


# Students: Eligibility & Income

April 2024

## Contact Information



**Mailing Address:**  
TDHCA  
PO Box 13941  
Austin, TX 78711-3941

**Physical Address:**  
TDHCA  
221 East 11<sup>th</sup> Street  
Austin, TX 78701

**Website:** <https://www.tdhca.texas.gov>

**Division Phone Number:** (512) 305-8869  
or (800) 525-0657 (toll free in Texas only)

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## Announcements

### Schedule:

- The training will run from 9 am until approximately 12 pm (noon)
- We will take a mid-morning break
- Staff will present the training and allow for questions after each topic is covered

### Housekeeping:

- Certificates will be provided after the conclusion of the class
  - Certificates will be emailed by the GoTo Meeting platform, please make sure that you used the link emailed to you in order to receive your certificate. Certificates should be emailed this afternoon and will only be sent to persons that attended using the link provided to them. If you do not receive the certificate we will be unable to issue a replacement certificate; we rely on the GoTo Meeting platform to send these based on attendance.
- We suggest you silence your phones and put an “out of office” email response, if virtual, to help avoid distractions during the training
- Please pose questions and comments in the “Questions Box”

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## General Resources

- **HUD Handbook 4350.3**
  - [https://www.hud.gov/program\\_offices/administration/hudclips/handbooks/hshg/4350.3](https://www.hud.gov/program_offices/administration/hudclips/handbooks/hshg/4350.3)
  - Chapters 3 and 5 along with corresponding tools and exhibits
- **HUD Notice H 2023–10 and Notice PIH 2023–27**
  - <https://www.hud.gov/sites/dfiles/OCHCO/documents/2023-27pihn.pdf>
  - This document replaces Chapters 3 and 5 of the HUD 4350.3 until/unless a revised Handbook is released
  - This document was updated to include further clarifications on February 2, 2024
- **Technical Guide for Determining Income and Allowances for the HOME Program**
  - <https://files.hudexchange.info/resources/documents/HOMEGuideForIncomeAndAllowances.pdf>
- **24 CFR 5.609 – Annual Income**
  - <https://www.ecfr.gov/current/title-24/subtitle-A/part-5#5.609>
- **10 TAC**
  - <https://www.tdca.texas.gov/compliance-manuals-and-rules>

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## Department Resources

- **Compliance Forms**
  - <https://www.tdhca.texas.gov/compliance-forms>
- **Manuals and Rules**
  - <https://www.tdhca.texas.gov/compliance-manuals-and-rules>
- **Income and Rent Limits**
  - <https://www.tdhca.texas.gov/income-and-rent-limits>
- **Training and Presentations**
  - <https://www.tdhca.texas.gov/compliance-training>
  - <https://www.tdhca.texas.gov/compliance-program-training-presentations>
- **Contact List**
  - <https://www.tdhca.texas.gov/compliance-division-staff>



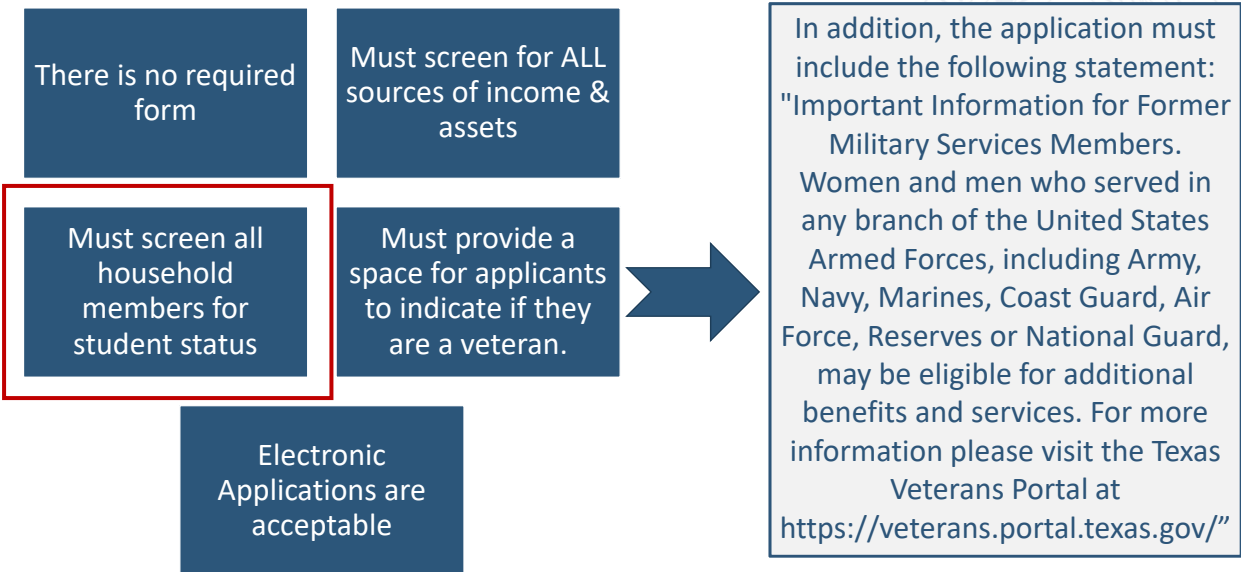
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## Student Eligibility



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## Student Eligibility: The Application



## Intake Application – Student Questions

**TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS  
INTAKE APPLICATION**

**Dear Applicant:**  
The information on this form is needed to determine if your household is eligible to participate under a Texas Department of Housing and Community Affairs's (TDHCA) Affordable Housing Program. Please complete this entire form and leave no blanks.  
If there are any questions that you do not understand, please contact the Contract Administrator, Owner or Management Office Personnel. We thank you in advance for your cooperation.

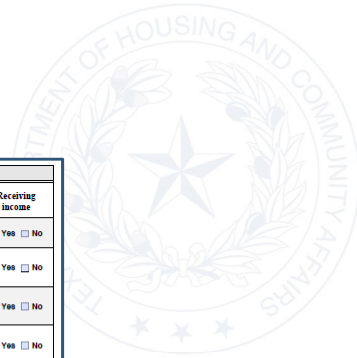
I. THIS SECTION TO BE COMPLETED BY ADMINISTRATOR/OWNER/MANAGEMENT	
Administrator/Owner/Management Name:	IDHCA Number:
Contact Name:	Contact Title:
Address:	Phone:
Email Address:	Fax:

II. THIS SECTION TO BE COMPLETED BY APPLICANT	
<b>A. CONTACT INFORMATION</b>	
Street Address: <input type="checkbox"/> Rent <input type="checkbox"/> Own <small>(as shown on driver's license or government ID)</small>	Apt #:
City/State/Zip:	County:
Current Address: <input type="checkbox"/> Rent <input type="checkbox"/> Own <small>(if different from above)</small>	Apt #:
City/State/Zip:	County:
Email Address:	Home Phone: ( )
Emergency Contact Name:	Mobile Phone: ( )
	Phone: ( )
<b>B. PREVIOUS RESIDENCY INFORMATION</b>	
Previous Address/City/State: <input type="checkbox"/> Rent <input type="checkbox"/> Own	Cost per Month:
Reason For Leaving:	Occupied For: ___ Yrs ___ Mos
Contact/Landlord Name:	Phone:



## Intake Application – Student Questions



**C. HOUSEHOLD COMPOSITION – List the Head of Household and all other persons who comprise the household**

Full Name (exactly as on driver's license or other govt. document)	Relationship to Head of HH	Date of Birth	Gender	Student Status F/T=Full Time P/T=Part Time	Social Security No./ Alien Registration No.	Receiving income
1	<input type="checkbox"/> Head of Household <input type="checkbox"/> Co-Head <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent <input type="checkbox"/> Other Adult		<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> FIT <input type="checkbox"/> PIT <input type="checkbox"/> N/A		<input type="checkbox"/> Yes <input type="checkbox"/> No
2	<input type="checkbox"/> Co-Head <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent <input type="checkbox"/> Other Adult		<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> FIT <input type="checkbox"/> PIT <input type="checkbox"/> N/A		<input type="checkbox"/> Yes <input type="checkbox"/> No
3	<input type="checkbox"/> Co-Head <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent <input type="checkbox"/> Other Adult		<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> FIT <input type="checkbox"/> PIT <input type="checkbox"/> N/A		<input type="checkbox"/> Yes <input type="checkbox"/> No
4	<input type="checkbox"/> Co-Head <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent <input type="checkbox"/> Other Adult		<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> FIT <input type="checkbox"/> PIT <input type="checkbox"/> N/A		<input type="checkbox"/> Yes <input type="checkbox"/> No
5	<input type="checkbox"/> Co-Head <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent <input type="checkbox"/> Other Adult		<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> FIT <input type="checkbox"/> PIT <input type="checkbox"/> N/A		<input type="checkbox"/> Yes <input type="checkbox"/> No
6	<input type="checkbox"/> Co-Head <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent <input type="checkbox"/> Other Adult		<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> FIT <input type="checkbox"/> PIT <input type="checkbox"/> N/A		<input type="checkbox"/> Yes <input type="checkbox"/> No
7	<input type="checkbox"/> Co-Head <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent <input type="checkbox"/> Other Adult		<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> FIT <input type="checkbox"/> PIT <input type="checkbox"/> N/A		<input type="checkbox"/> Yes <input type="checkbox"/> No
8	<input type="checkbox"/> Co-Head <input type="checkbox"/> Spouse <input type="checkbox"/> Dependent <input type="checkbox"/> Other Adult		<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> FIT <input type="checkbox"/> PIT <input type="checkbox"/> N/A		<input type="checkbox"/> Yes <input type="checkbox"/> No

