

## **50059 and 50059-A forms**

### **Selected Item entry choices and instructions**

#### **50059 Form:**

##### **Item 2 - Subsidy Type**

- 1 - Section 8
- 2 - Rent Supplement
- 3 - RAP
- 4 - Section 236
- 5 - BMIR
- 6 - Reserved
- 7 - Section 202/PRAC
- 8 - Section 811/PRAC
- 9 - Section 202/162 PAC
- 0 - See sections 4.7 & 4.8 of TRACS 202C  
MAT Guide (TRACS Operating Tips)

##### **Item 18 - Certification Type**

- MI - Move In
- AR - Annual Recertification
- IR - Interim Certification
- IC - Initial Certification
- UT - Unit Transfer (Includes changes in family composition, and/or income, assets and expenses. Otherwise, it's a simple unit transfer reported with the 50059-A form).

**For partial certifications (MO, TM, GR, UT), fill out the HUD 50059-A.**

##### **Item 19 - Action Processed**

- 1 - for a correction to a prior 50059 with the same effective date. Otherwise, leave blank.

##### **Item 20 - Correction Type**

- Blank - No Correction
- 1 - Administrative Resubmission
- 2 - Corrects Owner or Contract  
Administrator certification errors
- 3 - Corrects Tenant Misreporting

##### **Item 26 – Unit Transfer Code**

Leave blank if the 50059 is not reporting a unit transfer which includes changes in family composition, and/or income, assets and expenses.

Y – Unit Transfer

**Item 27 – Previous Unit Number**

If Item 26 is Y, enter number of unit tenant previously occupied.

**Item 38 - Relationship**

H - Head of Household (never more than one per household)

S - Spouse

K - Co-head

D - Family Member that qualifies as a Dependent

O - Other Adult Family Member

F - Foster Child under the age of 18, and children of Foster children

L - Live-in Attendants

**Item 40 – Race**

Based on the Race & Ethnic Data form completed by each household member, please enter the appropriate letter listed below. Note: If the Race & Ethnic Data form is not completed for a household member, enter “X” in this Item for that member.

X = Declined to report

I = American Indian or Alaska Native

A = Asian

B = Black or African-American

H = Native Hawaiian or Other Pacific Islander

W = White

O = Other

e.g., If the Household member is Asian and White, as stated on the HUD-27061-H, enter AW.

e.g., If the Household member is Black or African-American, as stated on the HUD-27061-H, enter B.

**Item 41 - Ethnicity**

0 - Tenant Declined to Report

1 - Hispanic

2 - Non-Hispanic

**Item 43 - Special Status Code**

E - Elderly Head, Co-Head or Spouse (At least 62 years of age on the effective date of this certification)

S - Full-time Student who is at least 18 years old as of the effective date of this certification, who is not Head, Co-Head or Spouse. Must have Relationship Code of D.

H - Family member who is disabled. (This code cannot be used with relationship code of O.)

J - Dependent whose custody is jointly shared by more than one family and who receives a dependent allowance, along with any applicable child care allowance. This codes must be paired with a K code.

C - Dependent whose custody is jointly shared by more than one family but who does not receive a dependent allowance. Such a person's child care expenses count toward the child care allowance. May or may not be paired with a K code.

K - Dependent whose custody is jointly shared by more than one family and lives in the unit 50% or more of the time. Count for unit size and income limit purposes. This code must be paired with a J code and may or may not be paired with a C code.

Note: The J and C codes are only applicable when the Relationship Code is set to D (Dependent). The K code is allowed when C is true and must be true when J is true. The J and C codes may not both be set to true. A dependent without either the J or C codes is assumed to be a full-time resident of the unit. Valid values are JK, C, CK.

#### **Item 44 - Student Status**

Y = Student (either full or part-time) at an institution of higher education who is eligible for assistance under the rules (4350.3 Rev. 1, Chg.2, Section 3-13).  
Otherwise, leave blank

#### **Item 46 - Eligibility Code**

EC - Member is an Eligible Citizen

EN - Member is an Eligible Non-Citizen

IC - Ineligible Child of a Head of Household or Spouse

IN - Member is an Ineligible Non-Citizen

IP - Ineligible Parent of Head of Household or Spouse

PV - Pending Verification - documents have been submitted

ND - No documentation submitted. For use when family is receiving prorated assistance at admission. Member is treated as ineligible for proration purposes.

XX - Individuals who are not counted as members of the family (i.e., foster children, live-in attendants, foster adults)  
The Relationship Codes related to this Eligibility code are F or L.

