

How to Lower Your Rent and Boost Your SNAP Benefits

An Advocacy Tool for Elder and Disabled
Public Housing Tenants in Massachusetts



* October 2018 *

MLRI
Massachusetts Law Reform Institute

Why Use this Kit?

This advocacy tool explains how tenants in public, subsidized and voucher housing can lower their rent and maximize their SNAP (Supplemental Nutrition Assistance Program) benefits.

In July of 2018, the Department of Transitional Assistance (DTA) issued guidance to help low income older adults and persons with disabilities use their housing rent calculation information to boost their SNAP benefits. DTA now accept the “rent computation worksheet” for SNAP if it identifies an amount claimed for medical expenses for rent. In August of 2018, the Department of Housing and Community Development (DHCD) notified all housing agencies of this DTA SNAP policy guidance.

This booklet is available on both www.MassLegalHelp.org and www.MassLegalServices.org. Please distribute it freely to tenants and organizations working with tenants.

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Acknowledgments: We would like to thank the following individuals for their contributions to this advocacy tool: 2017/18 AmeriCorps Member Wesley Chrabaesz (MLRI); AmeriCorps Member Rafael Fields (Justice Center of Southeast Mass); 2018/19 Emerson National Hunger Fellow Yesenia Jimenez (MLRI); Patricia Baker and Judith Liben, (MLRI advocacy staff).



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Calculating Your Rent

Public and subsidized housing in Massachusetts is typically administered by housing authorities or owners of subsidized developments. There are many types of vouchers and subsidies, both federal and state-funded. Because public and subsidized housing has capped funding, there are often wait-lists to qualify.

Public and Subsidized Housing Rent Calculations

1. How is My Rent Calculated?

The amount you are required to pay in rent is based on your countable earned or unearned income and the allowable expenses or deductions. Most tenants pay about 30% of their annual net income as their rent obligation.

2. What is a rent computation worksheet and why do I need it?

A “**rent computation worksheet**” is a document created by your housing agency that shows what income and deductions were used to calculate what you owe in rent. You can find examples of rent computation worksheets in the Appendix.

The rent computation worksheet is useful in **two ways**:

#1. You can see if the housing agency calculated your rent correctly, and ask them to review it if you think they made a mistake.	#2. You may be able to use this worksheet to report your medical costs to DTA and boost your SNAP benefits. (See more below)
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3. Do I have a right to my rent computation worksheet?

YES! All public and subsidized housing tenants have a right to get a copy of your housing documents – including their rent computation worksheet. Contact your housing agency directly for a copy. You may need to ask in writing.

If the housing agency or manager refuses to give you a copy of your rent computation worksheet, ask to speak with a supervisor or the executive director. If you are still denied access, you can request a written explanation or request a grievance hearing. (See Question 6 below).

Lowering Your Rent with Medical Expenses

4. What medical expenses can I claim to lower my rent?

You can claim medical expenses as an income deduction for your rent if you are age 62 or older (for federal housing), or you are disabled. You can claim unreimbursed medical expenses if they exceed 3% of your gross annual income.

***Example:** James receives \$1,200 per month in Social Security income, which is \$14,400 each year. James can claim the medical expenses that exceed 3% of his annual income – over \$432 per year. Claiming unreimbursed medical expenses he incurs that exceed the 3% threshold can help lower his rent.*

You will need to show the housing agency that you have already paid or you owe the medical expenses. You can also claim medical expenses of a spouse or child living with you, even if that person is neither elder nor disabled.

You **cannot** claim medical expenses that will be reimbursed by a third party.

You can claim health insurance co-pays and premiums, the costs of doctor and hospital visits, physical therapy, lab work, acupuncture, prescription medication, home health aides and more. A list of acceptable medical expenses for housing can be found in the Appendix

5. When can I submit medical expenses to my LHA or housing agency?

You can submit proof of medical expenses to your housing authority when you apply for housing and during your annual tenant recertification. Be sure to **keep a copy** of the documents you give to the housing agency.

State and federal rules also allow elderly and disabled tenants to do so at other times.

If you have a **state-aided housing subsidy**, you can request an interim redetermination of your rent if you are also reporting a decrease in your monthly gross income.

If you have a **federal housing subsidy**, you can request an interim recertification if you are reporting any changes in your monthly income or expenses that may affect your rent. You can also request a rent review if you or a member of your household turns age 62, or was recently determined disabled.