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## Intake Application – Student Questions



**D. HOUSEHOLD COMPOSITION INFORMATION**

Were any of the household members a full-time student within the last calendar year?  NO  YES, who? \_\_\_\_\_

Are any of the household members listed above foster children?  NO  YES, who? \_\_\_\_\_

Are any of the household members listed above a live-in attendant?  NO  YES, who? \_\_\_\_\_

Are any household members temporarily absent from the home?  NO  YES, who? \_\_\_\_\_

Indicate reason for temporary absence: \_\_\_\_\_

Do you anticipate any other members will join your household within the next 12 months?  NO  YES

If yes, explain: \_\_\_\_\_

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**E. VETERAN INFORMATION**

Are any of the household members a Veteran?  NO  YES, who? \_\_\_\_\_

\*\*\* Important Information for Former Military Services Members. Women and men who served in any branch of the United States Armed Forces, including Army, Navy, Marines, Coast Guard, Reserves or National Guard, may be eligible for additional benefits and services. For more information please visit the Texas Veterans Portal at <https://veterans.portal.texas.gov/>

## Student Eligibility HAS NOT Changed

Student Eligibility is program based. The eligibility requirements for students in the program units has not been changed. You must ensure that the student eligibility for the household has been met.

All student household members must be evaluated for student financial aid as we will discuss in this webinar.

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## Student Eligibility: HTC/BOND/TCEP/TCAP Programs

Circle A, B or C as applicable (Note: Students include those attending public or private elementary schools, middle or junior high schools, senior high schools, colleges, universities, technical, trade or mechanical schools, but does not include those attending on-the-job training courses). Also, a student is defined as someone who attends school full-time for any part of five or more months in a calendar year (months need not be consecutive):

- A. Household contains at least one occupant who is not a student, has not been a student, and will not be during the current and/or upcoming calendar year. If this item is checked, no further information is needed.
- B. Household contains all students, but is qualified because the following occupant(s): \_\_\_\_\_ is/are part-time student(s). Provide documentation of part-time student status for at least one member of the household.
- C. Household contains all full-time students for five or more months during the current and/or upcoming calendar year (months need not be consecutive). If this item is selected, questions 1-5, below must be completed.

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## Student Eligibility: HTC/BOND/TCEP/TCAP Programs

C. Household contains all full-time students for five or more months during the current and/or upcoming calendar year (months need not be consecutive). If this item is selected, questions 1-5, below must be completed.

1.	Is at least one student receiving assistance under title IV of the Social Security Act (for example, payments under AFDC)?	Yes	No
2.	Was at least one student previously under the care and placement of the state agency responsible for administering foster care? (provide documentation of participation)	Yes	No
3.	Does at least one student participate in a program receiving assistance under the Job Training Partnership Act (JTPA), Workforce Investment Act or under other similar federal, state or local laws? (attach documentation of participation)	Yes	No
4.	Is at least one student a single parent with child(ren) and this parent is not a dependent of another individual and the child(ren) is/are not dependent(s) of someone other than a parent?	Yes	No
5.	Are the students married and entitled to file a joint tax return?	Yes	No

Households composed entirely of full-time students that are income eligible and satisfy one or more of the above conditions are considered eligible. If questions 1-5 are marked NO, or verification does not support the exception indicated, the household is considered an ineligible student household.

Under penalties of perjury, I/we certify that the information presented in this Annual Student Certification is true and accurate to the best of my/our knowledge and belief. I/we agree to notify management immediately of any changes in this household's student status. The undersigned further understands that providing false representations herein constitutes an act of fraud. False, misleading, or incomplete information may result in the termination of the lease agreement.

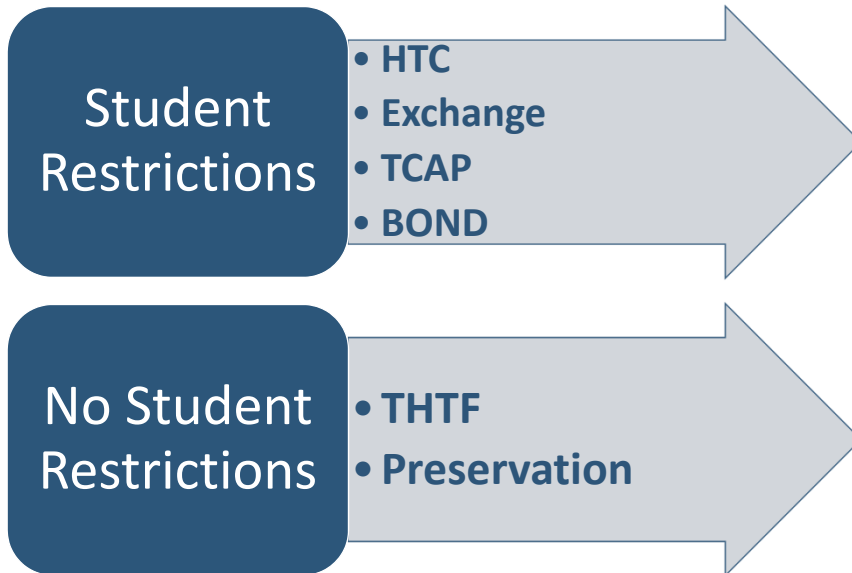
\_\_\_\_\_  
Signature of Applicant/Tenant

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Date

\_\_\_\_\_  
Signature of Applicant/Tenant

\_\_\_\_\_  
Date

## Student Eligibility: Student Restrictions by Program



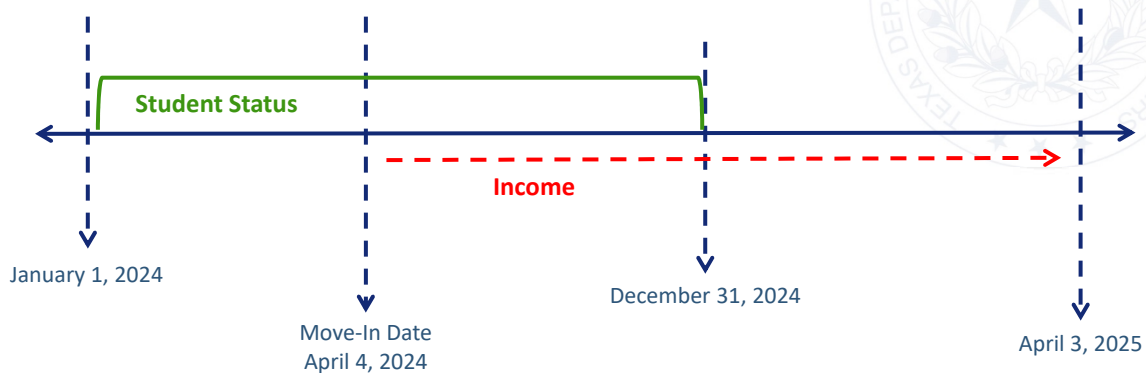
## Student Eligibility: HTC/BOND/TCEP/TCAP continued

- All household members must be screened for student status:
  - Kindergarten through 12<sup>th</sup> grade
  - Higher Education
- Full-Time (FT) Status
  - As defined by the educational institution
  - 5 calendar months, months enrolled do not have to be consecutive



