D-2. _____ ADDITIONAL INCOME Derived From New Household Members and Members who Recently Became Employed.

a. Was anyone, who is listed on the HUD-50059 you are now preparing, NOT listed on the form used for Line D1?
   □ YES □ NO

b. Is there any adult, who is listed on the HUD-50059 you are now preparing, who:
   1. was listed as unemployed on the form used on Line D1;
   2. is NOW working; AND
   3. is not NOW a full-time student?
   □ YES □ NO

IF YOU ANSWERED:
   * "YES" to one or both of D2a and D2b, GO TO PART E.
   * "NO" to both D2a and D2b, enter zero on Line D2 and GO TO D3.

D-3. _____ TOTAL INCOME TO BE CONSIDERED. (D1 + D2).

D-4. _____ ALLOWABLE MEDICAL EXPENSE. (Enter the amount from D4c.)

a. $ _____ Total Medical Expense (Obtain from Line B7a.)

b. $ _____ 3% of Annual Income Under Pre-1984 Rules. (.03 x D3)

c. $ _____ Line D4a minus Line D4b. If Line D4a is less than or equal to Line D4b, enter zero.

D-5. $ _____ ALLOWANCE FOR MINORS. (Obtain from Line B9.)

D-6. $ _____ UNUSUAL EXPENSES. (Obtain from Line B8.)

D-7. $ _____ TOTAL ALLOWANCES. (D4 + D5 + D6.)


Part E - COMPUTE ADDITIONAL INCOME TO BE CONSIDERED FOR TENANTS AFFECTED BY NEW REQUIREMENT FOR ANNUAL RECERTIFICATION

NOTE: COMPLETE THIS PART E ONLY IF THE INSTRUCTIONS AT THE END OF LINE D-2 DIRECTED YOU TO DO SO.

E-1. ADDITIONAL INCOME from New Household Members. Complete This Line ONLY If You Answered "YES" in D2a, On Line a below, enter the name of anyone who:

1. is listed on the HUD-50059 you are now preparing; but
2. was not listed on the form used for Line D1.
   For each member you list, complete one column of the following chart:

   a. FIRST NAME: a. __________________________ a. __________________________  a. __________________________
   b. HOUSEHOLD INCOME ATTRIBUTABLE TO THIS MEMBER:
      (Obtain from the HUD-50059 you are now preparing. Enter this member's portion of Items 26d and 26b through e.)
      b. $ __________ b. $ __________ b. $ __________
   c. How much of the income shown on Line B3 is attributable to this Member?
      c. $ __________ c. $ __________ c. $ __________
   d. ADDITIONAL INCOME from New Household Members (Line E10 minus Line E1c).
      d. $ __________ d. $ __________ d. $ __________
   e. Add all entries on Line E1d and transfer the total to Line E1.

E-2. ADDITIONAL INCOME From Newly Employed Adults. Complete This Line ONLY If you answered "YES" in D2b. In Column a below, enter the name of anyone who: a) is listed on the HUD-50059 you are now preparing; and b) meets the three characteristics listed below:

1. was listed as unemployed on the form used on Line D1;
2. is NOW working; AND
3. is not NOW a full-time student. For each member you list, enter the employment income attributable to that member.

   COLUMN A. NAME
   __________________________
   __________________________
   __________________________

   COLUMN B. ANNUAL EMPLOYMENT INCOME
   __________________________ yr.
   __________________________ yr.
   __________________________ yr.

   (Obtain these amounts from item 2b of the HUD-50059 you are now preparing.)

Total (Add all entries in Col. B.)
Transfer the answer in Col. B to Line E2.

E-3 ADDITIONAL INCOME TO BE CONSIDERED (Line E1 + Line E2).

TRANSFER E3 TO LINE D2 AND GO ON TO D3.
## The Easy Worksheet for Computing Total Tenant Payment/Tenant Rent (All Programs)

**IMPORTANT:** Read Appendix 2 of Handbook 4350.3 before you complete this Form. The Appendix tells you which version of the Worksheet you must use.

### Name of Tenant | Name of Project | Unit Number
--- | --- | ---

### PART A. COMPUTE THE TOTAL TENANT PAYMENT/TENANT RENT

Complete only one Section. Select the Section that applies to the type of subsidy the Tenant will be receiving.

#### Sec. 8/RAP Tenants

<table>
<thead>
<tr>
<th></th>
<th>Rent Supplement Tenants</th>
</tr>
</thead>
<tbody>
<tr>
<td>A-1</td>
<td>Monthly Income</td>
</tr>
<tr>
<td>A-2</td>
<td>Monthly Adjusted Income (Item 43 ÷ 12)</td>
</tr>
<tr>
<td>A-3</td>
<td>HCDA Percentage (Item 48)</td>
</tr>
<tr>
<td>A-4</td>
<td>Monthly Adjusted Income × HCDA Percentage (A2 × A3)</td>
</tr>
<tr>
<td>A-5</td>
<td>10% of Monthly Income (A1 × .10)</td>
</tr>
<tr>
<td>A-6</td>
<td>Welfare Rent (Applies only to welfare recipients in 50 states or Counties)</td>
</tr>
<tr>
<td>A-7</td>
<td>TOTAL TENANT PAYMENT (TTP) (Enter the larger of A4, A5 or A6).</td>
</tr>
</tbody>
</table>

---

### Go to Part B

#### Section 236 Tenants

Complete only one column under this Part. Select the utility arrangement that applies to this Tenant.