6. How do I show I am a tenant with disabilities?

To qualify as disabled, you need to receive Social Security or Supplemental Security Income (SSI) based on disability, or you need to have other proof of a disability that meets the housing rules. The housing agency should tell you what proofs are needed.

Getting Rent Calculations Fixed

7. If I gave the LHA or housing agency proof of medical expenses, but my rent did not go down, what can I do?

If you think the housing agency did not calculate your rent correctly, you can request an informal meeting with your manager. You can also have a trusted friend, relative, community agency or other third-party help you. Any third party that helps you will need your written consent to talk with your housing agency about your housing case information. See Appendix G.

If an informal meeting with your housing agency is not satisfactory, you can file a grievance. Most housing agencies have written grievance procedures. Ask your housing agency for a copy of your grievance procedure. Often the grievance procedure is spelled out in your lease.

When housing agency makes a decision about the amount of your rent, they should give you a copy of your right to file a grievance. Make sure that you file a grievance by the deadline on the notice and in the way described in the notice. Otherwise, you may lose your right to a grievance.

Most housing authorities or housing agencies have a standard grievance form that you can use to request a grievance hearing. If your housing agency doesn't have one, you can write your own letter. More information on the grievance process is below.

Housing Advocacy Resources

For legal advice and representation: Contact a local Legal Services office. Go to [Masslegalservices.org/FindLegalAid](https://masslegalservices.org/FindLegalAid)

To file a grievance with your state or federal housing authority, see: Using your Public Housing Grievance Process: A Know Your Rights Guide for Public Housing Tenants in Massachusetts: [Masslegalhelp.org/housing/lt3-your-grievance-process.pdf](https://masslegalhelp.org/housing/lt3-your-grievance-process.pdf)

For information on how rent is calculated in federal subsidy programs, see the HUD Occupancy Handbook Chapter 5: Determining Income & Calculating Rent available at https://www.hud.gov/sites/documents/DOC_35649.PDF This HUD handbook also lists what household income is countable and when.

For more information on reporting changes for tenants with federal housing subsidies, visit [Hud.gov/sites/documents/43503C7HSGH.PDF](https://hud.gov/sites/documents/43503C7HSGH.PDF)

For information on calculating rent in state subsidy programs, visit [Mass.gov/public-housing-programs-by-type](https://mass.gov/public-housing-programs-by-type).

For more information on interim recertification of state-aided housing subsidies, visit [Mass.gov/files/documents/2018/04/09/760cmr6.pdf](https://mass.gov/files/documents/2018/04/09/760cmr6.pdf)

Federal and state rules governing how public and subsidized rent is calculated:

- 24 C.F.R. §5.403, §5.611; 24 C.F.R §960.259, §982 (C.F.R. is the Code of Federal Regulations)
- 760 C.M.R §6.05, 760 C.M.R §49.05 (C.M.R. is the Code of Massachusetts Regulations)

Calculating Your SNAP



SNAP is the Supplemental Nutrition Assistance Program, formerly called food stamps. Administered by the Department of Transitional Assistance (DTA), SNAP is a 100% federally-funded benefit available to all low income households that meet the eligibility rules.

SNAP Nutrition Benefits Calculation

8. How are SNAP benefits calculated?

The amount you get in monthly SNAP benefits is based on your countable income, certain income deductions and your household size. The maximum monthly SNAP benefit amounts for households of 1 to 4 persons are listed below (higher amounts for larger households):

Household size	Max SNAP
1	\$192
2	\$353
3	\$505
4	\$642

In general, most SNAP households are expected to use 30% of their net income toward food costs. For every \$3 of net countable income, the maximum SNAP benefit for your household is lowered by \$1.

Example: Sally lives alone, gets \$1,000 in a pension. She has \$300 in net countable income after allowable deductions. DTA counts \$100 toward the maximum SNAP benefit of \$192 for 1 person. Sally qualifies for \$92/month SNAP.

NOTE: If you are receiving the maximum SNAP monthly benefits (listed in chart above), you do not need to submit proof of medical expenses to DTA. Your SNAP benefits will not increase above the maximum monthly level.

9. How do I get my SNAP calculation?

When you apply for SNAP, or your case is recertified, you will get a notice telling you if your benefits were approved or denied. The notice should include information on the income and deductions used to calculate your SNAP benefits. The DTA notice should include a page that says: “How We Decided your SNAP Amount.” See sample notice in Appendix E.

If you did not receive the DTA notice – or you misplaced it – you can get a copy from DTA. You can log onto the “DTA Connect” at www.DTAConnect.gov and download a copy, or you can call the DTA Senior Assistance Office at 1-833-712-8027 and ask them to mail a copy.