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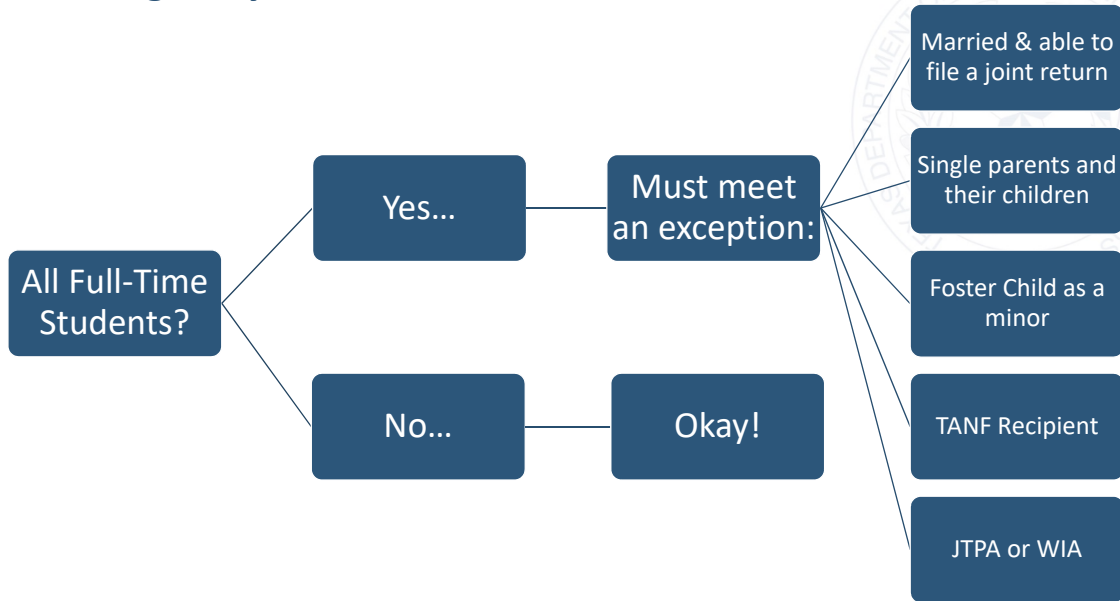
## Student Status Screening vs. Income Screening



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## Student Eligibility: HTC/BOND/TCEP/TCAP Flowchart



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## Student Eligibility: HTC/BOND/TCEP/TCAP Learning Point 1

Nicole, age 33, is applying for a unit with her son Joseph, age 8. She is attending community college full-time to finish her degree. She is divorced; per the court order her ex-husband is allowed to claim Joseph on his tax return. **Does the applicant household meet the student status requirements?**

- A No, Nicole does not claim her son on her taxes
- B Yes, Nicole is a single parent & her child is claimed by a parent on their tax return
- C Yes, Nicole attends community college and this is exempt
- D Yes, Nicole is over the age of 23 so her student status is irrelevant

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### Student Eligibility: HTC/BOND/TCEP/TCAP Learning Point 2

Dawn, age 53, is applying for a unit with her son Bryan, age 29, and her grandson Vince, age 8 and a full-time student. Dawn and Bryan are attending community college full-time. Dawn claims Vince on her tax return. **Does the applicant household meet the student status requirements?**

- A** No, the whole household is made up of full-time students with no exception met
- B** Yes, Bryan is single & Vince is claimed on Dawn's tax return
- C** Yes, Dawn and Bryan attend community college which is exempt
- D** Yes, Dawn and Bryan are over the age of 23 so their student status is irrelevant

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### Student Eligibility: HTC/BOND/TCEP/TCAP Learning Point 3

Charles and Mike are roommates, both age 23, and are applying for an HTC apartment in April. Charles is working on his Master's Degree and Mike has confirmed that he will graduate in May. The university has confirmed the full-time status for each applicant. **Does the applicant household meet the student status requirements?**

- A** Yes, Charles is working on his Master's, which is an exception
- B** Yes, Mike is graduating a month after they move-in
- C** No, Charles and Mike are both FT students and no exceptions are met
- D** No, But they can re-apply in June, after Mike graduates and be okay

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## Student Eligibility: HTC/BOND/TCEP/TCAP Learning Point 4

Amy, age 40, is a part-time student at an online college. She has been attending part-time for the last 2 years. She is applying for an apartment.  
**Does Amy qualify as eligible under the student status requirements?**

- A** Yes, Amy is only part-time
- B** Yes, Amy is an independent student
- C** No, Amy does not meet an exception
- D** No, she might decide to be full-time and we cannot take that chance

## Student Eligibility: HOME/TCAP-RF/HOME-ARP

TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS  
 HOME/TCAP RF PROGRAM- CERTIFICATION OF STUDENT ELIGIBILITY  
 To be completed for EACH Household Member the age of 18 and under the age of 24

A student is defined as an individual enrolled, part-time or full-time, at an institution of higher education as defined under the Higher Education Act of 1965 (20 U.S.C. 1001 and 1002) to obtain a degree, certificate, or other recognized educational credential.

Owners of developments with HOME/TCAP RF funds are required to screen and document student status for each individual(s) the age of 18 and under the age of 24. If an individual(s) is enrolled in an institution of higher education, each individual must meet student eligibility requirements in accordance with 24 CFR 5.612 and the HOME Final Rule.

Applicant/Resident Name:

**PART A: STUDENT STATUS**

Are you enrolled or planning to enroll in an institution of higher education? Circle One:  
Yes No

*If you answered "No," STOP and proceed to the signature line on page 3 of this form. Do not complete the rest of the form.*

**PART B: ELIGIBLE STUDENTS**

Are you a dependent of this household (e.g. you live with your parent(s)/legal guardian in this unit)? Circle One:  
Yes No

*If you answered "Yes," STOP and proceed to the signature line on page 2 of this form. Do not complete the rest of the form.*

## Student Eligibility: HOME/TCAP-RF/HOME-ARP



### PART C: INDEPENDENT STUDENTS

**Part 1-** To evidence independence from your parent(s)/legal guardian, each of the following three (3) criteria must be met **AND** you must submit a signed certification documenting if (and how much) financial assistance your parent(s)/legal guardian give you.

- |   | <b>Circle One:</b> |    |
|---|--------------------|----|
|   | Yes                | No |
| 1. Are you of legal contract age under Texas State law?   |                    |    |
| 2. Have you established a separate household from your parent(s)/legal guardian for no less than one (1) year from today? |                    |    |
| 3. Did your parent(s)/legal guardian claim you on their last tax return as a dependent?                                   |                    |    |

*If you answered "Yes" to # 1 and #2 and "No" to #3, **STOP** and proceed to the signature line on page 2. You are required to provide supporting documentation. Otherwise, proceed to Part 2.*

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## Student Eligibility: HOME/TCAP-RF/HOME-ARP



**Part 2-** To evidence independence from your parent(s)/legal guardian, one (1) of the below exceptions under the U.S. department of Education's definition of an independent student must be met:

- |   | <b>Circle One:</b> |    |
|---|--------------------|----|
|   | Yes                | No |
| • Will you be at least 24 years old by December 31 <sup>st</sup> of the current year?                                 |                    |    |
| • Are you legally married?  |                    |    |
| • Are you working on a master's or doctorate degree program (such as M.A., M.B.A, Ph.D., graduate certificate, etc.)? |                    |    |
| • Are you currently serving on active duty in the U.S. armed forces for purposes other than training?                 |                    |    |

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## Student Eligibility: HOME/TCAP-RF/HOME-ARP

- |   |     |    |
|---|-----|----|
| • Are you a veteran of the U.S. armed forces?   | Yes | No |
| • Do you have a legal dependent(s) (i.e. child or parent)?  | Yes | No |
| • At any time since you turned 13 years old, were you:  |     |    |
| ➢ An orphan?  | Yes | No |
| ➢ In Foster Care?   | Yes | No |
| ➢ A dependent/ward of the court?  | Yes | No |
| • Prior to turning 18, were you an emancipated minor?   | Yes | No |
| • Prior to turning 18, were you in legal guardianship?  | Yes | No |
| • Are you homeless, or self-supporting and at risk of being homeless?   | Yes | No |
| Please identify who could verify that you qualify as such:  |     |    |
| ➢ Your high school or district homeless liaison   | Yes | No |
| ➢ The director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development ("HUD") | Yes | No |
| ➢ The director of a runaway or homeless youth basic center or transitional living program   | Yes | No |

*If you answered "Yes" to any of the above questions, proceed to the signature line below. You are required to provide supporting documentation.*