<table>
<thead>
<tr>
<th></th>
<th>With Utility Allowance</th>
<th>No Utility Allowance</th>
</tr>
</thead>
<tbody>
<tr>
<td>A-1</td>
<td>Monthly Income.</td>
<td></td>
</tr>
<tr>
<td>A-2</td>
<td>Monthly Adjusted Income (Item 43 ÷ 12).</td>
<td></td>
</tr>
<tr>
<td>A-3</td>
<td>HCDA Percentage (Item 48).</td>
<td></td>
</tr>
<tr>
<td>A-4</td>
<td>Monthly Adjusted Income × HCDA Percentage (A2 × A3).</td>
<td></td>
</tr>
<tr>
<td>A-5</td>
<td>Basic Rent (Item 44).</td>
<td></td>
</tr>
<tr>
<td>A-6</td>
<td>Market Rent (From Rent Schedule).</td>
<td></td>
</tr>
<tr>
<td>A-7</td>
<td>TENANT RENT (Enter the larger of A4 or A5 but never more than A6).</td>
<td></td>
</tr>
</tbody>
</table>

---

**NOTE:** Use the Rents and Utility Allowance that will be in effect on the date this Tenant Rent will become effective.

### PART B. TRANSFER THIS WORKSHEET DATA TO THE HUD-50059

<table>
<thead>
<tr>
<th>Item No.</th>
<th>HUD-50059</th>
</tr>
</thead>
<tbody>
<tr>
<td>51</td>
<td>Enter the Answer from Part A in:</td>
</tr>
<tr>
<td>50</td>
<td>Enter HCDA Percentage from A3 in</td>
</tr>
<tr>
<td>54</td>
<td>Check &quot;No&quot; in</td>
</tr>
<tr>
<td>55</td>
<td></td>
</tr>
</tbody>
</table>

Prepared By (Name and Date) | Supervisory Review By (Initials and Date)
--- | ---

HUD-50059 e (10-84) | 3/92
--- | ---

U.S. Department of Housing and Urban Development
Office of Housing
Federal Housing Commissioner

OMB No. 2502-0204 (exp 3/31/97)
Worksheet for Section 8
Tenants Who Were Converted from Rent
Supplement Or RAP (10/1/81 to 9/30/84)
When They Were Age 62 or Older

U.S. Department of Housing
and Urban Development
Office of Housing
Federal Housing Commissioner

APPENDIX 4

IMPORTANT: * Read Appendix 2 of Handbook 4350.3 before you complete this Form. The Appendix tells you which version of the Worksheet you must use.
* If a 10/84 HUD-50059 F has never been used for this Tenant, prepare a HUD-50059REF-F before you complete this Worksheet. (Follow the instructions in Appendix 36.)

<table>
<thead>
<tr>
<th>Name of Tenant</th>
<th>Name of Project</th>
<th>Unit Number</th>
</tr>
</thead>
</table>

Part A – COMPUTE THE TOTAL TENANT PAYMENT THAT WOULD BE REQUIRED WITHOUT THE PROTECTION OF THE 10% CAPS

A-1. _______ Monthly Income (Item 31 + 12).
A-2. _______ Monthly Adjusted Income (Item 43 + 12).
A-3. _______ HCDA Percentage (Item 48).
A-4. _______ Monthly Adjusted Income x HCDA Percentage (A2 x A3).
A-5. _______ 10% of Monthly Income (Line A1 x .10).
A-6. _______ Welfare Rent (Applies only to welfare recipients in as-paid States or Counties).
A-7. _______ TOTAL TENANT PAYMENT (TTP).

Enter the largest of Lines A4, A5, or A6.

**************************************************************************
READ ALL OF THE FOLLOWING STATEMENTS. CHECK EACH STATEMENT THAT IS TRUE.
**************************************************************************

☐ The Tenant’s last ANNUAL recertification used a HUD-50059F AND the Family was NOT affected by the rent increase limitations. (Item 55 of the last 10/84 HUD-50059 was checked "NO.")

☐ Tenant does NOT now receive Section 8, Rent Supplement or RAP assistance.

☐ Line A7 = Line A5.

IF YOU: * left ALL of the above boxes blank, GO TO PART B.
* checked one or more boxes, STOP WORK and:
1) Transfer Line A7 to Item 50 of the HUD-50059; and
2) Enter "NO" in Item 66 of the HUD-50059.
Part B - Compute what the tenant's annual and adjusted income would have been under the pre-1984 definitions of income and allowances

ANNUAL INCOME

B-1. $_______ Annual income based upon 1984 rules (item 31 of the HUD-50059).

B-2. Check each situation that applies to this family's current circumstances. For each box you check, enter the amount requested. (Obtain from verification forms.)

   a. □ $_______ The family has assets in excess of $5,000 and imputed income from assets (item 27 of the HUD-50059) is greater than actual income from assets (item 26c of the HUD-50059). Enter the difference (item 27 minus total in item 26c).

   b. □ $_______ The family receives employment income from a full-time student who is: 1) 16 years of age or older; and 2) NOT the head or spouse. Enter the full-time student's employment income.

   c. □ $_______ Excess tax credit NOT previously counted. (Complete ONLY if management previously did NOT consider excess credits.)

B-3. $_______ Increase in annual income caused by 1984 changes (add B2a through B2c).

B-4. $_______ Annual income based upon pre-1984 rules (Line B1 minus Line B3).

B-5. $_______ Monthly income based upon pre-1984 rules (Line B4 divided by 12).

B-6. [Reserved.]

ADJUSTED INCOME

B-7. $_______ Allowable medical expenses. Complete lines a through c for ALL tenants.

   a. $_______ Total medical expense (obtain from the verification forms you just completed. For nonelderly households, these expenses will not appear on the HUD-50059 you are now preparing.)

   b. $_______ 3% of total annual income (.03 x B4).

   c. $_______ Line a minus line b. If line a is less than 0 equal to line b, enter zero.

B-8. $_______ Unusual expenses.

   a. $_______ Child care. Note: enter the portion of lte 37 that enables a family member to work (as opposed to going to school).

   b. $_______ Care of handicapped/disabled. (Obtain from item 39a of HUD-50059)

   c. Add lines B8a and B8b and enter the answer on line B8.