Boosting SNAP with Medical Expenses

10. What kinds of medical expenses can I claim to boost my SNAP?

You can claim medical expenses to boost your SNAP if you are either age 60 or older, or you are disabled (any age). You can claim unreimbursed medical expenses that exceed \$35 a month. If you have at least \$35/month, DTA will calculate your SNAP using a “standard medical deduction” of \$155 per month.

Example: Jane is a disabled veteran and receives a VA Pension of \$1,000. She has \$40/month in pharmacy co-pays and travel to the pharmacy. Jane qualifies for the \$155 standard medical expense deduction in the SNAP math.

You can get a higher deduction above \$155/month if you have actual medical expenses that exceed \$190/month (\$190 is the amount of the \$35 threshold plus \$155 standard deduction).

DTA will ask for proof of ongoing medical expenses or large one-time bills that you owe. You cannot claim medical expenses that are reimbursed by a third party.

You can claim health insurance co-pays and premiums, the costs of doctor and hospital visits, physical therapy, lab work, acupuncture, prescription medication, home health aides, and over-the-counter health supplies. You can also claim travel costs to and from your health care provider or pharmacy. Unlike public and subsidized housing, you can only claim medical expenses for the individuals in your SNAP household who are age 60+ or disabled. A flier with a sample of acceptable medical expenses for SNAP can be found at Appendix H.

IMPORTANT: You can also submit your *rent computation worksheet* to claim medical expenses for SNAP. Sample Rent Calculation Worksheets in are in Appendix C and D. See how to do this in Q.13 below.

11. How do I show DTA that I am disabled?

To qualify as disabled under the SNAP rules, you need to receive a benefit based on severe disability, such as Social Security Disability or SSI, MassHealth as disabled, or certain Veterans' and Railroad Retirement benefits. Unlike housing, DTA does not accept other proof of disability if you are not receiving a disability-based benefit.

12. When can I submit my medical expenses to DTA?

You can claim your medical expenses when you first apply, when your SNAP is recertified or *any time*. Here are the core ways to get DTA your proofs:

- **Fax to:** 617/887-8765,
- **Mail to** DTA Document Processing Center, P.O. Box 4406, Taunton, MA 02780;
- **Log on to** DTA Connect by downloading the mobile app or going to DTAConnect.com.
- **Go in person** to your local DTA office to drop them off.

Proof of medical expenses can include copies of bills, receipts (paid or unpaid), or any other proof that you have paid or owe a health care cost. This includes the costs of public transportation, the RIDE, taxi service or use of your car. You can also self-declare your mileage to and from the doctor or pharmacy and DTA will calculate travel with the federal mileage rate if you use your own car.

13. Will DTA accept a copy of my “rent computation worksheet” for my medical expenses?

YES! DTA will accept your rent computation worksheet if it lists an amount they have verified for your medical expenses. See Appendix C and D for sample rent calculations.

Example: Sam Smith is age 70 and applies for SNAP. He sends DTA his rent computation worksheet which confirms that Sam has \$5,000 in annual medical expenses, including his Medicare premium and other expenses. DTA can use that \$5,000 amount, divided by 12 months, for \$416/month of expenses. After subtracting the \$35/month threshold, Sam gets a monthly deduction of \$381 in the SNAP math.

Note: If your current monthly medical expenses are now higher than the rent computation worksheet, you can claim the higher expenses instead if it makes a difference in the SNAP math. You will need to give DTA proof of those expenses.

14. I have over-the-counter vitamins and other health care expenses my housing agency did not accept. Can I claim those for SNAP?

Yes. You can claim over-the-counter health expenses that were not used in your rent calculation. This could include vitamins, insulin, vision care, incontinence supplies, or other over-the-counter items recommended by your provider.

***Example:** Irene Jones is 70 years old and lives in public housing. She pays \$200/month for health insurance, which she claims for her rent calculation. Each month Irene also pays \$30 for vitamins, and \$40 for over-the-counter drugs recommended by her doctor. Monthly, her total out-of-pocket, over-the-counter medical expenses are \$70. If Irene sends DTA her rent computation worksheet plus her receipts for vitamins and over-the-counter drugs that are recurring monthly medical expenses, she can claim the \$70 over the counter in addition to the \$200/month claimed for public housing.*

15. If I haven't claimed any medical expenses for public housing, what medical expenses can I claim for SNAP?

As long as you are age 60+ or are disabled, you can claim any unreimbursed medical and health-related expenses that you owe or are paying down. You can also claim medical expenses incurred before you applied for SNAP if you are currently still paying those off. To see DTA's brochure listing examples of allowable medical expenses, see Appendix H.

