P-2214 DEDUCTIONS

P-2214A Shelter Expenses (20-08)

Shelter expenses may be self-reported, unless questionable. Enter clear case notes (CATN) regarding shelter.

During An Interview

When reviewing shelter information during an interview ask for the following:

- landlord's name and mailing address
- mortgage company's name and mailing address
- property tax payment information (due dates and address of town clerk)
- lot rent payment information (name and mailing address of lot owner)
- home insurance company name and mailing address

Exploring Money Mismanagement

Explore if the household is current on their shelter expense, and if the answer is no, find out details about the situation. Money mismanagement can be explored if the household is more than two months behind on payments. Vendor payments can be offered for any household. More information can be found in the Reach Up Protective Payments Money Mismanagement Procedure P-2231B.

Property Tax

Use gross property tax if the household owns their home.

Use net property tax if a household does not own their home but is responsible for paying the net property taxes as part of their rental agreement.

Town Code

Use correct Town Code on the address panel (ADDR) in ACCESS. The code will determine which maximum monthly housing allowance ($400 outside Chittenden County, $450 within Chittenden County) is used in the Reach Up budget.

Special Housing Allowance

When determining the Reach Up benefit, a special housing allowance of up to

$90 is added to the Basic Need Standard for household who pay more in shelter costs than the regular housing allowance ($400 outside Chittenden County, $450 within Chittenden County).

Example 1:
- Sara's rent is $750 a month.
- She lives in Burlington, so the maximum shelter allowance is $450.
- Her rent is $300 more than the maximum allowance.
- She is eligible for a $90 special housing allowance.

Example 2:
- Brian's rent is $460 per month.
- He lives in Rutland, so the maximum shelter allowance is $400.
- His rent is $60 more than the maximum allowance.
- He is eligible for a $60 special housing allowance.

Example 3:
- Sara's rent is $375 per month.
- She lives in Brattleboro, so the maximum shelter allowance is $400.
- She is not eligible for a special housing allowance.

Subsidized Housing

Subsidized housing can include:

- Section 8 housing
- Project Based housing
- Public housing

Subsidies may be attached to the person, a unit, a landlord, or a property/structure.

ACCESS allows for the maximum shelter amount if subsidized housing is indicated.

Fuel and Utility Allowance

Reach Up budgets will include $70 of "unearned income" if the household has a fuel or fuel/utility allowance (subsidy) used in the calculation of their rent by the housing authority.

Reach Up budgets will include $30 of "unearned income" if the household has a

utility allowance (subsidy) used in the calculation of their rent by the housing authority.

Allow for the actual amount of allowance or subsidy received if the household indicates theirs is less than the standard amount.

If the Fuel/Utility amount is not indicated on the application or is “Unknown”, find out the actual amount of allowance paid by calling the landlord or the Housing Authority.

Verification of Public Assistance

When a Reach Up household applies for public housing, the housing authority sends a "Verification of Public Assistance" form to Economic Services Division (ESD) Central Office to be completed and returned. A budget is completed using the rental maximum, and the resulting grant amount is reported.

Example: A RUFA budget for the Davis family, who have no income other than their RUFA benefit is as follows:

Basic Needs (3)	$ 891.00
Shelter Standard	+ 400.00
(outside Chittenden County)	
TOTAL	1291.00
(Ratable Reduction)	x .496
	640.33
Benefit	$640

The $640 benefit amount is reported to the local housing authority on the Verification form.

Questionable Subsidized Housing

A Shelter Expense Statement (form 202H) or statement including the same information can be completed and signed by either the organization that provides the subsidy or the landlord of the participant’s housing.

GA/EA Clients and Residents of Shelter/Transitional Housing

Reach Up households receiving General/Emergency Assistance and/or living in a shelter or a transitional housing program may receive the full housing allowance ($400 or $450 depending on the county).

These types of housing situations are viewed similar to subsidized housing. Counting the full housing allowance gives the family more opportunity to save and move into permanent housing.