B-9. $_______ Allowance for minors using the pre-1984 definition of minors.

   a. _______ Number of minors. Enter the number of household members who are age 17 or younger or full-time students. DO NOT COUNT HEAD, SPOUSE OR FOSTER CHILDREN.

   b. Multiply line B9 by $300 and enter the answer on line B5.

B-10. $_______ Total allowances based upon pre-1984 rules (total of lines B7 + B8 + B9).

B-11. $_______ Adjusted income based upon pre-1984 rules (Line B4 minus line B10).

B-12. $_______ Monthly adjusted income based upon pre-1984 rules (Line B11 divided by 12).
If a HUD-50059F Worksheet has previously been used for this Tenant, GO TO PART C.

If this is the FIRST time this HUD-50059F Worksheet has been used for this Tenant, read both statements below. Check any statement that is true.

- No refund was required for the HUD-50059 that was in effect on 9/30/84.
  (Zero was entered on Line C1a of Column J of the HUD-50059REF-F).
- You did NOT check any of the boxes in B2 or B6 of this Form.

IF YOU:  * left one or both boxes blank, GO TO PART C.
        * checked BOTH boxes, STOP WORK AND:
          1) Transfer Line A7 to Item 50 of the HUD-50058; and
          2) Enter "NO" in Item 55 of the HUD-50039.

### Part C - Compute Limitations on Increases in Total Tenant Payment

<table>
<thead>
<tr>
<th>C-1</th>
<th>$1000</th>
<th>TTP UNDER MOST RECENT METHOD. Read only until you find a statement (A) or (B) that applies to this Tenant. Check the box next to that statement and follow the instructions for that box. CHECK ONLY ONE BOX.</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td></td>
<td>If an annual recertification was effective on or after 10/1/84 AND it is NOT the recert used in Column C of page one of the HUD-50059REF-F, multiply:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$1000 x 10% = $1000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Otherwise, multiply:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$1000 x 10% = $1000</td>
</tr>
</tbody>
</table>

b. The last Worksheet prepared for this Tenant was this HUD-50059F Worksheet. Multiply:

| C3   | $1000 | |
| C4   | 50    | |

### C-2.5

110% of Line C1. (Line C1 x 1.10).

### C-3.5

TTP FOR UPCOMING YEAR. Check the type of recertification you are preparing and follow the instructions for that type of recertification.

a. Annual. Enter the lesser of A7 or C2.

b. Interim. Enter the lesser of A7 or C1.

### C-4

Was the Family affected by the HURRA Limitations?

- If C3 = A7, check NO AND GO TO Line C5.  NO.
- In all other cases, check YES AND GO TO Line C5.  YES.

### C-5

Percentage of Adjusted Income Charged. (C3 divided by B12) Round to two decimal places (e.g., 00.00%).

### C-6

Transfer the answers on Lines C3 and C4 of this Worksheet to the HUD-50058 as directed below:

<table>
<thead>
<tr>
<th>Transfer</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>C3</td>
<td>50</td>
</tr>
<tr>
<td>C4</td>
<td>55</td>
</tr>
</tbody>
</table>
Worksheet for Section 8
Tenants Who Were Converted From Rent
Supplement (On or After 10/1/84)
When They Were Age 62 or Older

U.S. Department of Housing
and Urban Development
Office of Housing
Federal Housing Commissioner

IMPORTANT: * Read Appendix 2 of Handbook 4350.3 before you complete this Form. The Appendix tells you which version of the Worksheet you must use.
* If this Tenant was already converted AND a HUD-50059g has never been used for this Tenant, follow the special instructions in Appendix 37.

Name of Tenant | Name of Project | Unit Number
--- | --- | ---

Part A – COMPUTE THE TOTAL TENANT PAYMENT THAT WOULD BE REQUIRED WITHOUT THE PROTECTION OF THE 10% CAPS

| A-1 | A-2 | A-3 | A-4 | A-5 | A-6 | A-7 |

READ ALL OF THE FOLLOWING STATEMENTS. CHECK EACH STATEMENT THAT IS TRUE.

- The Tenant's last recertification used a 10/84 version of the HUD-50059g AND the Family was NOT affected by the rent increase limitations. (Item 55 of the last 10/84 HUD-50059 was checked “NO.”)
- Tenant does NOT now receive Section 8, Rent Supplement or RAP assistance.
- Line A7 = Line A8.
- If you checked one or more boxes, STOP WORK and:
  1) Transfer Line A7 to Item 50 of the HUD-50059; AND
  2) Enter “NO” in Item 55 of the HUD-50059.
- If the Tenant moved in or after 10/1/84, GO TO PART C.
- In all other cases, GO TO PART B.

Part B – COMPUTE WHAT THE TENANT'S ANNUAL AND ADJUSTED INCOME WOULD HAVE BEEN UNDER THE PRE-1984 DEFINITIONS OF INCOME AND ALLOWANCES

<table>
<thead>
<tr>
<th>ANNUAL INCOME</th>
<th>ADJUSTED INCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>B-1</td>
<td>$</td>
</tr>
</tbody>
</table>
| B-2 | CHECK each situation that applies to this Family's current circumstances. For each box you check, enter the amount requested. (Obtain from verification forms.)

a. $ The Family has assets in excess of $5,000 AND imputed income from assets (Item 27 of the HUD-50059) is greater than actual income from assets (Item 26d of the HUD-50059). Enter the difference (Item 27 minus total in Item 26d).

b. $ The Family receives employment income from a full-time student who is: 1) 18 years of age or older; and 2) NOT the head or spouse. Enter the full-time student's employment income.

c. $ Excess tax credit NOT previously counted. (Complete ONLY if management previously did NOT consider excess credits.)

B-3 | $ Increase in Annual Income caused by 1984 Changes (Add B2s through B2c).

B-4 | $ ANNUAL INCOME BASED UPON Pre-1984 Rules (Line B1 minus Line B3).