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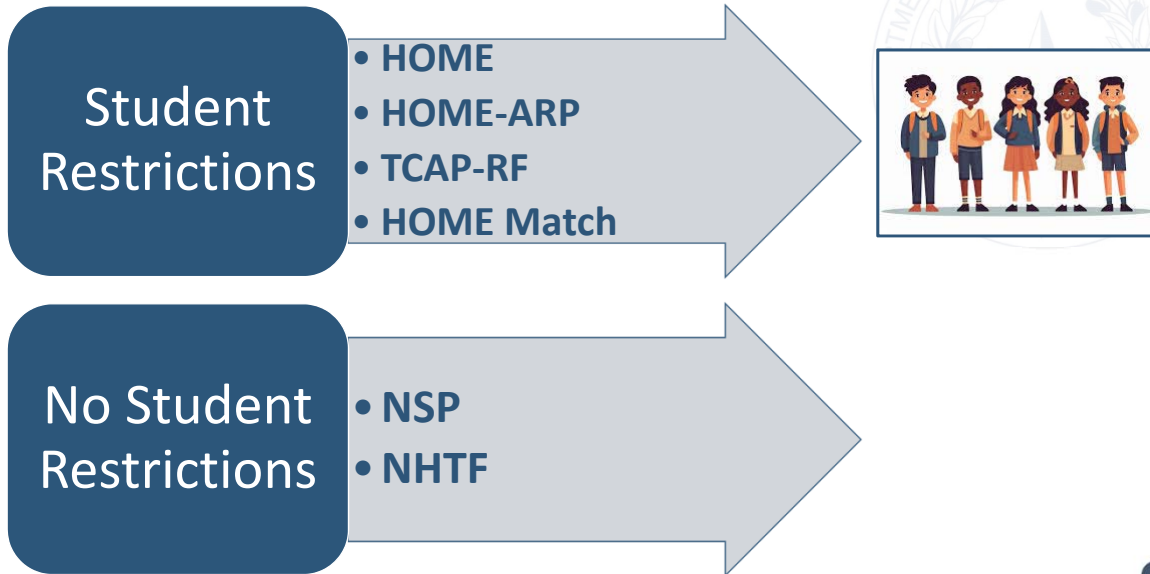
## Student Eligibility: HOME/TCAP-RF/HOME-ARP

- |   |     |    |
|---|-----|----|
| • Are you a veteran of the U.S. armed forces?   | Yes | No |
| • Do you have a legal dependent(s) (i.e. child or parent)?  | Yes | No |
| • At any time since you turned 13 years old, were you:  |     |    |
| ➢ An orphan?  | Yes | No |
| ➢ In Foster Care?   | Yes | No |
| ➢ A dependent/ward of the court?  | Yes | No |
| • Prior to turning 18, were you an emancipated minor?   | Yes | No |
| • Prior to turning 18, were you in legal guardianship?  | Yes | No |
| • Are you homeless, or self-supporting and at risk of being homeless?   | Yes | No |
| Please identify who could verify that you qualify as such:  |     |    |
| ➢ Your high school or district homeless liaison   | Yes | No |
| ➢ The director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development ("HUD") | Yes | No |
| ➢ The director of a runaway or homeless youth basic center or transitional living program   | Yes | No |

*If you answered "Yes" to any of the above questions, proceed to the signature line below. You are required to provide supporting documentation.*

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## Student Eligibility: MFDL Student Restrictions by Program



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## Student Eligibility: MFDL Restrictions

- §92.2
  - An **individual** does not qualify as a low-income or very low-income family if the individual is a student who is not eligible to receive Section 8 assistance under 24 CFR 5.612
    - Treated the same regardless if it is a one (1) person household or the individual is part of a larger household
    - The individual would make the larger household ineligible
- Existing households are not “grandfathered in” and must be screened for student status during recertification
- If a HOME/HOME-ARP/TCAP-RF assisted unit is occupied by an ineligible student household, then the over-income household rules will apply

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## Student Eligibility: MFDL Eligibility Flowchart

Are you 18 to 23 years old?

- No – Eligible
- Yes – Continue...

Are you a student?

- No – Eligible
- Yes – Continue...

**Must also provide a signed certification from parent(s) or legal guardian if and how much financial assistance is provided.**

Do you live with parent/guardian?

- Yes – Eligible
- No – Must prove eligibility

To evidence independence from your parent(s)/legal guardian, each of the following must be met

- Must be of legal contract age under Texas State law
- Must have established a separate household from parent(s)/legal guardian for no less than one year
- Must NOT be claimed on parent(s)/legal guardian on their last tax return as a dependent

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## Student Eligibility: MFDL Independent Student Requirements

If independence from your parent(s)/legal guardian cannot be established, one of the following exceptions **MUST** be met to qualify:

- Be at least 24 years old by December 31st of the current year
- Be legally married
- Be working on a master's or doctorate degree program (such as M.A., M.B.A, Ph.D., graduate certificate, etc.)
- Currently serving on active duty in the U.S. armed forces for purposes other than training
- Be a veteran of the U.S. armed forces
- Have a legal dependent(s) (i.e. child or parent)
- At any time since turning 13 been an orphan, in Foster Care, or a dependent/ward of the court
- Be an emancipated minor prior to turning 18, or in legal guardianship
- Homeless, or self-supporting and at risk of being homeless

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## Student Eligibility: MFDL Dependent Students

Individual 18-23 who is a student

Not a dependent of the household occupying the unit

Cannot evidence independence from parent(s)/legal guardian

Does not meet one of the Independent Student exceptions

Is considered a Dependent Student

### Dependent Student:

- Qualify the student as income eligible for the HOME/TCAP-RF/HOME-ARP/HOME Match Unit, and
- Qualify the parents as income eligible for the HOME/TCAP-RF/HOME-ARP/HOME Match Unit

If the parents are not income eligible:

- The student is not eligible for the HOME/HOME-RP/TCAP-RF/HOME Match Unit

If the parents refuse to provide documentation of income :

- The student is not eligible for the HOME/TCAP-RF/HOME-ARP/HOME Match Unit

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## Student Eligibility: MFDL Learning Point 1

Peter is 22 years old and applies for a HOME assisted unit. He is attending college full-time and was recently discharged from the armed forces. He is moving out of his parent's house.

**Does Peter met the MFDL student eligibility requirements?**

- A** Peter qualifies since they are also working
- B** Peter lives with his parents and does not qualify
- C** Peter is a veteran of the US Armed Forces and meets the MFDL student requirements

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### Student Eligibility: MFDL Learning Point 2

Domanik is 21 years old and a single parent. She has a 1 year old child. Domanik is a full-time student at the local university and receives TANF payments. She is also receiving Social Security payments for her child. Domanik is moving out of her parent's house, but her parents are not income eligible under the HOME program.

**Does the applicant meet the MFDL student eligibility requirements?**

- A Yes, the household receives TANF
- B No, most likely they are still being claimed on their parent's tax returns
- C No, her parents are not income eligible
- D Yes, because she has a dependent

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### Student Eligibility: MFDL Learning Point 3

Julie, age 20, and Jeanna, age 21, are roommates. They have applied for a TCAP-RF assisted unit but are both part-time students. They are both dependents on their parents' tax returns and receive income from their parents. Neither set of parents are income eligible under the program requirements.

**Do the roommates meet the student eligibility requirements?**

- A Yes, they are both part-time
- B No, they are still being claimed on their parent's tax returns
- C No, their parents are not income eligible
- D Both B and C

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### Student Eligibility: MFDL Learning Point 4

Virginia, Jim and Carolyn have applied for a 3-bedroom HOME assisted unit. Virginia and Jim are both 21, married and full-time students. Carolyn, their roommate, is 20 years old, attends the university part-time and works at the local dry-cleaners. The applicants meet the student eligibility requirement, **true or false?**

- A True
- B False

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### Student Eligibility: MFDL Learning Point 5

Manuel is 19 years old and applying for an NHTF unit. He is a full-time student at the local university studying to be an engineer. He is a dependent of his parents and they provide him monthly monetary contributions. Manuel also works part-time at an engineering firm.

**Does the applicant meet the student eligibility requirements?**

- A Yes, He is an independent student
- B N/A, NHTF does not have student restrictions

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### Student Eligibility: MFDL Learning Point 6

Esther, age 50, and her 20 year old daughter, Samantha, are applying for a HOME assisted unit. Samantha is Esther's dependent and a full-time student. Samantha also works part-time at HEB and Esther is receiving worker's compensation.

**Does the applicant household meet the student eligibility requirements?**

- A** Yes, Samantha is living with a parent and is a dependent of the household
- B** No, Samantha is only 20 and is a full-time student
- C** Yes, Esther is 50 and the entire household is not full-time students
- D** No, Esther is receiving worker's compensation and is not employed

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### Student Eligibility: MFDL Learning Point 9

Walker is 45 years old, single and applying for a HOME assisted unit. They have decided on a career change and quit their job to go back to college. They are full-time and studying to be a nurse. They recently went through a divorce. The applicant meets the student eligibility requirements, **true or false?**

- A** True
- B** False

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### Student Eligibility: MFDL Learning Point 10

Josie is 19 years old and came out of the foster care program when she turned 18. She is a full-time student at the local college and also works part-time at Target. She is not a dependent of anyone but is in a serious relationship. She is moving into the HOME unit by herself.