16. If my spouse or children live with me, will DTA accept the rent computation worksheet as proof of our medical expenses?

It depends. DTA only allows households to claim their public housing medical expenses for SNAP where ALL tenants are either persons with disabilities or are age 60+. That's because the housing rules allow dependents of an elder or person with disabilities to claim their medical expenses, but the housing agencies do not always separate out and identify the medical costs of each tenant. If your housing agency does separate medical expenses by each household member, you should send that rent calculation statement to DTA.

You can still send DTA proof of your medical expenses to boost your SNAP, just not the rent calculation worksheet.

***Example:** Ronald, 63, and Lorraine, 55, live together in public housing. (Lorraine is not disabled). Ronald and Lorraine jointly claim medical expenses for their public housing. Ronald can give DTA proof of his own medical expense for SNAP, but DTA will not accept the rent computation worksheet because Lorraine is neither elderly nor disabled.*

Getting SNAP Calculations Fixed

17. What do I do if my SNAP benefits do not increase after I submit proof of my medical expenses?

If you are receiving the maximum SNAP benefit for your household, your SNAP will not increase by claiming more medical expenses. You are getting the full benefit amount.

If you are getting *less than* the full SNAP benefit and you send DTA proof of medical expenses or the rent computation worksheet, you can:

- Check your SNAP benefits by using the **DTA Connect** mobile app or online web portal at: DTAConnect.com
- Call the DTA's **Senior Assistance Office** at 833-712-8027 (for clients age 60 or older) to ask them if your SNAP benefits will increase.
- Call DTA's **Assistance Line** at 877-382-2363 (for clients under age 60).
- Go in person to a **local DTA office** and ask to meet with a worker about your SNAP case.

When you reach a SNAP worker, let them know that you submitted your rent computation worksheet or other proof of medical expenses. Ask the worker to confirm when your documents were received and if your SNAP will increase.

If the DTA worker says your SNAP benefits will not increase, ask for a reason why. You can also ask to speak to a DTA Supervisor. See Q 16 for more information about your rights in dealing with DTA.

18. If I disagree with the amount of my SNAP benefits or if DTA refuses to boost my SNAP, what can I do?

Be sure to confirm with DTA the status of your benefits first. If DTA refuses to boost your SNAP and you disagree with that decision, you can:

- Ask to speak with a Supervisor of the worker you spoke with.
- Call the DTA Ombudsman's Office at 617-348-5354.
- Request a fair hearing (file an appeal).
- Contact Legal Services.

Any third party that helps you needs your written consent to talk with DTA about your SNAP case information. Be sure to send that statement to DTA. It can be handwritten or a form. For a sample consent form, see Appendix F.

SNAP Resources

For legal advice and representation: Contact a local Legal Services office. Go to [Masslegalservices.org/FindLegalAid](https://www.masslegalservices.org/FindLegalAid)

To request a fair hearing, fill out the appeal form on the back of the DTA notice you receive. You can appeal any action taken by DTA, including if you disagree with the approved amount of the benefit. See more on Fair Hearings in the Advocacy Guide.

For information on how the SNAP program works and your rights, see the 2018 SNAP Advocacy Guide available at [Masslegalservices.org/content/2018-snap-advocacy-guide](https://www.masslegalservices.org/content/2018-snap-advocacy-guide)

To do a quick calculation for SNAP benefits, go to the SNAP Calculator [Masslegalservices.org/content/online-snap-calculator](https://www.masslegalservices.org/content/online-snap-calculator).

Federal and state rules governing how SNAP benefits and medical expenses are calculated:

- 7 C.F.R. §271.2, §273.9 (CFR is the Code of Federal Regulations)
- 106 C.M.R §361.210, §364.440, 450 (CMR is the Code of Massachusetts Regulations)

Appendices

- A. DTA letter to Community Partners on new SNAP policy to accept housing rent computation worksheets (August 2018)
- B. DHCD communication to all public housing agencies re use of housing rent computation worksheets (August 2018)
- C. Federal Public Housing Rent Computation Worksheet example
- D. State Public Housing Rent Computation Worksheet example
- E. DTA SNAP Benefit Calculation Notice example
- F. Permission to access DTA case information (sample form)
- G. Permission to access tenant case information (sample form)
- H. DTA Brochure on Claiming Medical Expenses for SNAP
- I. Eligible Medical Expenses for Public Housing Deduction

Appendix A: DTA Letter to Community Partners About New Policy



Commonwealth of Massachusetts Executive Office of Health and Human Services Department of Transitional Assistance

CHARLES D. BAKER
Governor

KARYN POLITO
Lieutenant Governor

MARYLOU SUDDERS
Secretary

JEFF McCUE
Commissioner

August 2018

To Community Partners:

This letter is to notify you of a new DTA policy that can help public and subsidized housing renters more easily verify their medical expenses when applying for Supplemental Nutrition Assistance Program (SNAP), and likely increase their benefits.