B-5 | $ MONTHLY INCOME Based Upon Pre-1984 Rules (Line B4 divided by 12).

B-6 | RESERVED.

B-7 | $ ALLOWABLE MEDICAL EXPENSES. Complete Lines a through c for ALL Tenants.

a. $ Total Medical Expense (Obtain from the verification forms you just completed. For Non-Elderly households, these expenses will not appear on the HUD-50059 you are now preparing.)

b. $ 3% of Total Annual Income (.03 × B4).

c. $ Line a minus Line b. If Line a is less than or equal to Line b, enter zero.

B-8 | $ UNUSUAL EXPENSES.

a. $ CHILD CARE. NOTE: Enter the portion of Item 57 that enables a Family Member to work (as opposed to going to school).

b. $ CARE OF HANDICAPPED/DISABLED. (Obtain from Item 39 of HUD-50059.)

c. Add Lines B8a and B8b and enter the answer on Line B8.

B-9 | $ ALLOWANCE FOR MINORS Using the Pre-1984 Definition of Minors.

a. NUMBER OF MINORS. Enter the number of household members who are age 17 or younger or full-time students. DO NOT COUNT HEAD, SPOUSE OR FOSTER CHILDREN.

b. Multiply Line B9a by $300 AND enter the answer on Line B9.

B-10 | $ TOTAL ALLOWANCES Based Upon Pre-1984 Rules (Total of Lines B7 + B8 + B9).

B-11 | $ ADJUSTED INCOME Based Upon Pre-1984 Rules (Line B4 minus Line B10).

B-12 | $ MONTHLY ADJUSTED INCOME Based Upon Pre-1984 Rules (Line B11 divided by 12).

- If the current Head/Spouse was 62 or older on 10/1/84, GO TO PART D.
- OTHERWISE, GO TO PART C.
Part C – Compute Limitations on Increases in Total Tenant Payment

C-1. $________ TTP Under Most Recent Method. Read only until you find a statement (a,b) that applies to this Tenant. Check the box next to that statement and follow the instructions for that box. Check only one box.

a. ☐ The Tenant is now being converted from Rent Supplement.

b. ☐ The last Worksheet prepared for this Tenant was a 10/83 version of the HUD-50059g.

1. Gross Rent (Item 46 of HUD-50059) $________

2. 30% of Gross Rent (30 x (1) above) $________

3. * If the last Worksheet prepared for this Tenant was a 5/83 version of the HUD-50059d, enter C4 of the LAST Worksheet. (If C4 is blank, enter A3 of the LAST Worksheet.)

   %

   * Otherwise, enter 25%.

4. Multiply:

   \[ \text{B12 of THIS Worksheet} \times \frac{\text{Percent in (3) above}}{\text{(If B12 is blank, use A2 of THIS Worksheet.)}} = $\] $________

   * Pick the greater of (2) or (4) and transfer that amount to Line C1.

C-2. $________ 110% of Line C1. (Line C1 x 1.10).

C-3. $________ TTP for Upcoming Year. Check the type of recertification you are preparing and follow the instructions for that type of recertification.

   a. ☐ Annual. Enter the lesser of A7 or C2.

   b. ☐ Interim. Enter the lesser of A7 or C1.

C-4. Was the Family affected by the HURRA Limitations?

   * If C3 = A7, check NO and GO TO Line C8. ☐ NO.

   * In all other cases, check YES and GO TO Line C5. ☐ YES.

C-5. Percentage of Adjusted Income Charged. (C3 divided by B12. If B12 is blank, use A2.) Round to two decimal places (e.g., 00.00%).

C-6. Transfer the answers on Lines C3 and C4 of this Worksheet to the HUD-50059 as directed below:

<table>
<thead>
<tr>
<th>Transfer</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>C3</td>
<td>50</td>
</tr>
<tr>
<td>C4</td>
<td>55</td>
</tr>
</tbody>
</table>

STOP WORK ON THIS FORM.

*---------------------------------------------------------------------*

ENTER THE ANSWER IN C1 AND GO ON TO C2.
*---------------------------------------------------------------------*
Part D - COMPUTE LIMITATIONS ON INCREASES IN TIP FOR TENANTS AGE 62 OR OLDER

COMPLETE THIS PART D ONLY IF THE INSTRUCTIONS AT THE END OF PART B REQUIRED YOU TO DO SO.

D-1. _______ ANNUAL INCOME (Obtain from HUD-50059 or FHA-2501 in force on 10/1/84. Enter the date that form was effective: ____/____/____).

D-2. _______ ADDITIONAL INCOME Derived From New Household Members and Members who Recently Became Employed.

   a. Was anyone, who is listed on the HUD-50059 you are now preparing, NOT listed on the form used for Line D1?
      □ YES  □ NO

   b. Is there any adult who is listed on the HUD-50059 you are now preparing who:
      1. was listed as unemployed on the form used on Line D1;
      2. is NOT working; or
      3. is not NOW a full-time student?
      □ YES  □ NO

IF YOU ANSWERED:
   "YES" to one or both of D2a and D2b, GO TO PART E.
   "NO" to both D2a and D2b, enter zero on Line D2 and GO to D3.

D-3. _______ TOTAL INCOME TO BE CONSIDERED.
   (D1 + D2).

D-4. _______ ALLOWABLE MEDICAL EXPENSE. (Enter the amount from D4c.)

   a. $ _______ Total Medical Expense (Obtain from Line B7a).
   b. $ _______ 3% of Annual Income Under Pre-1984 Rules. (.03 x D3)
   c. $ _______ Line D4a minus Line D4b. If Line D4a is less than or equal to Line D4b, enter zero.

D-5. $ _______ ALLOWANCE FOR MINORS. (Obtain from Line B8).

D-6. $ _______ UNUSUAL EXPENSES. (Obtain from Line B8).