**Does the applicant meet the student eligibility requirements?**

- A Yes, Josie meets the requirement under the definition of Independent Student
- B Yes, being in Foster Care after the age of 13 is one of the student criteria
- C Neither of these
- D Both A and B

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### Student Eligibility: MFDL Learning Point 12

Jasmine is 18 and attending college full-time. They have been self-supporting since they were 16 and were previously experiencing homelessness. They are currently in a great transitional housing program funded by HUD and are seeking permanent housing. They want to lease a TCAP-RF unit. Do they meet the student eligibility requirements, **yes or no?**

- A Yes
- B No

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## Student Eligibility: Section 811 Program

- During the application process, onsite staff should determine if each adult household member is student eligible
- If an adult is a student, part- or full-time, the student must meet ALL of the following criteria to be eligible
  - Be of legal contract age under state law
  - Either:
    - Has established a household separate from parents or legal guardians for at least one year prior to application for occupancy OR
    - Meet the U.S. Department of Education's definition of an independent student
  - Not be claimed as a dependent by parents or legal guardians pursuant to IRS regulations and
  - Obtain a certification of the amount of financial assistance that will be provided by parents, signed by the individual providing the support. This certification is required even if no assistance will be provided.
- Please be advised that the applicant may need to comply with other programs requirements for students, such as the Housing Tax Credit program

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## Student Eligibility: Section 811 Program continued

U.S. Department of Education's definition of an Independent Student requires the individual to meet one or more of the following criteria:

Be at least 24 years old by December 31<sup>st</sup> of the current year

Be an orphan or a ward of the court anytime since 13 years of age, or an emancipated minor

Serving on active duty of U.S. Armed Forces

Have legal dependents other than spouse

Be a graduate or professional student

Married

Homeless or self-supporting at risk of being homeless

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## Student Eligibility: Student Verification

TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS  
STUDENT VERIFICATION

**THIS SECTION TO BE COMPLETED BY MANAGEMENT AND EXECUTED BY STUDENT**

This Student Verification is being delivered in connection with the undersigned's eligibility for residency in the following apartment:

Property Name: \_\_\_\_\_

I hereby grant disclosure of the information requested below from \_\_\_\_\_

Name of Educational Institution  
\_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Printed Name \_\_\_\_\_ Student ID# \_\_\_\_\_

Return Form to: \_\_\_\_\_



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## Student Eligibility: Student Verification

**THIS SECTION TO BE COMPLETED BY EDUCATIONAL INSTITUTION**

The above-named individual has applied for residency or is currently residing in housing that requires verification of student status. Please provide the information requested below:

Is the above-named individual a student at this educational institution?  YES  NO \_\_\_\_\_

If no, please list the last month and year the above-named individual was a student at this educational institution: \_\_\_\_\_

If yes, please indicate this student's full-time (FT) or part-time (PT) status for each month of the current *calendar* year of \_\_\_\_\_  
(Please circle)

January	FT	PT	N/A	July	FT	PT	N/A
February	FT	PT	N/A	August	FT	PT	N/A
March	FT	PT	N/A	September	FT	PT	N/A
April	FT	PT	N/A	October	FT	PT	N/A
May	FT	PT	N/A	November	FT	PT	N/A
June	FT	PT	N/A	December	FT	PT	N/A

I hereby certify that the information supplied in this section is true and complete to the best of my knowledge.

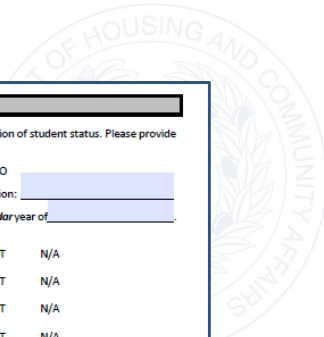
Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print your name: \_\_\_\_\_ Tel.#: \_\_\_\_\_

Title: \_\_\_\_\_

Educational Institution: \_\_\_\_\_

PENALTIES FOR MISUSING THIS CONTENT: Title 18, Section 1001 of the U.S. Code states that a person is guilty of a felony for knowingly and willingly making false or fraudulent statements to any department of the United States Government. HUD and any owner (or any employee of HUD or the owner) may be subject to penalties for unauthorized disclosures or improper uses of information collected based on the consent form. Use of the information collected based on this verification form is restricted to the purposes cited above. Any person who knowingly or willingly requests, obtains, or discloses any information under false pretenses concerning an applicant or participant may be subject to a misdemeanor and fined not more than \$5,000. Any applicant or participant affected by negligent disclosure of information may bring civil action for damages and seek other relief, as may be appropriate, against the officer or employee of HUD or the owner responsible for the unauthorized disclosure or improper use. Penalty provisions for misusing the social security number are contained in the Social Security Act at 208 (a) (6), (7), and (8). Violations of these provisions are cited as violations of 42 USC 408 (a), (6), (7), and (8).



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## Student Verification Completed

TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS  
STUDENT VERIFICATION

**THIS SECTION TO BE COMPLETED BY MANAGEMENT AND EXECUTED BY STUDENT**

This Student Verification is being delivered in connection with the undersigned's eligibility for residency in the following apartment:  
Property Name: Pandora Springs

I hereby grant disclosure of the information requested below from: Austin Community College

Jeremy Smith Name of Educational Institution  
Signature Date  
1/12/2024

Jeremy Smith Student ID#  
Printed Name 123-45-6666

Return Form to: Pandora Springs  
pandorasprings@polleimgmt.com  
Fax (512) 475-3900

**THIS SECTION TO BE COMPLETED BY EDUCATIONAL INSTITUTION**

The above named individual has applied for residency or is currently residing in housing that requires verification of student status. Please provide the information requested below.

Is the above named individual a student at this educational institution?  YES  NO

If no, please list the last month and year the above named individual was a student at this educational institution: \_\_\_\_\_

If yes, please indicate this student's full-time (FT) or part-time (PT) status for each month of the current calendar year of 2024  
(Please circle)

January	FT	PT	N/A	July	FT	PT	N/A
February	FT	PT	N/A	August	FT	PT	N/A
March	FT	PT	N/A	September	FT	PT	N/A
April	FT	PT	N/A	October	FT	PT	N/A
May	FT	PT	N/A	November	FT	PT	N/A
June	FT	PT	N/A	December	FT	PT	N/A

I hereby certify that the information supplied in this section is true and complete to the best of my knowledge.

Signature: Jasmine Harris Date: January 15, 2024  
Print your name: Jasmine Harris Title: Registrar Agent  
Educational Institution: Austin Community College



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## Student Eligibility: Layered Programs Learning Point 1

Andrea, age 28, and her daughter Kara, age 6, are applying to live in a unit that is layered with HOME and Housing Tax Credit. They are both full-time students, Andrea attends the local university and Kara is in 1<sup>st</sup> grade. Andrea does not file taxes so she lets her mom claim Kara on her taxes.

**Does the applicant household meet the student eligibility requirements?**

- A** Yes, Andrea is 28 years old and meets the definition of independent student
- B** No, Kara is only 6 and elementary school does not count
- C** Yes, Andrea is Kara's parent and they reside in the same household
- D** No, Kara is not claimed on a parent's tax return, this is not an eligible household

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## Student Eligibility: Layered Programs Learning Point 2

Brad and Angelina are married and applying to live in a unit that is Housing Tax Credit and TCAP-RF layered. Angelina is pregnant with their first child. Brad and Angelina are both full-time students pursuing undergraduate degrees.

**Does the applicant household meet the student eligibility requirements?**

- A** No, they would need to be pursuing their Master's Degrees
- B** Yes, they are married and able to file a joint tax return
- C** Yes, Angelina is pregnant and the unborn child does not count towards the household
- D** Yes, neither Brad nor Angelina are claimed on their parent's tax returns

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## Student Eligibility: Layered Programs Learning Point 3

Ben and Jennifer are dating and decide they want to live together. They apply for an apartment that is layered with Housing Tax Credit and Texas Housing Trust Fund. Ben is a full-time student working on his master's degree. Jennifer is not a student but works full-time.

**Does the applicant household meet the student eligibility requirements?**

- A** Yes, Jennifer is not a student so the household is exempt
- B** Yes, Texas Housing Trust Fund does not have student restrictions
- C** No, Ben and Jennifer are not married and filing taxes together
- D** Yes, both A and B are correct

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## Student Earned Income

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### Student Income: Excluded Income Sources

- Insurance Payments and Settlements
- **Employment Income for Students**
- Payments to keep family members with disabilities living at home
- Payments from the U.S. Census Bureau for work on Decennial Census
- Direct Federal/State Payments for Economic Stimulus or Recovery
- Tax Returns\*\*
- Gifts for holiday, birthdays, or other significant life events
- Lump sum additions to assets like lottery winnings
- Civil Settlements from an action that caused someone to become disabled
- Income or lump sums received from Civil Rights Settlements
- Back-pay received as a result of a Civil Rights Action
- Worker's Compensation
- Income received from a retirement account
  - Except for periodic payments
- **Certain Student Financial Assistance**
- Any other income excluded by CFR 5.609

Any of the Lump Sums outlined on this slide that are placed in an asset, except Tax Returns, will count towards the household assets.

