Earned Income Disallowance (EID)
Case scenario for Daryl Johnson

Daryl and Jenny Johnson reside in public housing with their three children. The Johnson's were admitted to public housing five months ago. Their most recent 50058 (Part 7 – Income) is on file. Daryl receives TANF for the family and Jenny works part time.

Daryl calls the PHA to report he started working.

The PHA receives 3rd party information regarding Daryl's job: He earns $275 bi-weekly.
Their TANF benefits have decreased to $350 per month.
Jenny is still working with the same wages ($150 weekly).

History and other facts needed to determine EID eligibility

Daryl lost his previous job two weeks prior to becoming a public housing resident. He had worked full time earning $23,000 per year.

Neither Daryl nor Jenny is in any type of job training program or economic self-sufficiency program.

The PHA conducts an interim as a result of the reported changes.

Twelve months go by and the PHA is conducting an interim for the following:

Daryl is now working full time earning $560 bi-weekly
TANF benefits have stopped
Jenny is no longer working

Head of household name	Social Security Number	Date modified (mm/dd/yyyy)

6. Assets

6a. Family member name	No.	6b. Type of asset	6c. Calculation (PHA use)	6d. Cash value of asset	6e. Anticipated Income
				$	$
				$	$
				$	$
				$	$
				$	$
				$	$
				$	$
				$	$

6f, 6g. Column totals	$ 6f.	$ 6g.	
6h. Passbook rate (written as decimal)		0. _________ 6h.	
6i. Imputed asset income: 6f X 6h (if 6f is $5,000 or less, put 0)		$ 6i.	
6j. Final asset income: larger of 6g or 6i			$ 6j.

7. Income

7a. Family member name	No.	7b. Income Code	7c. Calculation (PHA use)	7d. Dollars per year	7e. Income exclusions	7f. Income after exclusions (7d minus 7e)
Daryl	1	T	625 x 12	$ 7500	$	$ 7500
Jenny	2	W	150 x 52	$ 7800	$	$ 7800
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$

7g. Column total	$ 15300 7g.	
7h. Reserved		
7i. Total annual income: 6j + 7g		$ 7i.

7b: Income Codes

Wages:	Welfare:	SS/SSI/Pensions:	Other Income Sources:
B = own business	G = general assistance	P = pension	C = child support
F = federal wage	IW = annual imputed welfare income	S = SSI	E = medical reimbursement
HA = PHA wage	T = TANF assistance	SS = Social Security	I = Indian trust/per capita
M = military pay			N = other nonwage sources
W = other wage			U = unemployment benefits

Head of household name	Social Security Number	Date modified (mm/dd/yyyy)

6. Assets

6a. Family member name	No.	6b. Type of asset	6c. Calculation (PHA use)	6d. Cash value of asset	6e. Anticipated Income
				$	$
				$	$
				$	$
				$	$
				$	$
				$	$
				$	$
				$	$
6f, 6g. Column totals				$ 6f.	$ 6g.
6h. Passbook rate (written as decimal)					0. _________ 6h.
6i. Imputed asset income: 6f X 6h (if 6f is $5,000 or less, put 0)					$ 6i.
6j. Final asset income: larger of 6g or 6i					$ 6j.

7. Income

7a. Family member name	No.	7b. Income Code	7c. Calculation (PHA use)	7d. Dollars per year	7e. Income exclusions	7f. Income after exclusions (7d minus 7e)
Daryl	1	W	275 x 26	$ 7150	$ 3850	$ 3300
Daryl	1	T	350 x 12	$ 4200	$	$ 4200
Jenny	2	W	150 x 52	$ 7800	$	$ 7800
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
7g. Column total						$ 15300 7g.
7h. Reserved						
7i. Total annual income: 6j + 7g						$ 7i.