D-7. $ _______ TOTAL ALLOWANCES. (D4 + D5 + D6).


D-10. _______ TIP THAT WOULD HAVE BEEN REQUIRED IF Tenant Had Not Become Subject To Annual Recertifications. READ ONLY UNTIL you find a statement that applies to this tenant. Check the box next to that statement and follow the instructions for that box. Enter the answer on Line D10. CHECK ONLY ONE BOX.

   a. □ 25% was entered in Item 46 of the last HUD-50059 prepared for this Tenant.
      1. 30% of Gross Rent
         (.30 x Item 46 of HUD-50059) = $ _______
      2. D9 of THIS Wkst. x .25 = $ _______
      3. Enter the greater of (1) or (2) = $ _______
         Transfer the answer to D10 AND GO TO D11.

   b. □ The last Worksheet completed for this Tenant was one of the Forms listed below.

      1. Enter the % charged in Part C of the Tenant's last Worksheet. Complete only one line.

      | If the Last Worksheet was: | Enter % of Adj. Income Charged: | From LAST Worksheet Use Line: |
      |---------------------------|-------------------------------|-----------------------------|
      | HUD-50059a dated 5/83     |     %                       | C6                          |
      | HUD-50059d dated 5/83     |     %                       | C4                          |
      | HUD-50059d dated 10/84    |     %                       | D14                         |
      | HUD-50059g dated 10/84    |     %                       | D14                         |

   2. Multiply:

      $ _______ x % above = $ _______
      D8 of THIS Wkst.

   Transfer the answer to D10 AND GO TO D11.

D-11. $ _______ 110% of Line D10. (Line D10 x 1.10).

D-12. $ _______ TIP FOR UPCOMING YEAR. Check the type of action you are processing and follow the instructions for that type of action.

   a. □ Annual. Enter the lesser of A7 or D11.
   b. □ Interim. Enter the lesser of A7 or D10.

D-13. Was the family affected by the HURRA Limitations?
   * If D12=D11, check NO and GO TO Line D15. □ NO.
   * In all other cases, check YES and GO TO D14. □ YES.

D-14. _______ Percentage of Adjusted Income Charged. (D12 divided by D9). Round to two decimal places (e.g., 00.00%).

D-15. Transfer the answers on Lines D12 and D13 of this Worksheet to the HUD-50059 as directed below:

   Transfer: Item
   D12  50
   D13  86

STOP WORK ON THIS FORM.

Prepared By (Name and Date) Supervisory Review By (Initials and Date)

Page 3 of 4
**E-1. ADDITIONAL INCOME from New Household Members. Complete This Line ONLY if You Answered "YES" in D2a. On Line a below, enter the name of anyone who:

1. is listed on the HUD-50059 you are now preparing; but
2. was not listed on the form used for Line D1.

For each member you list, complete one column of the following chart:

<table>
<thead>
<tr>
<th>A. FIRST NAME:</th>
<th>B. HOUSEHOLD INCOME ATTRIBUTABLE TO THIS MEMBER: (Obtain from the HUD-50059 you are now preparing; Enter this member's portion of Items 26a and Item 28b through e.)</th>
<th>C. How much of the income shown on Line B3 is attributable to this Member?</th>
<th>D. ADDITIONAL INCOME from New Household Members. (Line E1b minus Line E1c):</th>
<th>E. Add all entries on Line E1d and transfer the total to Line E1.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>a. ____________</td>
<td>b. $__________</td>
<td>c. $__________</td>
<td>d. $__________</td>
</tr>
</tbody>
</table>

**E-2. ADDITIONAL INCOME from Newly Employed Adults. Complete This Line ONLY if you answered "YES" in D2b. In Column a below, enter the name of anyone who: a) is listed on the HUD-50059 you are now preparing; and b) meets the three characteristics listed below:

1. was listed as unemployed on the form used on Line D1;
2. is NOW working; AND
3. is not NOW a full-time student. For each member you list, enter the employment income attributable to that member.

<table>
<thead>
<tr>
<th>COLUMN A. NAME</th>
<th>COLUMN B. ANNUAL EMPLOYMENT INCOME (Obtain these amounts from Item 28 of the HUD-50059 you are now preparing.)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$__________ yr.</td>
</tr>
<tr>
<td></td>
<td>$__________ yr.</td>
</tr>
<tr>
<td></td>
<td>$__________ yr.</td>
</tr>
</tbody>
</table>

Total (Add all entries in Col. B.)
Transfer the answer in Col. B to Line E2.

**E-3. ADDITIONAL INCOME TO BE CONSIDERED (Line E1 + Line E2).**

TRANSFER E3 TO LINE D2 AND GO ON TO D3.
Worksheet for Section 8 Tenants Who Were Converted From RAP (On or After 10/1/84) When They Were Age 62 or Older

U.S. Department of Housing and Urban Development
Office of Housing
Federal Housing Commissioner

IMPORTANT: Read Appendix 2 of Handbook 4350.3 before you complete this Form. The Appendix tells you which version of the Worksheet you must use.

- If this Tenant was already converted AND a HUD-50059h has never been used for this Tenant, follow the special instructions in Appendix 37.

<table>
<thead>
<tr>
<th>Name of Tenant</th>
<th>Name of Project</th>
<th>Unit Number</th>
</tr>
</thead>
</table>

Part A - Compute the Total Tenant Payment That Would Be Required Without the Protection of the 10% Caps

| A-3. | HCDA Percentage (Item 48). |
| A-5. | 10% of Monthly Income (Line A1 x .10). |
| A-6. | Welfare Rent (Applies only to welfare recipients in as-paid States or Counties). |
| A-7. | TOTAL TENANT PAYMENT (TPP). Enter the largest of Lines A4, A5, or A6. |

******************************************************************************
READ ALL OF THE FOLLOWING STATEMENTS. CHECK EACH STATEMENT THAT IS TRUE.
******************************************************************************

☐ Tenant moved in on or after October 1, 1984.
☐ The Tenant's last ANNUAL recertification used a 10/84 version of the HUD-50059ch AND the Family was NOT affected by the rent increase limitations. (Item 55 of the last 10/84 HUD-50059 was checked "NO").