Under this new rule, households in which **every member** of the household is 60 years or older and/or a person with a disability may use their rent calculation as proof of medical expenses for SNAP benefits.

Beginning in July 2018, DTA began accepting the amount of medical expenses already verified by a local housing authority or regional housing agency as proof of medical expenses for SNAP. This verified medical expense amount can be found on a document that housing agencies call a "Rent Computation Worksheet".

Tenants can request a Rent Computation Worksheet from their local housing authority or regional housing agency to submit to DTA via the following methods:

- the DTA Connect Mobile Application or online web portal (www.dtaconnect.com)
- fax to 617-887-8765
- mail to Document Processing Center, P.O. Box 4406, Taunton, MA 02780

If a SNAP household has questions about this policy or their SNAP case, they can contact the DTA Assistance Line at 877-382-2363. SNAP recipients age 60+ can contact the DTA Senior Assistance Office at 833-712-8027.

Note: SNAP households may also claim the costs of over-the-counter health care supplies to boost their SNAP. This can include "medicine chest" items, vitamins, eye glasses, incontinence supplies, and other health care items not allowed for the rent computation. If a SNAP household has proof of these costs, please urge them to include them in their submission to DTA.

Appendix B: DHCD Communication to Housing Authorities about DTA's New SNAP Policy (similar communication sent to MRVP list serve on 8-24-18, impacting)

----- Forwarded message -----

From: <DHCD-Housing.Authority.Information.for.Other.Interested.Parties@chl-ppmailsec-003.state.ma.us>

Date: Fri, Aug 31, 2018 at 10:55 AM

Subject: DTA Policy Change Medical Expense

To: Mass Law Reform Institute <jliben@mlri.org>

Cc: "dhcd-lhaootherinterested@listserv.state.ma.us" <dhcd-lhaootherinterested@listserv.state.ma.us>

Dear Housing Authority Directors,

The Department of Transitional Assistance (DTA) can now accept rent computation worksheets from Local Housing Authorities in order to verify medical expenses for some households when applying for the Supplemental Nutrition Assistance Program (SNAP). Note, this is limited to situations where every member of the household is 60 years or older and/or a person with a disability.

See attached letter from DTA for more information.

DTA is hopeful that this will make it easier for households to claim medical expenses for their SNAP benefits. This policy change applies to all subsidized housing—public housing, Section 8, MRVP, DMH, AHVP, etc. so please share this information with other colleagues at your agency.

The only effect this DTA policy change should have on your agency is an increased request for rent computation worksheets, but we thought that you may appreciate a heads up.

Best Regards,

Amy Stitely

Associate Director

Division of Public Housing at DHCD

Similar DHCD e-communication sent by Cecilia Woodworth, MRVP Program Specialist to the MRVP list serve on 8-23-18.

Ms. Woodworth's e-blast stated: *This policy change applies to all subsidized housing—public housing, Section 8, MRVP, DMH, AHVP, etc. so please share this information with other colleagues at your agency. The only effect this DTA policy change should have on your agency is an increased request for rent computation worksheets, but I thought that you may appreciate a heads up.*

Appendix C: Federal Public Housing Rent Computation Worksheet

Owner's Certification of Compliance with HUD's Tenant Eligibility and Rent Procedures

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

For Personal Records ONLY - not for
Submission to the Federal Government

Record for Landlords
(Exp. 06/30/2017)