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## Student Income: Special Circumstances

Earned  
Income

Financial  
Aid



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## Student Income : Full-Time Student - Earned Income

- If 18 years of age or older; count only a small amount of the student's earned income – a maximum of \$480 per year (to be examined and adjusted annually by HUD) if:
  - The student is not the Head of Household, Spouse or Co-Head
  - The student is a dependent of the household
- Student Status must be verified with the educational institution
  - Verified by the Registrar's Office
    - If the Registrar's Office will not verify you will use the Student Clearinghouse to verify
  - Full-time student status is determined by the educational institution or technical school
- All income verifications (paystubs, reports, etc.) must be gathered

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### Student Earned Income: Learning Point 1

Kathie applies with her 19 year old daughter, Kelsey. Kelsey works part-time at Kura Sushi making \$6,230 a year.

**True or false;** only \$480 of Kelsey's income should be included in the calculation of income for eligibility?

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### Student Earned Income: Learning Point 2

William applies with his parents; he is a full-time student at the local college. William receives Social Security in the amount of \$804 per month.

**True or false;** only \$480 of William's income should be included in the calculation of income for eligibility?

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### Student Earned Income: Learning Point 3

Trey applies with their 16 year old child, Tayler, who is a full-time student. Tayler works part-time at Best Buy making \$4,530 a year.

**True or false;** only \$480 of Tayler's income should be included in the calculation of income for eligibility?

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### Student Earned Income: Learning Point 4

Trishia applies with her spouse. Trishia is a full-time student at the local college. Trishia receives earned income in the amount of \$36,000 annually.

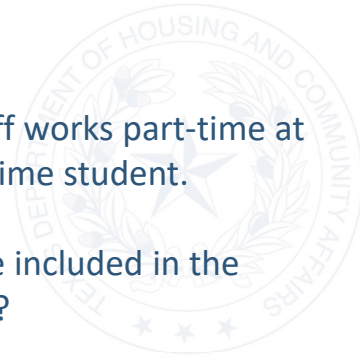
**True or false;** only \$480 of Trishia's income should be included in the calculation of income for eligibility?

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## Student Earned Income: Learning Point 5

Patty applies with her 19 year old foster adult, Jeff. Jeff works part-time at Applebee's making \$6,230 a year and is a full-time student.

**True or false;** only \$480 of Jeff's income should be included in the calculation of income for eligibility?



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## Student Financial Aid



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## Student Income: Financial Assistance Under Title IV of HEA

Federal Pell Grants	Federal early outreach and student services programs	Federal supplemental educational opportunity grants	Leveraging educational assistance partnership program
Special programs for students whose families are engaged in migrant/ seasonal farm-work	Robert C. Byrd honors scholarship program	Child care access means parents in school	Federal Family Education Loan Programs
Federal Work-Study Programs	William D. Ford Federal Direct Loan Program	Federal Perkins Loans	Higher Education Relief Opportunities for Students

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## Student Income: Other Financial Assistance

**Other student financial assistance includes grants or scholarships received from the following sources:**

- The Federal government;
- A state (including U.S. territories), Tribe, or local government;
- A private foundation registered as a nonprofit under 26 U.S.C. 501(c)(3);
- A business entity (such as a corporation, general partnership, limited liability company, limited partnership, joint venture, business trust, public benefit corporation, or nonprofit entity); or
- An institution of higher education.

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## Student Income: Financial Aid, Included or Excluded

### Included

- Only count amount received in excess of tuition, **books & supplies**, fees and **room & board** charges
- Obtain documentation to support the amount of tuition, books, supplies, fees and room & board charges

### Excluded

- Applies to all student financial assistance received under Title IV of the Higher Education Act (HEA) in excess of educational expenses

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## Student Income: Financial Aid

If the household contains a student:

- **All assistance provided through Title IV HEA must be excluded from income**
  - If there is an excess of aid after applying the assistance to the educational expenses
- **All other assistance should be evaluated for inclusion in household income**

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## Student Financial Aid: Learning Point 1

### Calculation of Income from Student Financial Assistance

Qualified Education Expenses:	\$12,850
Title IV HEA Assistance:	\$14,590
Other Financial Assistance:	\$5,000
Total of Financial Assistance:	\$19,590

**How much total financial assistance would be used to reduce expenses?**

**How much should count as regular income?**

*All assistance provided through Title IV HEA must be excluded from income. This exclusion must be taken into account first. Anything remaining after deducting the qualified expenses is not considered income. Had a balance been left, the other financial assistance would have been applied and anything leftover would be counted as income.*

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## Student Financial Aid: Learning Point 2

### Calculation of Income from Student Financial Assistance

Qualified Education Expenses:	\$18,000
Title IV HEA Assistance:	\$14,590
Other Financial Assistance:	\$5,000
Total of Financial Assistance:	\$19,590

**How much total financial assistance would be used to reduce expenses?**

**How much should count as regular income?**

*All assistance provided through Title IV HEA must be excluded from income. This exclusion must be taken into account first. Anything remaining after deducting the qualified expenses is not considered income. Since a balance was left, the other financial assistance has been applied and anything leftover will be counted as income.*

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## Student Financial Aid: Learning Point 3

### Calculation of Income from Student Financial Assistance

Qualified Education Expenses: \$18,000  
 Scholarship from a local entity: \$8,000  
 Persons outside the household: \$25,000  
 Total of Financial Assistance: \$33,000

- Other student financial assistance does not include:
- Financial support provided to the student in the form of a fee for services performed (e.g., a work study or teaching fellowship that is not excluded under section 479B of the Higher Education Act HEA); or
  - Gifts, including gifts from family or friends.

How much total financial assistance would be used to reduce expenses?

How much should count as regular income?

*All assistance provided through Title IV HEA must be excluded from income. This exclusion must be taken into account first. Anything remaining after deducting the qualified expenses is not considered income. Since a balance (the gift) was left, the financial assistance has been applied and anything additional will be counted as income.*

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## Student Financial Aid: Learning Point 4

**STUDENT FINANCIAL ASSISTANCE VERIFICATION**

Applicant/Resident: \_\_\_\_\_ Social Security No. (last 4 digits): \_\_\_\_\_  
 To Whom It May Concern:

The individual named directly above is an applicant/tenant of a housing program that requires verification of income. The information provided will remain confidential for satisfaction of the stated purpose only. Your prompt response is crucial and greatly appreciated.

By signing below, I authorize the release of this information.

Participant's Signature: \_\_\_\_\_ Date: 02/16/2024

1.) Actual Covered Costs: \$ 8,805.26 per semester / quarter / year / other Summer (circle one) *not including*  
 Cost of tuition, books, supplies, equipment to support students with a learning disability, room and board, other fees required and charged to a student by the educational institution.

2.) Higher Education Act (HEA) Assistance: \$ 554.00 per semester / quarter / year / other Summer (circle one) *not including*  
 Including Federal Pell Grants, Teach Grants, Federal Work Study Programs, Federal Perkins loans, Student Financial Assistance through Bureau of Indian Education, Higher Education Tribal Grants, Tribally Controlled Colleges or University Grant Programs, Employment training program under Section 134 of Workforce Innovation and Opportunity Act (WIOA)

3.) Other Student Financial Assistance: \$ 605.00 per semester / quarter / year / other Summer (circle one) *not including*  
 Including other grants or scholarships received from a federal, state, territory, tribal, or local government, 501 (c)(3) private foundation, a business entity, or an institution of higher education.  
 Do not include any financial assistance from family or friends.

I hereby certify that the statements above are true and correct to the best of my knowledge.