IF YOU:
- left ALL of the above boxes blank, GO TO PART B.
- checked one or more boxes, STOP WORK and:
  1) Transfer Line A7 to Item 50 of the HUD-50059; and
  2) Enter "NO" in Item 55 of the HUD-50059.

Part B - Compute What the Tenant's Annual and Adjusted Income Would Have Been Under the Pre-1984 Definitions of Income and Allowances

ANNUAL INCOME

B-1. $ ________ ANNUAL INCOME Based Upon 1984 Rules (Item 31 of the HUD-50059.)

B-2. CHECK each situation that applies to this Family's current circumstances. For each box you check, enter the amount requested. (Obtain from verification forms.)

a. ☐ $ ________ The Family has assets in excess of $5,000 AND imputed income from assets (Item 27 of the HUD-50059) is greater than actual income from assets (Item 26d of the HUD-50059). Enter the difference (Item 27 minus total in Item 26d).

b. ☐ $ ________ The Family receives employment income from a full-time student who is: 1) 18 years of age or older; and 2) NOT the head or spouse. Enter the full-time student’s employment income.

c. ☐ $ ________ Excess tax credit NOT previously counted. (Complete ONLY if management previously did NOT consider excess credits.)


B-4. $ ________ ANNUAL INCOME BASED Upon Pre-1984 Rules (Line B1 minus Line B3).

B-5. $ ________ MONTHLY INCOME Based Upon Pre-1984 Rules (Line B4 divided by 12).

B-6. CHECK any situation that applies to this Family's current circumstances.

a. ☐ The Household expects medical expenses AND NEITHER the current Head or Spouse will be 52 or older, handicapped or disabled on the date this HUD-50059 is effective. NOTE: These expenses were NOT included on the HUD-50059. (Obtain from verification forms you just completed.)

b. ☐ Item 39a of the HUD-50059 shows the family anticipates expenses for handicapped apparatus or care.

CHECK any statement that is true.

☐ All boxes in B2 and B6 are blank.
☐ The last Worksheet prepared for this Tenant was a 5/83 or later version of the HUD-50059 or c AND the Family was NOT affected by the rent increase limitations.

- IF YOU checked BOTH of the above boxes, STOP WORK and follow the STOP WORK instructions in Part A.

- OTHERWISE, GO TO B-7.
### ADJUSTED INCOME

<table>
<thead>
<tr>
<th>B-7. $</th>
<th>ALLOWABLE MEDICAL EXPENSES. Enter the answer from Line B7c.</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. $</td>
<td>Total Medical Expense (Obtain from the verification forms you just completed).</td>
</tr>
<tr>
<td>b. $</td>
<td>3% of Total Annual Income (.03 x B4).</td>
</tr>
<tr>
<td>c. $</td>
<td>Line a minus Line b. If Line a is less than or equal to Line b, enter zero.</td>
</tr>
</tbody>
</table>

**CHECK any statement that is true.**

- [ ] All three boxes in Line B2 are blank.
- [ ] Line B6b is blank.
- [ ] Line B7 is zero.

The last Worksheet prepared for this Tenant was a 5/83 or later version of the HUD-50059a or c AND the Family was NOT affected by the rent increase limitations. (The answer on the last HUD-50059 was "NO".)

* IF YOU checked ALL of the above boxes, STOP WORK and follow the STOP WORK instructions in Part A*

* OTHERWISE, GO TO B-8.*

### UNUSUAL EXPENSES.

<table>
<thead>
<tr>
<th>B-8. $</th>
<th>CHILD CARE. NOTE: Enter the portion of item 37 that enables a Family Member to work (as opposed to going to school).</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. $</td>
<td>CARE OF HANDICAPPED/DISABLED</td>
</tr>
<tr>
<td>b. $</td>
<td>Include the amount of the expenses described in B6b. (Obtain from item 30b of HUD-50059.)</td>
</tr>
<tr>
<td>c. $</td>
<td>Add Lines B8a and B8b and enter the answer on Line B8.</td>
</tr>
</tbody>
</table>

### ALLOWANCE FOR MINORS Using the Pre-1984 Definition of Minor.

<table>
<thead>
<tr>
<th>B-9. $</th>
<th>NUMBER OF MINORS. Enter the number of household members who are age 17 or younger or full-time students. DO NOT COUNT HEAD, SPOUSE OR FOSTER CHILDREN.</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. $</td>
<td>Multiply Line B8a by 300 AND enter the answer on Line B9.</td>
</tr>
</tbody>
</table>

### TOTAL ALLOWANCES Based Upon Pre-1984 Rules (Total of Lines B7 + B8 + B9).

<table>
<thead>
<tr>
<th>B-10. $</th>
<th>ADJUSTED INCOME Based Upon Pre-1984 Rules (Line B4 minus Line B10).</th>
</tr>
</thead>
</table>

### MONTHLY ADJUSTED INCOME Based Upon Pre-1984 Rules (Line B11 divided by 12).

### CHECK ANY STATEMENT THAT IS TRUE.

- [ ] The last Worksheet prepared for this Tenant was a 5/83 or later version of the HUD-50059 a or c AND the Family was NOT affected by the rent increase limitations. (The answer on the last HUD-50059 was "NO".)

- [ ] Adjusted Income Based Upon Pre-1984 Rules is less than Adjusted Income Based Upon Pre-1984 Rules. (Line A2 is less than Line B12.)