Section B. Summary Information																
1. Project Name Boston Housing Authority				12. Effective Date 01/01/2018				21. Unit Number 00206								
2. Subsidy Type 3. Secondary Subsidy Type 4. Property ID				13. Anticipated Voucher Date 01/01/2018				22. No. of Bedrooms 1								
5. Project Number XXXX				14. Next Recertification Date 01/01/2019				23. Building ID								
6. Contract Number XXXXX				15. Project Move-In Date 01/15/2018				24. Unit Transfer Code								
7. Project iMAX ID XXXX				16. Certification Type AR				25. Previous Unit No.								
8. Plan of Action Code				17. Action Processed				26. Security Deposit 217								
9. HUD-Owned Project?				18. Correction Type				27. 236 Basic/BMIR Rent 1,475								
10. Previous Housing Code				19. EIV Indicator				28. Market Rent 1,475								
11. Displacement Status Code				20. Prev. Subsidy Type				29. Contract Rent 29								
								30. Utility Allowance 29								
								31. Gross Rent 1,504								
								32. TTP at RAD Conversion								
Section C. Household Information																
33. No.	34. Last Name	35. First Name	36. Mi	37. Rel.	38. Sex	39. Race	40. Eth	41. Birth Date	42. Special Status	43. Stdnt Stat.	44. ID Code (SSN)	45. SSN Excp	46. Ctzn Code	47. Alien Reg. Number	48. Age	49. Work Codes
01	Doe	Jame			H	F		01/01/50			XXX-XX-XXXX				68	
02																
03																
04																
05																
06																
07																
08																
														53. Number of Family Members		0

Bottom of HUD form ▼

Section F. Allowances & Rent Calculations					
86. Total Annual Income	14,987	97. Deduction for Dependents	0	108. Total Tenant Payment	275
87. Low Income Limit	47,450	98. Child Care Expense (work)	0	109. TTP Before Override	
88. Very Low Income Limit	32,950	99. Child Care Expense (school)	0	110. Tenant Rent	246
89. Extremely Low Income Limit	19,800	100. 3% of Income	450	111. Utility Reimbursement	
90. Current Income Status	Ext Low	101. Disability Expense	0	112. Assistance Payment	1,229
91. Eligibility Universe Code		102. Disability Deduction	0	113. Welfare Rent	0
92. Sec. 8 Assist. 1984 Indicator		103. Medical Expense	4,011	114. Rent Override	
93. Income Exception Code		104. Medical Deduction	3,591	115. Hardship Exemption	
94. Police / Security Tenant?		105. Elderly Family Deduction	400	116. Waiver Type Code	
95. Survivor of Qualifier?		106. Total Deductions	3,991	117. Eligibility Check Not Required	
96. Household Citizenship Eligibility	E	107. Adjusted Annual Income	10,996	118. Extenuating Circumstances Code	

Previous versions of this form are obsolete.
This form also replaces HUD-50059-D, -E, -F, & -G.

Page 2 of __

form HUD-50059 (06/2014)
ref. HB 4350.3 Rev. 1

Appendix D: State Public Housing Rent Computation Worksheet

Danvers Housing Authority Massachusetts State 6672 - [REDACTED] Rent Computation Worksheet

Tenant Name: [REDACTED]
Unit Address: [REDACTED]
Danvers, MA 01923

Effective Date: 4/1/2017

1.	Incomes		
	A. Gross Assets	\$0.00	
	B. Gross Incomes	\$11,652.00	
	C. Gross Annual Income	<u>\$11,652.00</u>	<u>\$11,652.00</u>
2.	Exclusions		
	A. Elderly or Handicapped Head Allowance	\$0.00	
	B. Eligible Member(s) Allowance	\$0.00	
	C. Medical Expenses in Excess of 3% of Gross Income		
	a. Unreimbursed Medical Expenses	\$3,942.00	
	b. 3% of Gross Income	\$349.58	
	c. Unreimbursed Medical Expenses Deduction	\$3,592.44	
	D. Work Related Day Care Costs	\$0.00	
	E. Support Payments	\$0.00	
	F. Homemaking Expenses for Handicapped Individuals	\$0.00	
	G. Child Support Payment Expenses	\$0.00	
	H. Travel Expenses for Handicapped Individuals Who Cannot Use Public Transportation	\$0.00	
	I. Annual Heat Deduction	\$0.00	
	J. Non-Reimbursable Tuition and Fees	\$0.00	
	K. Other Exclusions	\$0.00	
	L. Total Exclusions	<u>\$3,592.44</u>	<u>\$3,592.44</u>
3.	Household Annual Net Income		<u>\$8,059.58</u>
4.	Household Monthly Net Income		<u>\$671.63</u>
5.	Tenant Rent (30.00%)		<u>\$201.00</u>

I understand that this is not a contract and does not bind either party. The above information is all true and complete to the best of my knowledge. I have no objection to inquiries being made for the purpose of verifying the statements made herein. Signed under the pains and penalties of perjury.