7b: Income Codes

Wages:	Welfare:	SS/SSI/Pensions:	Other Income Sources:
B = own business	G = general assistance	P = pension	C = child support
F = federal wage	IW = annual imputed welfare income	S = SSI	E = medical reimbursement
HA = PHA wage	T = TANF assistance	SS = Social Security	I = Indian trust/per capita
M = military pay			N = other nonwage sources
W = other wage			U = unemployment benefits

Head of household name	Social Security Number	Date modified (mm/dd/yyyy)

6. Assets

6a. Family member name	No.	6b. Type of asset	6c. Calculation (PHA use)	6d. Cash value of asset	6e. Anticipated Income
				$	$
				$	$
				$	$
				$	$
				$	$
				$	$
				$	$
				$	$
6f, 6g. Column totals				$ 6f.	$ 6g.
6h. Passbook rate (written as decimal)					0. _________ 6h.
6i. Imputed asset income: 6f X 6h (if 6f is $5,000 or less, put 0)					$ 6i.

6j. Final asset income: larger of 6g or 6i	$ 6j.

7. Income

7a. Family member name	No.	7b. Income Code	7c. Calculation (PHA use)	7d. Dollars per year	7e. Income exclusions	7f. Income after exclusions (7d minus 7e)
Daryl	1	W	560 x 26	$ 14560	$ 3530	$ 11030
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
				$	$	$
7g. Column total						$ 11030 7g.

7h. Reserved	
7i. Total annual income: 6j + 7g	$ 7i.

7b: Income Codes

Wages:	Welfare:	SS/SSI/Pensions:	Other Income Sources:
B = own business	G = general assistance	P = pension	C = child support
F = federal wage	IW = annual imputed welfare income	S = SSI	E = medical reimbursement
HA = PHA wage	T = TANF assistance	SS = Social Security	I = Indian trust/per capita
M = military pay			N = other nonwage sources
W = other wage			U = unemployment benefits

Earned Income Disallowance Worksheet (Public Housing)

Head of Household Name Daryl Johnson

Employed Individual's Name Daryl Johnson

Did an adult family member have an increase in annual income due to employment?	Yes X Continue	No ____ STOP
If you answer YES to any of the following questions, continue to the calculation – this person is eligible for the Earned Income Disallowance (EID)		
Was this person unemployed for 1 or more years previous to employment?	Yes ____	No X
Did this person earn less than 500 x ______ (established minimum wage*) in the last 12 months?	Yes ____	No X
Is this person **currently participating** in a job training program or economic self-sufficiency program?	Yes ____	No x
Does this person receive Welfare benefits now or within the last 6 months? (any dollar amount is sufficient)	Yes x	No ____
Did this person receive one-time benefits, wage subsidies, transportation assistance, from Welfare of at least $500 in the last 6 months?	Yes ____	No x
If you answered YES to any of the above questions continue, the household member is eligible for EID.		

*Established minimum wage is the higher of the Federal minimum wage or your State minimum wage, whichever is greater.

Establishing the baseline line income for the person who qualifies for EID:

1. Use the prior 50058 for **this person's** income: (The 50058 used to establish the family share prior to the change in income). DO NOT use the income of any other family member.
2. Add the total unearned and earned income of **this person** included in annual income from the 50058. (Again, this is the 50058 used before the family reported the change)

Total unearned income of this family member prior to the change	$ 7,500
Total earned income of this family member prior to the change	+ $ 0
The total of both unearned and earned income is the baseline **Total**	$ 7,500

Once you have established the baseline it will not change. The baseline total from page 1 will be used throughout the entire tracking period of EID.

Calculating EID during the full exclusion period: Excluding 100% of the increase

1. Enter the total gross earned income of this family member **now**	$ 7,150
2. Enter the total amount of unearned income of this family member **now**	+ $ 4,200
3. ADD the above two figures (line 1 + line 2)	$ 11,350
4. Enter the baseline figure calculated on page 1	- $ 7,500
5. Subtract line 4 from line 3: The amount entered is your exclusion from earnings, line 7e of the 50058	$ 3,850

Calculating EID during the phase in period. Excluding 50% of the increase.