* IF YOU: * left one or both of the above boxes blank, GO TO PART C.*

* checked BOTH of the above boxes, STOP WORK ON THIS FORM AND:*

1. Transfer Line A7 to item 50 of the HUD-50550; and
2. Enter "NO" in item 55 of the HUD-50559.

### Part C - COMPUTE LIMITATIONS ON INCREASES IN TOTAL TENANT PAYMENT

<table>
<thead>
<tr>
<th>C-1. $</th>
<th>TTP UNDER MOST RECENT METHOD. Read only until you find a statement (a) that applies to this Tenant. Check box a or b and follow the instructions for that box.</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. The Tenant is NOW being converted from RAP.</td>
<td></td>
</tr>
<tr>
<td>Check Only ONE of the three small boxes below and follow the instructions for that box.</td>
<td></td>
</tr>
<tr>
<td>The last worksheet completed for this Tenant was a 5/83 version of the HUD-50059c. Multiply:</td>
<td></td>
</tr>
<tr>
<td>$B12 of THIS Worksheet $C6 of the LAST Wst. $C1</td>
<td></td>
</tr>
<tr>
<td>(If C6 is blank, use A3 of the LAST Worksheet.)</td>
<td></td>
</tr>
</tbody>
</table>

The last Worksheet prepared for this Tenant was a 10/84 version of the HUD-50059c. Multiply: |
| $B12 of THIS Worksheet $C5 of the LAST Wst. $C1 |

This will be the first time the 1981 HCDA formulas have been applied to this Tenant. (This Tenant's rent has never been calculated using a 10/84 or later version of the HUD-50059.) Complete Part D of this Worksheet AND transfer the answer to Line C1.

<table>
<thead>
<tr>
<th>C-2. $</th>
<th>110% of Line C1. (Line C1 x 1.10).</th>
</tr>
</thead>
<tbody>
<tr>
<td>C-3. $</td>
<td>TTP FOR UPCOMING YEAR. Check the type of recertification you are preparing and follow the instructions for that type of recertification.</td>
</tr>
<tr>
<td>a.</td>
<td>Annual. Enter the lesser of A7 or C2.</td>
</tr>
<tr>
<td>b.</td>
<td>Interim. Enter the lesser of A7 or C1.</td>
</tr>
</tbody>
</table>

### Was the Family affected by the HURRA Limitations?

- [ ] If C3 = A7, check NO AND GO TO Line C6.* NO .
- [ ] In all other cases, check YES AND GO TO Line C5.* YES.

<table>
<thead>
<tr>
<th>C-4. $</th>
<th>Percentage of Adjusted Income Charged. (C3 divided by B12). Round to two decimal places (e.g., .0004%).</th>
</tr>
</thead>
</table>

Transfer: |
| Item C3 | 50 |
| Item C4 | 55 |

STOP WORK ON THIS FORM.

### Part D - DETERMINE WHAT THE TOTAL TENANT PAYMENT WOULD HAVE BEEN UNDER PRE-1981 RAP FORMULA

<table>
<thead>
<tr>
<th>D-1. $</th>
<th>Utility Cost Attributable to the Unit and Paid by the Owner.</th>
</tr>
</thead>
<tbody>
<tr>
<td>D-2. $</td>
<td>Utility Allowance (Item 45).</td>
</tr>
<tr>
<td>D-3. $</td>
<td>Line D1 + Line D2.</td>
</tr>
</tbody>
</table>

**NOTE:** D1 is not the same as the Utility Allowance. Obtain D1 from the HUD Field Office. If the Field Office waived the use of Utility Costs Attributable to the Unit, write N/A on Line D1.

ENTER THE ANSWER ON LINE C1 AND GO ON TO LINE C2.

Prepared By (Name and Date): 
Superintend Review By (Name and Date): 

3/92 Page 2 of 2 HUD-50059 h (10-84)
Worksheet for Previously HUD-Owned Projects

U.S. Department of Housing and Urban Development
Office of Housing
Federal Housing Commissioner

4350.5
APPENDIX 4

OMB Approval No. 2502-0204 (exp. 4-30-90)

IMPORTANT: Read Appendix 2 of Handbook 4350.3 before you complete this Form. The Appendix tells you which version of the Worksheet you must use.

<table>
<thead>
<tr>
<th>Name of Tenant</th>
<th>Name of Project</th>
<th>Unit Number</th>
</tr>
</thead>
</table>

**Part A – COMPUTE THE TOTAL TENANT PAYMENT THAT WOULD BE REQUIRED WITHOUT THE PROTECTION OF THE 10% CAPS**

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A-3.</td>
<td>HCDA Percentage (Item 48).</td>
</tr>
<tr>
<td>A-4.</td>
<td>Monthly Adjusted Income x HCDA Percentage (A2 x A3)</td>
</tr>
</tbody>
</table>

| A-5. | 10% of Monthly Income (Line A1 x .10). |
| A-6. | Welfare Rent (Applies only to welfare recipients in as-paid States or Counties). |
| A-7. | TOTAL TENANT PAYMENT (TTP). Enter the largest of Lines A4, A5, or A6. |

******************************************************************************
**READ ALL OF THE FOLLOWING STATEMENTS. CHECK EACH STATEMENT THAT IS TRUE.**
******************************************************************************

- The Tenant’s last ANNUAL recertification used a 10/84 version of the HUD-50059: AND the Family was NOT affected by the rent increase limitations. (Item 55 of the last 10/84 HUD-50059 was checked “NO.”)

  - IF you checked one or both boxes, STOP WORK and:
    1) Transfer Line A7 to Item 50 of the HUD-50059; AND
    2) Enter “NO” in Item 55 of the HUD-50059.

- IF the Tenant moved in on or after 7/1/84, GO TO PART C.
- In all other cases, GO TO PART B.