Tenant Signature
Interviewed by

[REDACTED SIGNATURE]

Date

3/21/17

Warning: Section 1001 of Title 18 of the U.S. Code makes it a criminal offense to make willful false statements of misrepresentations to any Department or Agency of the U.S. as to any matter within its jurisdiction.

Appendix E: DTA SNAP Benefits Calculation Notice

Massachusetts Department of Transitional Assistance

Dear [REDACTED]

What DTA decided: The Department has reopened your SNAP case. Your benefits start on 09/08/2018 at \$192.00 per month.

How we decided your benefit amount: Go to the pages at the end of this notice to see how we decided your benefit amount.

You will get your SNAP benefits on the 8th of each month.

The first SNAP benefit may be different from your regular monthly amount because it is for the period of 09/08/2018 to 10/07/2018.

Your certification period for SNAP benefits is from 09/08/2018 through 09/07/2019.

How We Decide Your SNAP Amount

We use your household's income and some expenses. In some cases, we count the income of a person in your household, even if that person is not getting benefits. Look below to see what we are counting for your household.

Who is in your SNAP household

People in your household who get SNAP benefits:

Name
[REDACTED]

People in your household who do not get SNAP benefits:

<u>Name</u>	<u>Reason</u>	<u>Effective Date</u>
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Income we are counting

Earned Income

<u>Name</u>	<u>Type</u>	<u>Reported Amt/Date</u>	<u>Amount We Use</u>
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Unearned Income

<u>Name</u>	<u>Type</u>	<u>Reported Amt/Date</u>	<u>Amount We Use</u>
[REDACTED]	RSDI	\$1,453.50	\$1,453.50/monthly average

Expenses we are counting

Dependent care expenses	\$0.00
Medical expenses (must be over \$35)	\$130.00
Child support (paid by household)	\$0.00
Housing expenses (rent, mortgage, taxes)	\$1,020.00
Heat or air conditioning	Yes
Phone	No
Electricity or other utility	No

Appendix F: Permission to Access DTA Case Information (sample consent form)

**DEPARTMENT OF TRANSITIONAL ASSISTANCE
Permission to Access DTA Client Case Information**

REQUEST FOR ACCESS TO CLIENT RECORD OF: _____
(Print Client's Full Name)

1. Client Information:

Date of Birth ___ / ___ / ___ Address: _____

Last 4 digits of SS#: ___ ___ ___ ___ or DTA "Agency ID" number: _____

2. I hereby authorize _____
(organization's name and city/town)

to have access to my DTA case record and case information, including any electronic records. I authorize this organization to discuss my application or benefits with a DTA case manager, supervisor, director or other DTA employee. This form is valid for 12 months unless I have stated otherwise on this form or in other communication.

3. I hereby certify that I am the client named above.

Client Signature

Date

Appendix G: Permission to Access Tenant Case Information (sample consent form)

Consent to Release Information Tenant Housing Information

TO: _____ Housing Authority or Housing Agency

FR: _____
Tenant's First and Last Name

Tenant's Date of Birth

Tenant's Address

I hereby authorize the _____ Housing Authority/Agency to release information from my tenant case file to the agency or individual listed below:

List name of individual or helping agency to receive information

Please release to this individual or agency the following information checked below:

- ___ Certificate of Compliance (HUD Form) with a summary of allowances and rent calculations
- ___ Rent Computation Work Sheet used to calculate my rent,
- ___ Notices sent to me about the amount of my rent and how it was calculated, or
- ___ OTHER (list): _____

Tenant Signature: _____

Date signed: _____

Appendix H: DTA Brochure on Claiming Medical Expenses for SNAP Benefits

Frequently Asked Questions

Who can claim medical expenses?

Anyone who is age 60 or older OR disabled and pays medical expenses of more than \$35 per month.

What type of proof is needed?

We need receipts or bills to show your medical expenses. Expenses must be verified for DTA to give you credit. If you need help getting proof of your expenses, talk to DTA.

Which medical expenses can be claimed?

Certain medical costs can reduce your income in the SNAP calculation. This brochure tells you what medical expenses you can claim.

Do I have to verify medical expenses each time I recertify for SNAP benefits?

If your regular *monthly* medical expenses have not changed since you verified them, you do not have to verify them again at your recertification. However, if your medical expenses have changed you must tell DTA at recertification. DTA will tell you if the change must be verified.

Send **copies** of proofs to DTA's Document Processing Center by fax or mail. Write your name and Agency ID or SSN on each document.