Adverse Weather Conditions (AWC)

If someone is housed under Adverse Weather Conditions (AWC) for one night in a month, they would receive the housing allowance for that month.

Special Housing Allowance while receiving GA/EA Housing

If the household is paying or required to save more than $400 or $450 (depending on county) they may qualify for the special housing allowance as well. This situation is rare.

Vermont Rental Subsidy

Reach Up households receiving Vermont Rental Subsidy will also receive the full housing allowance ($400 or $450 depending on county).

Shared Housing

Households that share a home and shelter expenses with people other than those in their household, can each claim their share of the shelter costs if the sum of the shares is not more than the total shelter expenses. This is true if the households are all receiving separate Reach Up benefits, or if only one of the households is receiving Reach Up benefits.

Example: Sarah receives Reach Up. She and her kids share an apartment with her friend Brad. Brad is not the parent of any of the kids, and Brad and Sarah are not married, so he is not a mandatory Reach Up household member. The apartment is in Barre and rent is $950 with utilities included. Sarah and Brad both pay $475 each directly to the landlord. Sarah can claim the $475 she pays for rent, with $400 allowed for the maximum shelter allowance, and $75 as the special housing allowance.

The same would be true if Brad had children and receives his own Reach Up benefit.

Room Rent vs. Room and Board Expense vs. Board Expense

When a household claims a room and board expense, clarify if meals (board) are included or not. The inclusion of meals in room and board can impact the amount of Reach Up benefit the household is eligible to receive.

Room Rent paid (does not include meals)

A household that pays for a room in someone else's home can claim the amount they pay as a shelter expense. The household also qualifies for the basic needs standard when determining the Reach Up benefit amount.

Room and Board paid (includes meals)

If the room also includes board, meaning meals are included in the expense paid (this situation is rare), then the household will not be able to claim a shelter expense, and instead will only qualify for the room and board and other basic needs allowances found in Reach Up rule 2263.4 Room and Board Standards.

These standards are currently less than the Reach Up Basic Need Standards (Reach Up rule 2261.1).

Board paid (includes meals, but not room rent)

If the household only pays for board (meals), and does not pay a room rent (this situation is even more rare), then the household will not be able to claim a shelter expense, but will qualify for the Reach Up Basic Need Standards (Reach Up rule 2261.1).

BPS Support

Watch the ACCESS Eligibility Training Videos (HOME) Entering and Updating a Home Panel, (RENT) Entering a Rent Panel and (RBEX) Entering a Room and Board Expense Panel.

Entering Property Taxes on HOME panel

For households applying for 3SVT, enter the net property tax on a HOME panel coded T (T-Taxes)

Add a second HOME panel that shows the difference between the net property

taxes and the gross property taxes. This panel must be coded as R (R-RUFA REPAIRS ALLOWED FOR).

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10/29/18 11:57 HOMEOWNER EXPENSE  QUESTION 32 ( HOME . 01 )
                                   (LAST UPDATED:   /  /     :   ¦ ASPAGG   )

NAME OF PERSON                    EXPENSE      EXPENSE AMT     EXPENSE
PAYING MORTGAGE, TAXES OR INSURANCE  TYPE        $$$$$ ¢¢       FREQ
                                     -
                                   MONTHLY EXPENSE AMT
                                        $$$$$ ¢¢

HOMEOWNER EXPENSE TYPE:                EXPENSE-FREQ:
M - MORTGAGE                           M - MONTHLY
T - TAXES                              Q - QUARTERLY
R - RUFA REPAIRS ALLOWED FOR           S - SEMI-ANNUAL
L - TRAILER LOT RENTAL                 A - ANNUAL

USER: 034 FNX: STAT MODE: C RPTGRP:          PERIOD: 10 18 COMMAND:
DO: T IMS: ST2 REPORTING ADULT:                                      3
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Example: Net property taxes are $2000 annually. Gross property taxes are $3000 annually. Add HOME panel for $2000 annually as countable property taxes. Add a second HOME panel for $1000 annually, for R-RUFA REPAIRS ALLOWED FOR. This way, 3SVT budget will show $2000 annually for property taxes and the RUFA budget will show $3000 annually for property taxes.