**Part B – COMPUTE WHAT THE TENANT’S ANNUAL AND ADJUSTED INCOME WOULD HAVE BEEN UNDER THE PRE-1984 DEFINITIONS OF INCOME AND ALLOWANCES**

### ANNUAL INCOME

| B-1. | $ _____ ANNUAL INCOME Based Upon 1984 Rules (Item 31 of the HUD-50059). |
|      |                                                                             |

| B-2. | CHECK each situation that applies to this Family’s current circumstances. For each box you check, enter the amount requested. (Obtain from verification forms.) |
|      |                                                                             |

- a. $ _____ The Family has assets in excess of 55,000 AND imputed income from assets (Item 27 of the HUD-50059) is greater than actual income from assets (Item 26 of the HUD-50059). Enter the difference (Item 27 minus total in Item 26). |

- b. $ _____ The Family receives employment income from a full-time student who is: 1) 18 years of age or older, and 2) NOT the head or spouse. Enter the full-time student’s employment income. |

- c. $ _____ Excess tax credit NOT previously counted. (Complete if management previously did NOT consider excess credits.) |

|      |                                                                             |

| B-4. | $ _____ ANNUAL INCOME BASED Upon Pre-1984 Rules (Line B1 minus Line B3). |
|      |                                                                             |

| B-5. | $ _____ MONTHLY INCOME Based Upon Pre-1984 Rules (Line B4 divided by 12). |
|      |                                                                             |

| B-6. | RESERVED. |

### ADJUSTED INCOME

| B-7. | $ _____ ALLOWABLE MEDICAL EXPENSES. Complete Lines a through c for ALL Tenants. |
|      |                                                                             |

- a. $ _____ Total Medical Expense (Obtain from the verification forms you just completed. For Non-Elderly households, these expenses will not appear on the HUD-50059 you are now preparing.) |

- b. $ _____ 3% of Total Annual Income (03 x B4). |

- c. $ _____ Line a minus Line b. If Line a is less than or equal to Line b, enter zero. |

| B-8. | $ _____ UNUSUAL EXPENSES. |
|      |                                                                             |

- a. $ _____ CHILD CARE. NOTE: Enter the portion of Item 37 that enables a Family Member to work (as opposed to going to school). |

- b. $ _____ CARE OF HANDICAPPED/DISABLED. (Obtain from Item 39a of HUD-50059.) |

- c. Add Lines B8a and B8b and enter the answer on Line B8. |

| B-9. | $ _____ ALLOWANCE FOR MINORS Using the Pre-1984 Definition of Minors. |
|      |                                                                             |

- a. $ _____ NUMBER OF MINORS. Enter the number of household members who are age 17 or younger or full time students. DO NOT COUNT HEAD, SPOUSE OR FOSTER CHILDREN. |

- b. Multiply Line B8a by 3300 AND enter the answer on Line B9. |

| B-10. | $ _____ TOTAL ALLOWANCES Based Upon Pre-1984 Rules (Total of Lines B7 + B8 + B9). |
|      |                                                                             |

|      |                                                                             |

| B-12. | $ _____ MONTHLY ADJUSTED INCOME Based Upon Pre-1984 Rules (Line B11 divided by 12). |
|      |                                                                             |

GO TO PART C.
C-1. $ _______ TTP UNDER MOST RECENT METHOD. Read only until you find a statement (a,b,c) that applies to this Tenant. Check the box next to that statement and follow the instructions for that box. CHECK ONLY ONE BOX.

a. ☐ The Tenant is NOW paying a rent based upon the HUD-owned (290) rules AND will begin to receive Section 8.

\[ \text{B12 of THIS Worksheet} \times .25 = $ \text{C1} \]
(if B12 is blank, use A2.)

b. ☐ The last Worksheet prepared for this Tenant was a 10/84 version of the HUD-50059.

\[ \text{B12 of THIS Worksheet} \times \text{C5 of the LAST Wkst.} = $ \text{C1} \]
(if B12 is blank, use A2.)

c. ☐ The Tenant began to receive Section 8 on or after 7/1/82 AND the last Worksheet prepared for this Tenant was a 9/83 version of HUD-50059.

1) Enter percent from Line C6 of the LAST Worksheet.

\[ \text{Line C6 of the LAST Worksheet} = \% \]
(if C6 is blank, use A3.)

2) Enter the lesser of percent above or 27.5%.

\[ \% \text{ Line C6} \times .25 = $ \text{C1} \]
(if C6 is blank, use A2.)

3) Enter B12 of THIS Worksheet.

\[ \text{B12 of THIS Worksheet} = $ \text{C1} \]
(if B12 is blank, use A2 of this Wkst.)

4) Multiply Line (2) \times Line (3) = $ ....... C1

TRANSFER THE ANSWER TO LINE C1 AND GO ON TO LINE C2.

C-2. $ _______ 110\% of Line C1. (Line C1 \times 1.10)

C-3 $ _______ TTP FOR UPCOMING YEAR. Check the type of recertification you are preparing and follow the instructions for that type of recertification

a. ☐ Annual. Enter the lesser of A7 or C2

b. ☐ Interim. Enter the lesser of A7 or C1

C-4. Was the Family affected by the HURRA Limitations?

- If C3 = A7, check NO and GO TO Line C5

- In all other cases, check YES and GO TO Line C5.

C-5 Percentage of Adjusted Income Change:

\[ \text{C3 divided by B12 if B12 is blank, use A2. Round to two decimal places} \]

\[ \text{(e.g., } 0.00\% \text{)} \]

C-6. Transfer the answers on Lines C1 and C4 of this Worksheet to the HUD-50059 as directed below:

<table>
<thead>
<tr>
<th>Transfer</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>C3</td>
<td>50</td>
</tr>
<tr>
<td>C4</td>
<td>55</td>
</tr>
</tbody>
</table>

Public reporting burden for this collection of information is estimated to average 15 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Reports Management Officer, Office of Information Policies and Systems, U.S. Department of Housing and Urban Development, Washington, D.C. 20410 3600 and to the Office of Management and Budget, Paperwork Reduction Project (2502-0204), Washington, D.C. 20503.