**Item 66 – Member Number:** Family member number (from Item 34) to which income is attributed.

**Note: All monetary amounts on the 50059 form are entered as whole dollar amounts.**

**Item 67 - Income Type Code**

B - Business (including distributed profits and net income from business/self-employment)  
CS - Child Support  
F - Federal Wages  
G - General Assistance  
I - Indian Trust  
M - Military Pay  
N - Other Non-Wage source (including alimony, unemployment benefits)  
PE - Pensions (This includes veteran pensions, military retirement and income from all other pensions and annuities)  
SI - Supplemental Security Income/SSI (This covers both personal benefit, and State Supplements administered by the Social Security Administration)  
SS - Social Security (both personal and dual entitlements)  
T - TANF (Temporary Aid to Need Families)  
U - Unemployment  
W - Non-Federal Wage (Include salaries, tips, commissions, bonuses and other income from employment)\*

\*If reporting wages for a full-time student who is at least 18 years old, only the first \$480 earned is reported.

**Item 68 - Amount** (of income)

Enter the amount anticipated to be received during the 12 month period following the effective date of this certification.

**Item 76 - Description** (of asset)

Enter each asset the tenant currently owns and each asset disposed or for less than fair market value in the two years preceding the effective date of this certification.

**Item 77 - Status** (of asset)

C - Current (if the member currently owns the asset)

I - Imputed (if the asset has been disposed of for at least \$1000 less than fair market value in the last two years preceding the effective date of this certification.)

See 4350.3, Paragraph 5-7

**Item 78 - Cash Value** (of asset)

Provide the cash value of the asset. For checking accounts, use the average balance over a 6 month period. For savings accounts, use the current value. Round to whole dollar amounts.

**Item 79 - Actual Yearly Income** (of assets)

Enter the anticipated amount to be received for the 12 month period following the effective date of this certification. Round to whole dollar amounts.

**Item 80 - Date Divested**

If the status of an asset in Item 77 is "I", enter the date the asset was disposed of for less than fair market value.

**Item 70 - Total Employment Income**

Total income from the following income type codes:

B - Business

F - Federal Wages

M - Military Pay

W - Non-Federal Wages

**Item 71 - Total Pension Income**

Total income from the following income type codes:

PE - Pensions

SI - Supplemental Security Income (SSI)

SS - Social Security

**Item 72 - Total Public Assistance Income**

Total income from the following income type codes:

G - General Assistance

T - TANF

**Item 73 - Total Other Income**

Total income from the following income type codes:

CS - Child Support

I - Indian Trust

N - Other Non-Wages

U - Unemployment

**Item 74 - Total Non-Asset Income**

Total of Items 70, 71, 72 and 73 (Employment, Pensions, Public Assistance, Other).

**Item 81 - Cash Value of Assets**

Total cash value of all assets listed in Item 78.

**Item 82 - Actual Income from Assets**

Total of Actual Yearly Income amounts listed in Item 79.

**Item 84 - Imputed Income from Assets**

Imputed income from assets is only applicable if Item 81 exceeds \$5,000. If Item 81 is greater than \$5,000, multiply Item 81 by Item 83 and enter the result.

Note: The rule for imputing income from assets does not apply to the BMIR program.

**Item 85 - Asset Income**

Enter the greater of Item 82 or Item 84.

**Item 86 - Total Annual Income**

Total of Items 74 and 85.

**Item 97 - Deduction for Dependents**

Count the number of family members with a relationship code of "D" (see Item 38) and multiply by \$480. IMPORTANT: Do not count any Dependent with a "C" joint custody code shown in Item 43.

**Item 98 - Child Care Expense (work)**

Enter the total amount of child care expenses incurred that enables a family member to work. Child care expenses may be claimed for children who are under the age of 13. If child care expenses are claimed, please be sure to use a code of "C" in Item 49.

**Item 99 - Child Care Expense (school)**

Enter the total amount of child care expenses incurred that enables a family member to work. Child care expenses may be claimed for children who are under the age of 13. If child care expenses are claimed, please be sure to use a code of "C" in Item 49.

**Item 100 - 3% of income**

Multiply Item 86 by .03 and enter result, rounded to whole dollar amount.

**Item 101 - Disability Expense**

Enter the anticipated amount the family expects to pay for qualifying attendant care and/or auxiliary apparatus required, for the 12 month period following the effective date (Item 13) of this certification, which enables an adult family member to work.

**Item 102 - Disability Deduction**

If Item 101 is greater than Item 100, subtract Item 100 from Item 101 and enter the result. If Item 101 is less than Item 100, enter zero.

**Item 103 - Medical Expense**

Medical expenses only apply to households whose Head, Spouse or Co-Head is disabled or age 62 or older as of the effective date of this certification. Include only unreimbursed medical expenses. If there are no medical expenses, enter zero.

**Item 104 - Medical Deduction**

If Item 101 is zero, subtract Item 100 from Item 103 and enter the result.