Fax: (617) 887-8765 **OR Mail:** DTA Document Processing Center, P.O. Box 4406 Taunton, MA 02780-0420

SNAP rules give you the right to claim allowable medical expenses. Verified medical costs (over \$35) will be deducted from your countable income so you may get more SNAP.

If your regular medical costs are between \$35.01 and \$190 each month, you may be eligible for the Standard Medical Deduction. Based on a household of one this deduction could add up to \$30 per month to your SNAP benefits.

If your regular medical costs are more than \$190 each month, you may be eligible for a higher deduction from your income.

Ask DTA if you have any questions about allowable medical expenses. DTA can also help you to get proof of your allowable medical costs.

A one-time medical cost, *such as a bill for a hospital stay, hearing aid or wheelchair*, may also be used for the medical expense deduction. Be sure to talk to DTA if you have a one-time medical expense.

Claiming and Verifying Medical Expenses May Increase Your SNAP



A MESSAGE FROM THE
DEPARTMENT OF
TRANSITIONAL ASSISTANCE

SNAP-MEB (Rev. 8/2015)
09-430-0815-05



Health Insurance Costs

You can claim your health insurance costs, both premiums and deductibles.



Health Related Supplies

You can claim health care supplies such as adult diapers, dentures, foot care supplies, hearing aids/batteries, prescription eyeglasses and contact lenses.



Home Health Care Costs

You can claim costs for home health care, adult day care or housekeeping services due to your age or illness.



Medical Costs Not Reimbursed by Insurance

You can claim your costs for doctor/clinic visits, dental care, physical therapy, emergency room, hospitalization or outpatient care that is not paid for by insurance.



Health Equipment

You can claim costs for sick room equipment, wheelchairs or mobility aids, prosthetics, personal emergency response systems, and communication equipment for the hearing or visually impaired.



Alternative Medical Treatments

You can claim costs for prescribed treatments such as chiropractic, acupuncture, or massage.



Prescription Drugs

You can claim out of pocket costs for prescription drugs, as well as postal fees for prescription drugs.

Car Mileage and Public Transportation Costs

You can claim the mileage for use of your car or cost of bus, subway, or taxi to a medical appointment or to a pharmacy.



Over-the-Counter Medicines

You can claim medications, such as pain relievers, antacids, vitamins, insulin, and herbal supplements that your health care provider tells you to take.



Service Animal Expenses

You can claim costs for service animals, including veterinary bills and food supplies.

Appendix I: Sample of Eligible Medical Expenses for Public Housing (Public Housing Occupancy Guidebook,)

Unreimbursed Medical Expense Costs

This deduction is granted only to elderly or disabled families (See the definition in Section 10.2 Elderly and Disable Family Deduction).

A range of unreimbursed medical expenses and services can be claimed, including, but not limited to the following, to the extent that the total medical expenses exceed 3 percent of annual income (the PHA must put definition in its ACOP. Use of IRS Medical Expenses, found in IRS publication 502, as guidance is acceptable):

- Services of health care professionals and health care facilities (doctors, nurses, practical nurses, therapists, hospitals, clinics, etc.);
- Laboratory fees, X-rays and diagnostic tests, costs for blood, and oxygen;
- Medical insurance premiums (including Medicare) and the insurance deductible;
- Prescription and non-prescription medicines (non-prescription medicines should be prescribed by a licensed medical professional);
- Transportation to/from treatment including the actual cost (e.g., bus fare) or if driving by car, a mileage rate based on IRS rules or other accepted standard;
- Medical care of a permanently institutionalized family member IF his/her income is included in annual income;
- Dental treatment including fees paid to the dentist for cleaning, fluoride treatments, sealants, x-rays; fillings, braces, extractions, dentures;
- Eyeglasses and contact lenses;
- Hearing aid and batteries, wheelchair, walker, scooter, artificial limbs;
- Attendant care or periodic attendant care;
- Payments on accumulated medical bills (that will be due in the year for which annual income is computed) for the services of physicians, nurses, dentists, opticians, mental health practitioners, chiropractors Hospitals, health maintenance organizations (HMO's), out-patient medical facilities, and clinics;
- Expenses paid to an HMO;
- Purchase or rental and upkeep of equipment (e.g., where there are tenant paid utilities, the additional utility costs to the tenant because of an oxygen machine);
- Skilled, semi-skilled and unskilled nursing services;
- An assistive animal and the upkeep and care of the animal; and
- Any other medically necessary service, apparatus or medication, as documented by third party verification.

