

ESG INCOME AND ASSET CALCULATION WORKSHEET

Check one:

- Initial
- 3-month
- 6-month
- 9-month
- 12-month
- Other: _____

CLIENT NAME: _____ DATE: _____

HMIS/ DV ID #: _____

This worksheet is to be utilized by Rapid Rehousing and Prevention providers. **Acceptable replacement for this form, is use of the HUDExchange CPD Income Calculator.** The income calculator can be accessed through this link: <https://www.hudexchange.info/incomecalculator/> . If the Subrecipient uses the CPD Income Calculator, the income calculation must be printed and added to the client file. Additional information and training webinar on how to use the CPD Income Calculator can be found here: <https://www.hudexchange.info/trainings/courses/using-the-income-calculator-to-determine-annual-income-webinar1/>

- For Rapid Rehousing income certification must be completed after financial assistance has been provided for one year.
- For Prevention, income certification is to be completed at intake as a part of eligibility screening, and as part of the re-evaluation process every three months.
- For Rapid Rehousing and Prevention, the client’s household income must be at or below 30% of AMI.
 - Under the ESG program, income eligibility is based on the HUD income limits in effect at the time of income verification. Income eligibility is not based on HUD income limits that correspond with the grant year under which the ESG funds were awarded. Income limits can be found here: <https://www.huduser.gov/portal/datasets/il.html>

Source documentation of income and assets must be attached to this worksheet (e.g., wage statement, unemployment compensation statement, public benefits statement, bank statement). *To the extent that source documents are unobtainable*, a written statement by the relevant third party (e.g., employer, government benefits administrator) or the written certification by intake staff of the oral verification by the relevant third party of the income the program participant received over the most recent period for which representative data is available. *To the extent that source documents and third-party verification are unobtainable*, the written certification by the program participant of the amount of income the program participant received for the most recent period representative of the income that the program participant is reasonably expected to receive over the 3-month period following the evaluation.

Income			
Household Member	Source of Income	Calculation: Gross Amount x Pay Period/Frequency =	Annual Income

Assets					
Household Member #	Asset Type	Cash Value of Asset	Interest Rate (%)	Actual Annual Income	Description/Notes

- 1. Total Income \$ _____
- 2. Total Income from Assets \$ _____
- 3. Imputed income from assets \$ _____
 Calculate only if the Net Cash Value of Assets is greater than \$5,000.
 Multiply the total cash value of all assets by .004.
- 4. Total Annual Income (add Line 1 plus the greater of Lines 2 or 3) \$ _____
- 5. 30% of AMI for your area \$ _____
Household is income ineligible if line 4 is greater than line 5.

By signing below, I certify that this information is complete and accurate for my household. I agree to provide, upon request, documentation on all income sources to the HUD Grantee/Program Administrator.

ESG Client Signature: _____ Date: _____

Verified by ESG Staff: _____ Date: _____