Signature: \_\_\_\_\_ Printed Name: \_\_\_\_\_  
 Title: Counselor I The University  
 Date: February 23<sup>rd</sup>, 2024  
 Telephone Number: \_\_\_\_\_

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

Please verify the above information and email, mail, or fax to: \_\_\_\_\_

Total Qualified Educational Expenses:  
 \$8,805.26 Tuition and Fees  
 \$650 Books (confirmed by receipt)  
 = \$9,455.26 total

Title IV HEA Financial Assistance:

\$5,546

Other Financial Assistance:

\$5,605

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## Student Financial Aid: LP4 Calculations & Certification

### Calculation of Income from Student Financial Assistance

Qualified Education Expenses: \$8,805.26 tuition and fees + \$650 books = \$9,455.26  
 Title IV HEA Assistance: \$5,546  
 Other Financial Assistance: \$5,605  
 Total of Financial Assistance: \$11,151

**How much total financial assistance would be used to reduce expenses?**

**How much should count as regular income?**

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## Student Financial Aid: Learning Point 5

### Award Package By Aid Year 2023-2024 Financial Aid Year

General Information | Award Overview | Accept Award Offer

Print

#### Need Calculation

Cost of Attendance \$27,293.00  
 Estimated Family Contribution \$0.00  
 Initial Need \$27,293.00  
 Outside Resource \$0.00  
 Need \$14,793.00

#### Housing

Status  
 Off Campus

#### Financial Aid Award by Term for the 2023-2024 Financial Aid Year

Fund	Fall 2023		Spring 2024		Total
	Status	Amount	Status	Amount	
CAL Loan - HB 1403 Only Accepted	\$5,000.00	Accepted	\$5,000.00	Accepted	\$10,000.00
TPEG - HB 1403 Accepted	\$1,250.00	Accepted	\$1,250.00	Accepted	\$2,500.00
<b>Totals</b>		\$6,250.00		\$6,250.00	\$12,500.00

#### Cost of Attendance

Tuition \$6,941.00  
 Fees \$3,491.00  
 Books and Supplies \$800.00  
 Room \$6,705.00  
 Board \$3,744.00  
 Transportation \$3,524.00  
 Personal Expenses \$2,088.00  
**Total: \$27,293.00**

Total Qualified Educational Expenses:

\$6,941 Tuition  
 \$3,491 Fees  
 \$800 Books and Supplies  
 \$6,705 Room  
 \$3,744 Board  
~~\$3,524 Transportation~~  
~~\$2,088 Personal Expenses~~  
**\$21,681**

Title IV HEA Financial Assistance:

\$0

Other Financial Assistance:

\$2,500

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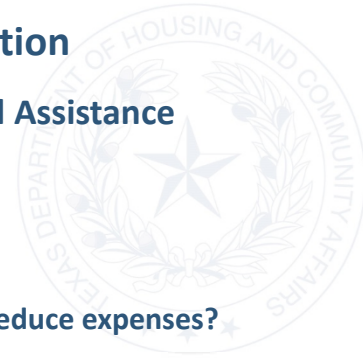
## Student Financial Aid: LP5 Calculations & Certification

### Calculation of Income from Student Financial Assistance

Qualified Education Expenses:	\$21,681
Title IV HEA Assistance:	\$0
Other Financial Assistance:	\$2,500
Total of Financial Assistance:	\$2,500

**How much total financial assistance would be used to reduce expenses?**

**How much should count as regular income?**



## Student Financial Aid: Learning Point 6

### Account Summary for 2024 Spring Term

2024 Spring As of Date 03/22/2024

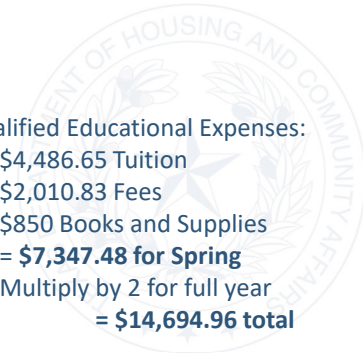
UNT Business Unit

Charges	Amount	
Tuition	4,486.65	USD
Mandatory Fees	1,681.03	USD
Course Fees	294.80	USD
Miscellaneous Fees	35.00	USD
<b>Total Charges:</b>	<b>6,497.48</b>	<b>USD</b>

Total Qualified Educational Expenses:  
 \$4,486.65 Tuition  
 \$2,010.83 Fees  
 \$850 Books and Supplies  
 = **\$7,347.48 for Spring**  
 Multiply by 2 for full year  
 = **\$14,694.96 total**

Financial Aid		
Date Posted	Item Description	Amount
01/06/2024	Texas Grant Continuing	-500.00 USD
01/09/2024	UNT Educational Grant	-1,250.00 USD
01/06/2024	Emerald Eagle Award Continuing	-500.00 USD
01/06/2024	UNT Excellence-N Texas AY23	-3,000.00 USD
01/06/2024	Fed Pell Grant	-3,697.00 USD
<b>Total Financial Aid:</b>		<b>-8,947.00 USD</b>

Title IV HEA Financial Assistance:  
 \$3,697 x 2 = **\$7,394 total**  
 Other Financial Assistance:  
 \$5,250 x 2 = **\$10,500 total**



## Student Financial Aid: LP6 Calculations & Certification

### Calculation of Income from Student Financial Assistance

Qualified Education Expenses:	\$14,694.96
Title IV HEA Assistance:	\$7,394.00
Other Financial Assistance:	\$10,500.00
Total of Financial Assistance:	\$17,894.00

**How much total financial assistance would be used to reduce expenses?**

**How much should count as regular income?**

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## Student Financial Aid: Example G10 from HUD Notice

### Example G10: Treatment of Student Financial Assistance in Non-Section 8 Programs

Juan is a full-time student, and he received the following grants and scholarships to cover his first year of college: Federal Pell Grant: \$25,000; University Scholarship: \$15,000; Rotary Club Scholarship: \$3,000.

Total assistance received under 479B of HEA: \$25,000 (Federal Pell Grant)	Juan's actual covered costs: \$28,000
Total other student financial assistance received: \$18,000	
Step 1: Determine amount of actual covered costs exceeding section 479B assistance. \$28,000 (actual covered costs) <b>minus</b> \$25,000 (total assistance received under 479B of HEA) <b>equals</b> \$3,000	Step 2: Determine amount of student financial assistance to include in income. \$18,000 (other student financial assistance received) <b>minus</b> \$3,000 (actual covered costs exceeding section 479B assistance) <b>equals</b> \$15,000 (if negative, then use \$0)
Amount of student financial assistance included in Juan's income: \$15,000	

<https://www.hud.gov/sites/dfiles/OCHCO/documents/2023-27pihn.pdf>

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## Student Financial Aid: Example G11 from HUD Notice

Example G11: Treatment of Student Financial Assistance in Non-Section 8 Programs	
<p>Sarah is a part-time student, and she received the following amounts to cover her first year of college: Federal Perkins Loan: \$2,000; Scholarship from Local Car Dealership: \$500; Gift from Aunt Lois: \$1,000.</p> <p>The \$1,000 is a gift from Aunt Lois, so it is not considered student financial assistance, and it is not considered in this calculation. Note: If Aunt Lois gives Sarah the \$1,000 gift as a one-time, lump-sum payment, it would be excluded from income under 24 CFR § 5.609(b)(24)(vii).</p>	
<p>Total assistance received under 479B of HEA: \$2,000 (Federal Perkins Loan)</p> <p>Total other student financial assistance received: \$500</p> <p>Total non-student financial assistance: \$1,000</p> <p>Total student financial assistance: \$2,500</p>	<p>Sarah's actual covered costs: \$3,000</p>
<p>Step 1: Determine amount of actual covered costs exceeding section 479B assistance.</p> <p>\$3,000 (actual covered costs) <b>minus</b> \$2,000 (total assistance received under 479B of HEA) <b>equals</b> \$1,000</p>	<p>Step 2: Determine amount of student financial assistance to include in income.</p> <p>\$500 (other student financial assistance received) <b>minus</b> \$1,000 (amount of actual covered costs exceeding section 479B assistance) <b>equals</b> -\$500 (if negative, then use \$0)</p>
<p>The amount of student financial assistance received by Sarah is less than her actual covered costs after deducting assistance received under 479B of the HEA and other student financial assistance received, therefore there is no student financial assistance to include in income.</p> <p>Amount of student financial assistance included in Sarah's income: \$0</p>	

<https://www.hud.gov/sites/dfiles/OCHCO/documents/2023-27pihn.pdf>

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## Student Financial Aid: Example G12 from HUD Notice

Example G12: Treatment of Student Financial Assistance in Non-Section 8 Programs	
<p>Dante is a full-time student, and he received the following amounts to cover his first year of college: Federal Pell Grant: \$9,000; Federal Perkins Loan: \$13,000; Local Library Scholarship: \$1,000.</p>	
<p>Total assistance received under 479B of HEA: \$22,000 (Federal Pell Grant plus Federal Perkins Loan)</p> <p>Total other student financial assistance received: \$1,000</p>	<p>Dante's actual covered costs: \$16,000</p>
<p>Step 1: Determine amount of actual covered costs exceeding section 479B assistance.</p> <p>\$16,000 (actual covered costs) <b>minus</b> \$22,000 (total assistance received under 479B of HEA) <b>equals</b> \$-6,000</p>	<p>Step 2: Determine amount of student financial assistance to include in income.</p> <p>Not necessary because Step 1 resulted in a negative amount, so all other student financial assistance would be included in Dante's income</p>
<p>Amount of student financial assistance included in Dante's income: \$1,000</p>	

<https://www.hud.gov/sites/dfiles/OCHCO/documents/2023-27pihn.pdf>

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## Other Student Requirements

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### Students: Annual Reporting Requirements

- During the Compliance Period, all Housing Tax Credit, TCAP, and Exchange developments, must collect and maintain current student status data for each low-income household.
  - This information must be collected within 120 days before the anniversary of the effective date of the original Income Certification and can be collected on the Department's Annual Eligibility Certification (AEC) or the Department's Certification of Student Eligibility form or the Department's Income Certification form.
  - Throughout the Compliance Period for HTC, TCAP, and Exchange developments, low-income households comprised entirely of full-time students must qualify for an HTC program exception, and supporting documentation must be maintained in the household's file.
  - For Bond Developments, if the household is not an eligible student household, it may be possible to re-designate the full-time student household to an Eligible Tenant (ET).
- For HOME, HOME Match, TCAP-RF, and HOME-ARP developments, an individual does not qualify as a low-income or very low-income family if the individual is a student who is not eligible to receive Section 8 assistance under 24 CFR §5.612.
- Throughout the Affordability Period for all Housing Tax Credit, TCAP, Exchange, Bond, HOME, HOME Match, TCAP-RF, and HOME-ARP developments must collect and maintain current student status data for each low-income household.