If Item 101 is greater than or equal to Item 100, enter the amount from Item 103.

If Item 101 is less than Item 100, use the following calculation and enter the result...  
(Item 103 + Item 101) - Item 100

**Item 105 - Elderly Family Deduction**

If either the Head, Spouse or Co-Head have a Special Status Code of "E" or "H" in Item 43, enter \$400.

**Item 106 - Total Deductions**

Add Items 97 + 98 + 99 + 102 + 104 + 105 and enter result.

**Item 107 - Adjusted Annual Income**

Subtract Item 106 (Total Deductions) from Item 86 (Total Annual Income) and enter result. If Item 106 is greater than Item 86, enter zero.

**Item 108 - Total Tenant Payment**

Total Tenant Payment for Section 8, RAP, PRAC and PAC tenants is the greater of:

- 30% of monthly adjusted income

(Divide Adjusted Annual Income by 12, round to nearest penny, multiply by 30%, round to nearest penny and then to whole dollar amount, rounding up at .5, rounding down at .49)

- 10% of monthly gross income

(Divide Annual Income by 12, round to nearest penny, multiply by 10%, round to nearest penny and then to whole dollar amount, rounding up at .5, rounding down at .49)

- Welfare rent (If applicable to your area)

- \$25 minimum rent (Section 8 only), unless there is a hardship exemption granted (see Item 113).

**Item 109 - Tenant Rent**

Tenant Rent - The portion of the TTP the tenant pays each month for rent. If utilities are paid by the tenant, the tenant rent is the TTP less the Utility Allowance. If the utility allowance is greater than the TTP, enter \$0.

**Item 110 - Utility Reimbursement**

ONLY FOR PROPERTIES WITH UTILITY ALLOWANCE - If the utility allowance is greater than the TTP, then subtract the TTP from the utility allowance and enter the result here.

**Item 111 - Assistance Payment**

The Assistance Payment is the amount the property requests from HUD each month.

$GR(\text{Item } 33) - TTP(\text{Item } 108) = AP(\text{Item } 111)$

If this is a PRAC tenant, AP is Operating Rent -TTP, even if the difference is a negative amount.



**Item 113 - Hardship Exemption**

FOR SECTION 8 TENANTS ONLY!

If Item 111 is less than \$25, select one of the following codes:

- 1 - Family has lost Federal, State or Local Government assistance, or is waiting for an eligibility determination.
- 2 - The family would be evicted if the Minimum Rent requirement were imposed.
- 3 - The family income has decreased due to a change in circumstances, including but not limited to loss of employment.
- 4 - A death in the family has occurred.
- 5 - Other applicable situations, as determined by HUD, have occurred.

**Item 114 - Waiver Type Code**

Leave blank if a waiver has not been granted by HUD.

Valid values for waiver codes granted by HUD are:

AGE - Age waiver for an elderly property

INC - Income (For subsidy types other than Sec. 8)

See 4350.3 paragraph 3-8

NEAR - Near Elderly

DSBL - Waiver for a non-disabled person to move in to a property for the disabled (e.g. 811 PRAC)

OTH - Other waiver not covered by the above codes

If more than one waiver applies, pick the first code that applies. Important: Proper documentation from the Field Office or HUD Washington should be kept in the tenant file.

## **Selected entry choices for the 50059-A form:**

### **Item - 5. Transaction type**

MO = Move-out

TM = Termination

GR = Gross Rent Change

UT = Unit Transfer

### **Item - 14. Move Out Code**

Enter the valid code which best describes the main reason for the Move out.

1- Owner initiated for nonpayment of rent

2- Owner initiated - other

3- Tenant initiated - other

4- Death of Sole Family member

### **Item - 15. Date of Death of Sole Member**

If Move Out Code is "4", please enter the date of death of the tenant. Enter as MMDDYYYY.

### **Item - 16. Termination Code**

TI = TTP Equals/Exceeds Gross Rent or moving to market rent (Section 236 and BMIR)

TC = Did not supply citizenship/eligible alien documentation

TR = Did not re-certify on time. Tenant required to pay market rent.

TF = Tenant refused to transfer as agreed or submitted false data

CE = Subsidy contract expired-not renewed. Note: Not for use when renewal is delayed

ST = Ineligible Student Note: "ST" code cannot be used in a PRAC property. PRAC household with ineligible student must move out.

DS = Double subsidy at move-in. Use to terminate subsidy when a move-out from a former

property is effective after the move-in date for the new property.

### **Item - 17. Description**

Enter any other details you may want to provide as they relate to the termination of a tenant's subsidy.

### **Item - 18. Prev. Unit No. (Unit Transfers only)**

The unit number from which the tenant transferred.