Add a WARN to the case. Example: RUFA counts gross prop taxes. Workaround HOME panel has been added.

Entering HOME Expenses for Non-Home Owners

If household does not own the home but is responsible for taxes and lot rent in lieu of or in addition to a monthly rent amount, include the total monthly amount on a RENT panel, rather than using HOME panels. Write a clear CATN indicating how RENT amount was determined.

Entering Subsidized Housing Fuel and Utility Allowance

If an “S” or a “P” is entered in TYPE and the RENT panel indicates heat and utilities are not included or utilities only are included (household may or may not pay for utilities, but definitely pays their own heat) ACCESS enters $70

automatically in budget.

If an “S” or a “P” is entered in TYPE and the RENT panel indicates heat only is included (household does not pay for heat but pays for their own utilities) ACCESS enters $30 automatically in budget.

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10/29/18 14:37 RENTAL EXPENSE     QUESTION 31 ( RENT . 01 )
                                     (LAST UPDATED: 04/12/18 15:33 ¦ ASPAGF   )

                                  INCL IN RENT          RENT AMT       MONTHLY
NAME OF PERSON WHO PAYS THE RENT   FUEL  UTIL     FREQ   $$$$$ ¢¢      $$$$$ ¢¢
                                    Y     N        M       150 00        150 00

**** SUBSIDIZED/PUBLIC HOUSING ****              (COMPLETE BELOW IF DIFFERENT)
Y/N TYPE BDRMS  RUFA SUBSIDY              FS / SF        FS / SF       FS / SF
 Y   P           STD   ACT     HH   USED  INKIND         RENT AMT      MONTHLY
                  30                                FREQ   $$$$$ ¢¢      $$$$$ ¢¢
                                                     M       150 00        150 00
        ********************     R V P    D A T A    ********************

    RVP CODE: C              RENT AMT: $ 00150 00                    ARREARAGE
                                                                     *********
LANDLORD NAME: BRISTOL FAMILY HOUSING________        TOTAL ARREARS:   00000 00
LANDLORD C/O:                                        AMT TO BE PAID:  00000 00
LANDLORD STREET:   142 MERCHANTS ROW_______                          -----------
CITY, STATE, ZIP:  RUTLAND________ VT 05701 ____     BALANCE LEFT:

USER: 934 FNX: STAT MODE: D RPTGRP:                 PERIOD: 10 18 COMMAND:
DO: Y IMS: GY1 REPORTING ADULT:                                              3
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GA/EA Clients and Residents of Transitional Housing

Enter a RENT panel for the Head of Household.

In the “INCL IN RENT” section of the RENT panel, enter “N” under “FUEL” and “Y” under “UTIL”. This will prevent the client from getting the heated renter SF benefit. They will get the $21 Fuel benefit, and if/when they move into an apartment they can get the difference in SF benefits.

In the “RENT AMT” section of the RENT panel, enter the maximum shelter amount ($400 or $450 depending on county).

If the household is not paying anything towards their rent (i.e. all housing costs are covered by EA), enter $0.01 in the “COMPLETE BELOW IF DIFFERENT” section, so that the rent is correctly accounted for in 3SVT and Fuel budgets.

In the “SUBSIDIZED/PUBLIC HOUSING” section enter “N”.

Do not enter a UTIL panel for these households.

Vermont Rental Subsidy

Follow the SOP VRS RU 2/1/18 located on the intranet.

Questionable Room Rent

- If lease agreement is between the room renter and the person receiving the rent the person that is receiving the room rent can complete the shelter form or statement.
- If the lease agreement is between the room renter and landlord, but the room renter pays their portion of rent to a roommate who then pays the landlord, the landlord should be completing the form.

Questionable Shelter at Recertification

For a review application, if shelter is questionable remove the shelter from the budget and send out a request for information (RL2) to the participant stating: "If the shelter verification is not returned, a shelter allowance will not be included and your benefits will not be increased [to the higher amount it was prior to the removal of shelter]."