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## Students: Certifications

**INCOME CERTIFICATION**

Initial Certification  
  Recertification  
  Other\* \_\_\_\_\_

Effective Date: \_\_\_\_\_  
 Move-in Date: \_\_\_\_\_  
(MM/DD/YYYY)  
 \*Transfer from Unit: \_\_\_\_\_

---

**PART I – DEVELOPMENT DATA**

Property Name: \_\_\_\_\_

County: \_\_\_\_\_

BIN #: \_\_\_\_\_

Address: \_\_\_\_\_

Unit Number: \_\_\_\_\_

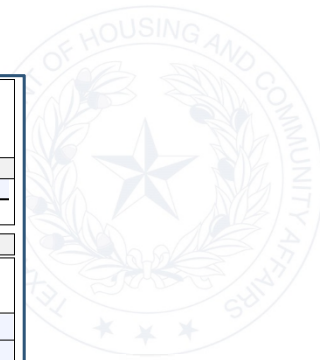
# Bedrooms: \_\_\_\_\_

CMTS # \_\_\_\_\_

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**PART II. HOUSEHOLD COMPOSITION**

HH Mbr #	Last Name	First Name & Middle Initial	Relationship to Head of Household	Date of Birth (MM/DD/YYYY)	Student Status <i>(circle one)</i>	Last 4 digits of Social Security Number
1			HEAD		FT / PT / NA	
2					FT / PT / NA	
3					FT / PT / NA	
4					FT / PT / NA	
5					FT / PT / NA	
6					FT / PT / NA	
7					FT / PT / NA	



## Students: Certifications

**ANNUAL ELIGIBILITY CERTIFICATION**

Housing Tax Credit (HTC), TCAP, and Exchange Only

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**PART I: DEVELOPMENT DATA**

Property Name: \_\_\_\_\_

County: \_\_\_\_\_

BIN# \_\_\_\_\_

Effective Date: \_\_\_\_\_

TDHCA# \_\_\_\_\_

Unit#: \_\_\_\_\_

# Bedrooms: \_\_\_\_\_

Move-in Date: \_\_\_\_\_

\*Transfer from unit: \_\_\_\_\_

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**PART II: HOUSEHOLD COMPOSITION (TO BE COMPLETED BY THE HOUSEHOLD)**

The Texas Department of Housing and Community Affairs (TDHCA) is required to comply with HUD's reporting requirements; however, you are not required to provide this information. You may not be discriminated against on the basis of this information, or on whether or not you choose to furnish it. If you do not wish to furnish this information, please initial below.

**RESIDENT:** I do not wish to give information regarding ethnicity, race, sex, date of birth, elderly and disabled. (Initials) \_\_\_\_\_

If you choose not to give ethnicity, race, sex, age and other, *the Household Member name, Relationship to head of household and Student Status must still be completed.*

HH Mbr #	Household Member Full Name	Relationship to head of household	Student Status <i>(circle one)</i>	Sex M/F	Date of Birth (MM/DD/YY)	Race enter up to 5 categories	Ethnicity	Disabled?
1		HEAD	PT / FT / NA					
2			PT / FT / NA					
3			PT / FT / NA					
4			PT / FT / NA					
5			PT / FT / NA					
6			PT / FT / NA					



## Students: Certifications

**Owner's Certification of Compliance with HUD's Tenant Eligibility and Rent Procedures** **U. S. Department of Housing And Urban Development** For Personal Records ONLY - not for Submission to the Federal Government

Office of Housing  
Federal Housing Commissioner

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

Section B. Summary Information											
1. Project Name				12. Effective Date				21. Unit Number			
2. Subsidy Type				13. Anticipated Voucher Date				22. No. of Bedrooms			
3. Secondary Subsidy Type				14. Next Recertification Date				23. Building ID			
4. Property ID				15. Project Move-In Date				24. Unit Transfer Code			
5. Project Number				16. Certification Type				25. Previous Unit No.			
6. Contract Number				17. Action Processed				26. Security Deposit			
7. Project IMAX ID				18. Correction Type				27. 236 Basic/BMIR Rent			
8. Plan of Action Code				19. EIV Indicator				28. Market Rent			
9. HUD-Owned Project?				20. Prev. Subsidy Type				29. Contract Rent			
10. Previous Housing Code								30. Utility Allowance			
11. Displacement Status Code								31. Gross Rent			
								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																
02																
03																
04																
05																
06																
07																
08																

## Students: Certifications

Form RD 3560-8 (02-05) USDA—RURAL HOUSING SERVICE Form Approved OMB No. 0575-0189

**TENANT CERTIFICATION**

PART I — PROJECT AND UNIT IDENTIFICATION												
1. Effective Date			2. Project Name			3. Borrower ID and Project Number			4. Unit Type		5. Unit Number	
M M D D Y Y <input type="checkbox"/> Initial Certification <input type="checkbox"/> Recertification <input type="checkbox"/> Modify Certification <input type="checkbox"/> Assign/Remove RA <input type="checkbox"/> Vacate a Unit <input type="checkbox"/> Certification Expired & Eviction in Process <input type="checkbox"/> Designate 60 Day Absence <input type="checkbox"/> End 60 Day Absence <input type="checkbox"/> Tenant Transfer												
PART II — TENANT HOUSEHOLD INFORMATION												
6. Tenant Subsidy Code (enter code) 0—No Deep Tenant Subsidy 1—Rental Assistance (RA) 4—Other Public RA 5—Private RA 6—HUD Voucher 7—Other Types at Basic Rent			7. Social Security No.			8. Household Member Name (Last, First and Middle)			9. SEX		10. Date of Birth M M D D Y Y	
Other Subsidy Indicator (leave blank if none, P-Partial or F-Full) _____ Other Subsidy Amount (For Partial) \$ _____									11. Race		12. Ethnicity	
Choices for Race are: 1 - American Indian or Alaskan Native 2 - Asian 3 - Black or African			Ba. Number of Foster Children (if any) <input type="checkbox"/>			Choices for Race Det. Code: C - Customer Provided E - Employee Observed			13. Minor, Disabled, Handicapped or Full-Time Student 18 or Older <input type="checkbox"/> Total (Line 13)		14. Elderly, Disabled or Handicapped <input type="checkbox"/> Elderly Status	



## Students: Lease Requirements

A Development must use a lease or lease addendum that requires households to report changes in student status.

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## Students: Post-15 Monitoring

### No Longer Monitoring For:

- Documentation of Student **Status** **\*\*Restrictions Apply\*\***
- Applicable Fraction by building
- Application fees
- 8609 elections
- Ratio Utility Billing Systems (RUBS) are now part of the UA calculation
- Annual Income Recertification

All of the provisions allowed for under 10 TAC §10.623 will no longer apply and the property will be expected to comply with all aspects of Section 42 with the award of new credits.

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## Students: Post-15 Monitoring

### No Longer Monitoring For:

- Documentation of Student **Status** \*\*Restrictions Apply\*\*

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Income from student household members must continue to be evaluated for inclusion/exclusion based on the requirements explained in the previous section of this webinar.

All of the provisions allowed for under 10 TAC §10.623 will no longer apply and the property will be expected to comply with all aspects of Section 42 with the award of new credits.

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## Thank you!

### Texas Department of Housing and Community Affairs

STUDENT ELIGIBILITY REQUIREMENTS ARE DISCUSSED IN DETAIL IN THE HOUSING TAX CREDIT TRAINING AND MULTIFAMILY DIRECT LOAN TRAINING THAT ARE OFFERED REGULARLY. THE STUDENT INCOME REQUIREMENTS ARE DISCUSSED IN DETAIL IN THE INCOME DETERMINATION TRAINING THAT IS OFFERED BY THE DEPARTMENT.

RESOURCES CAN BE FOUND ONLINE AT [TDHCA.TEXAS.GOV](http://TDHCA.TEXAS.GOV).