1. Enter the total gross earned income of this family member **now**	$ 14,560
2. Enter the total amount of unearned income of this family member **now**	+ $ 0
3. ADD the above two figures (line 1 + line 2)	$ 14,560
4. Enter the baseline figure calculated on page 1	- $ 7,500
5. Subtract line 4 from line 3	$ 7,060
	Divide by 2
6. Divide the lower of: the amount on line 1 or line 5 by 2. The amount entered is your exclusion from earnings, line 7e of the 50058.	$ 3,530

Earned Income Disallowance Worksheet (HCV)

Head of Household Name Daryl Johnson

Employed Individual's Name Daryl Johnson

Did a person with disabilities have an increase in annual income due to employment?	Yes X Continue	No ____ STOP
If you answer YES to any of the following questions, continue to the calculation – this person is eligible for the Earned Income Disallowance (EID)		
Was this person unemployed for 1 or more years previous to employment?	Yes ____	No X
Did this person earn less than 500 x ______ (established minimum wage*) in the last 12 months?	Yes ____	No X
Is this person **currently participating** in a job training program or economic self-sufficiency program?	Yes ____	No X
Does this person receive Welfare benefits now or within the last 6 months? (any dollar amount is sufficient)	Yes X	No ____
Did this person receive one-time benefits, wage subsidies, transportation assistance, from Welfare of at least $500 in the last 6 months?	Yes ____	No X
If you answered YES to any of the above questions continue, the household member is eligible for EID.		

*Established minimum wage is the higher of the Federal minimum wage or your State minimum wage, whichever is greater.

Establishing the baseline line income for the person who qualifies for EID:

1. Use the prior 50058 for **this person's** income: (The 50058 used to establish the family share prior to the change in income). DO NOT use the income of any other family member.
2. Add the total unearned and earned income of **this person** included in annual income from the 50058. (Again, this is the 50058 used before the family reported the change)

Total unearned income of this family member prior to the change	$ 7,500
Total earned income of this family member prior to the change	+ $ 0
The total of both unearned and earned income is the baseline **Total**	$ 7,500

Once you have established the baseline it will not change. The baseline total from page 1 will be used throughout the entire tracking period of EID.

Calculating EID during the full exclusion period: Excluding 100% of the increase

1. Enter the total gross earned income of this family member **now**	$ 7,150
2. Enter the total amount of unearned income of this family member **now**	+ $ 4,200
3. ADD the above two figures (line 1 + line 2)	$ 11,350
4. Enter the baseline figure calculated on page 1	- $ 7,500
5. Subtract line 4 from line 3: The amount entered is your exclusion from earnings, line 7e of the 50058	$ 3,850
6. NOTE: if line 5 is more than line 1; the amount entered in line 1 will be your exclusion from earnings, 7e of the 50058	$ 3,850

Calculating EID during the phase in period. Excluding 50% of the increase.

1. Enter the total gross earned income of this family member **now**	$ 14,560
2. Enter the total amount of unearned income of this family member **now**	+ $ 0
3. ADD the above two figures (line 1 + line 2)	$ 14,560
4. Enter the baseline figure calculated on page 1	- $ 7,500
5. Subtract line 4 from line 3	$ 7,060
	Divide by 2
6. **Divide the lower of**: the amount on line 1 or line 5 ______ by 2. The amount entered is your exclusion from earnings, line 7e of the 50058	= $ 3,530

Earned Income Disallowance Worksheet (HCV)

Head of Household Name ____

Employed Individual's Name ____

Did a person with disabilities have an increase in annual income due to employment?	Yes ____ Continue	No ____ STOP
If you answer YES to any of the following questions, continue to the calculation – this person is eligible for the Earned Income Disallowance (EID)		
Was this person unemployed for 1 or more years previous to employment?	Yes ____	No ____
Did this person earn less than 500 x ______ (established minimum wage*) in the last 12 months?	Yes ____	No ____
Is this person **currently participating** in a job training program or economic self-sufficiency program?	Yes ____	No ____
Does this person receive Welfare benefits now or within the last 6 months? (any dollar amount is sufficient)	Yes ____	No ____
Did this person receive one-time benefits, wage subsidies, transportation assistance, from Welfare of at least $500 in the last 6 months?	Yes ____	No ____
If you answered YES to any of the above questions continue, the household member is eligible for EID.		

*Established minimum wage is the higher of the Federal minimum wage or your State minimum wage, whichever is greater.

