

**Income - Assets, Allowances, Expenses, Verifications & Calculations**

**Allowances**

Allowances are part of the annual income calculation and deducted from the total gross income. Do not allow deductions and/or allowances unless the household is eligible for the allowance at the time of the calculation or TBRA Rental Assistance Contract begin date. Example: If the contract begin-date is 6/1/07 and a family member does not turn 18 until 6/2/07, the member is still eligible for the dependent allowance. The allowance must be removed at the next action processed after the family member turns 18.

**Dependent Allowance**

Anyone under the age of 18 (except the head of household) is a dependent until their 18<sup>th</sup> birthday. Each dependent household member is awarded a \$480 dependent allowance. An Interim is processed to remove the dependent allowance and add applicable income immediately following their 18<sup>th</sup> birthday.

A dependent household member is any person:

- Who is less than 18 years of age, or
- Who is disabled (except head, spouse/co-head), or
- Who is an eligible full-time student (except head, spouse/co-head), or
- A spouse or co-head under 18 years of age.

**Adopted Minor Children:** Include adopted minor children (but not foster children) as dependents. Allow the dependent allowance for each adopted minor child in the household.

An unborn child does not receive the dependent allowance. An Interim Re-examination is processed after the child is born. The unborn child is not considered when determining TBRA Housing Coupon eligibility (bedroom) size.

Never include the head, co-head, or spouse as a dependent unless under the age of 18.

- If a head of household, spouse, or co-head is under 18, earned income is excluded. Verify family status and income (via check back) when head, spouse, or co-head turns 18.

Never include a foster child, foster adult or live-in aide as a dependent. Children of live-in aides are considered a live-in aide and do not qualify as a dependent. Do consider

foster children/adults and live-in aides when determining the TBRA Housing Coupon eligibility size.

Dependent Full-time student: Verify the status of all *dependent* full-time high school and college students 18 years and older via the School Verification (TBRA #13). The verification must confirm full time (not part time) student status to qualify for the dependent allowance. If verification of full-time high school status is needed during the summer months, the allowance may be given until the status can be verified in the fall (tickler) when school opens. For home-schooled students, family certification is acceptable.

### **Disability and/or Elderly Allowance**

A \$400 per household (not per person) allowance is granted when the head, co-head, or spouse is elderly or disabled. The head, co-head or spouse must be age 62 or over, currently receive federal Supplemental Security Income (SSI) or Social Security Disability Income (SSDI) payments, or have a valid Verification of Disability and/or Special Medical Needs (TBRA #16), completed by a licensed health care provider (see below), to receive the allowance. Only one allowance is granted per family, even if both the head and spouse are disabled.

Receipt of monthly federal SSI or SSDI is sufficient verification of disability for the recipient in determining eligibility for the Disability Allowance, provided the recipient is under age 65. A Verification of Disability and/or Special Medical Needs (TBRA #16) is not required.

A \$480 per person dependent allowance is granted for every disabled adult member (other than the head, co-head, or spouse) who resides in the unit.

Unacceptable verification of disability includes receipt of Social Security, RSDI or other SSA benefits other than SSI/SSDI; a letter or statement from a doctor that does not include the disability language/definition contained in the Verification of Disability and/or Special Medical Needs (TBRA #16); and family self-certification.

### **Verification of Disability and/or Special Medical Needs (TBRA #16)**

Disabilities, medical expenses, and other special needs are verified by having a Health Care Professional (HCP) complete a Verification of Disability and/or Special Medical Needs (TBRA #16) for the participating family.

A TBRA #16 is required if a member does not receive SSI or SSDI. If the Health Care Professional (HCP) completing the form indicates the disability is permanent, the form is retained in the permanent non-purge section of the file for the duration of the tenant's participation on the program and no further verification is necessary.

If the HCP indicates the disability is not permanent, the tenant is granted the allowance for this contract period only. The disability must be re-verified annually.

If the Verification of Disability and/or Special Medical Needs (TBRA #16) form indicates the tenant is not disabled, the allowance cannot be granted.

Only the following licensed medical Health Care Professional's (HCP) may sign a Verification of Disability and/or Special Medical Needs (TBRA #16):

Doctor of Osteopathy (DO) ---- Medical Doctor (MD) ---- Psychiatrist

If the TBRA administrator is unable to obtain the requested TBRA #16 for the tenant/family member, it should be noted on a Supplemental Information Form (TBRA #31) that the attempt was made, and the tenant/family member did not provide the requested document. While it is important to request this documentation, no penalty will be applied to the household because they were unable to provide it.

(June 2008)