Establishing the baseline line income for the person who qualifies for EID:

1. Use the prior 50058 for **this person's** income: (The 50058 used to establish the family share prior to the change in income). DO NOT use the income of any other family member.
2. Add the total unearned and earned income of **this person** included in annual income from the 50058. (Again, this is the 50058 used before the family reported the change)

Total unearned income of this family member prior to the change	$
Total earned income of this family member prior to the change	+ $
The total of both unearned and earned income is the baseline **Total**	$

Once you have established the baseline it will not change. The baseline total from page 1 will be used throughout the entire tracking period of EID.

Calculating EID during the full exclusion period: Excluding 100% of the increase

1. Enter the total gross earned income of this family member **now**	$
2. Enter the total amount of unearned income of this family member **now**	+ $____________________
3. ADD the above two figures (line 1 + line 2)	$
4. Enter the baseline figure calculated on page 1	- $____________________
5. Subtract line 4 from line 3: The amount entered is your exclusion from earnings, line 7e of the 50058	$

Calculating EID during the phase in period. Excluding 50% of the increase.

1. Enter the total gross earned income of this family member **now**	$
2. Enter the total amount of unearned income of this family member **now**	+ $____________________
3. ADD the above two figures (line 1 + line 2)	$
4. Enter the baseline figure calculated on page 1	- $____________________
5. Subtract line 4 from line 3	$
	Divide by 2
6. **Divide the lower of**: the amount on line 1 or line 5 by 2. The amount entered is your exclusion from earnings, line 7e of the 50058.	= $

Earned Income Disallowance Worksheet (Public Housing)

Head of Household Name ____

Employed Individual's Name ____

Did an adult family member have an increase in annual income due to employment?	Yes ____ Continue	No ____ STOP
If you answer YES to any of the following questions, continue to the calculation – this person is eligible for the Earned Income Disallowance (EID)		
Was this person unemployed for 1 or more years previous to employment?	Yes ____	No ____
Did this person earn less than 500 x ______ (established minimum wage*) in the last 12 months?	Yes ____	No ____
Is this person **currently participating** in a job training program or economic self-sufficiency program?	Yes ____	No ____
Does this person receive Welfare benefits now or within the last 6 months? (any dollar amount is sufficient)	Yes ____	No ____
Did this person receive one-time benefits, wage subsidies, transportation assistance, from Welfare of at least $500 in the last 6 months?	Yes ____	No ____
If you answered YES to any of the above questions continue, the household member is eligible for EID.		

*Established minimum wage is the higher of the Federal minimum wage or your State minimum wage, whichever is greater.

Establishing the baseline line income for the person who qualifies for EID:

1. Use the prior 50058 for **this person's** income: (The 50058 used to establish the family share prior to the change in income). DO NOT use the income of any other family member.
2. Add the total unearned and earned income of **this person** included in annual income from the 50058. (Again, this is the 50058 used before the family reported the change)

Total unearned income of this family member prior to the change	$
Total earned income of this family member prior to the change	+ $
The total of both unearned and earned income is the baseline **Total**	$

Once you have established the baseline it will not change. The baseline total from page 1 will be used throughout the entire tracking period of EID.

Calculating EID during the full exclusion period: Excluding 100% of the increase

1. Enter the total gross earned income of this family member **now**	$
2. Enter the total amount of unearned income of this family member **now**	+ $___________________
3. ADD the above two figures (line 1 + line 2)	$
4. Enter the baseline figure calculated on page 1	- $___________________
5. Subtract line 4 from line 3: The amount entered is your exclusion from earnings, line 7e of the 50058	$
6. NOTE: If line 5 is more than line 1; the amount entered in line 1 will be your exclusion from earnings, 7e of the 50058	$

Calculating EID during the phase in period. Excluding 50% of the increase.

1. Enter the total gross earned income of this family member **now**	$
2. Enter the total amount of unearned income of this family member **now**	+ $___________________
3. ADD the above two figures (line 1 + line 2)	$
4. Enter the baseline figure calculated on page 1	- $___________________
5. Subtract line 4 from line 3	$
	Divide by 2
6. **Divide the lower of;** the amount on line 1 or line 5 by 2. The amount entered is your exclusion from earnings, line 7e of the 50058	= $