

UTILITY ALLOWANCES

January 2023

Utility Allowance

The purpose of this training is to provide guidance for calculating a Utility Allowance (UA) under the Department's multifamily programs.

The Department will cite noncompliance and/or not approve a UA if it is not calculated in accordance with the requirements of 10 TAC §10.614, Treasury Regulation 1.42-10 and Chapter 18 of the 8823 Audit Guide.

Owners are required to comply with the provisions of the above section as well as any existing federal or state program guidance.

Frequently asked questions (FAQ) can be found on the Department's website: <https://www.tdhca.state.tx.us/pmcomp/compFaqs.htm>

Utility Allowance

Utility Allowance Information

<https://www.tdhca.state.tx.us/pmcomp/utility-allowance.htm>



The Utility Allowance Team

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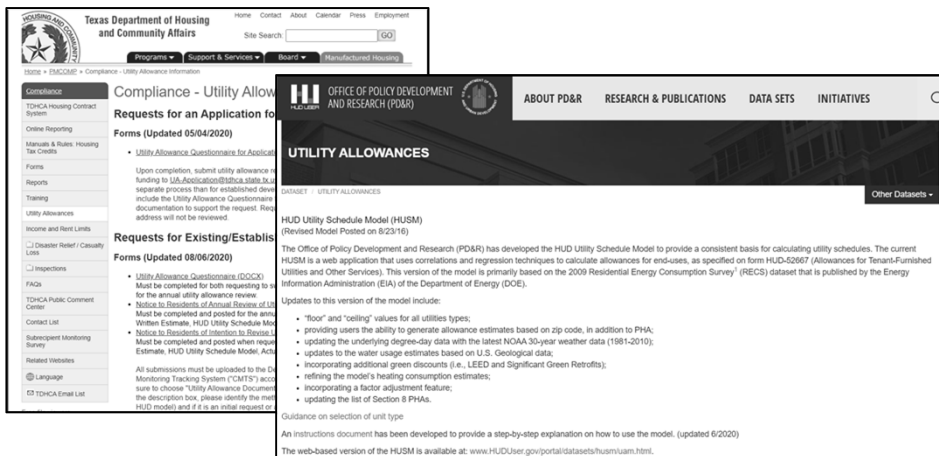
Nicole Martinez, nicole.martinez@tdhca.state.tx.us

Utility Allowance

Where to find important documents and information:

<https://www.tdhca.state.tx.us/pmcomp/utility-allowance.htm>

<https://www.huduser.gov/portal/resources/utilallowance.html>



These forms are updated periodically, please make sure you are checking the websites and using the most current version of the required documents.

Utility Allowance: Definitions & Terms

- Building Types
 - HUD Document referenced in §10.614(b)(1): https://www.hud.gov/sites/documents/DOC_11608.PDF
 - Additional Resource from HUD: <https://www.huduser.gov/portal/sites/default/files/pdf/HUSM-Instructions.pdf>
- Power to Choose
 - <http://powertochoose.com/>
 - Sometimes a zip code is on the website but the municipality is a provider – double check this!
- Component Charges
 - The actual cost associated with the billing of a residential utility (Rates, Fees, Taxes)
- Multifamily Direct Loan (MFDL)
 - Funds provided through the HOME Program (HOME), Neighborhood Stabilization Program (NSP), National Housing Trust Fund (NHTF), Repayments from the Tax Credit Assistance Program (TCAP RF), HOME American Rescue Plan (HOME-ARP), or other program available through the Department, local political subdivision, or administrating agency for multifamily development that require a Utility Allowance

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Utility Allowance: Definitions & Terms

- Renewable Source
 - Energy produced from energy property described in IRC §48 or IRC §45(d)(1) through (4), (6), (9) or (11)
- Submetered Utility
 - A utility purchased from or through a local utility provider by the building owner where the resident is billed directly by the owner of the building or to a 3rd party billing company
 - This must be based on the resident's actual consumption of that utility and not an allocation method or Ratio Utility Billing System (RUBS); and
 - The rate at which the utility is billed does not exceed the rate incurred by the building owner for that utility
- Utility Allowance
 - An estimate of the expected monthly cost of any utility for which a resident is financially responsible (other than phone, cable or internet)
- Utility Provider
 - The company that provides the residential utility service, AKA "Provider"
 - If unsure of who the provider is, check the property-paid accounts, i.e. Clubhouse

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Utility Allowance: Required Forms

- Utility Allowance Questionnaire
- Resident Posting (Annual or Change)
- Previous Year's approved UA
- Current Methodology request and all necessary back-up

<https://www.tdhca.state.tx.us/pmcomp/utility-allowance.htm>

The collage shows three main forms:

- NOTICE TO RESIDENTS OF ANNUAL REVIEW OF UTILITY ALLOWANCE:** A form for annual reviews, including a table for listing utility providers with columns for 'Type of Housing', 'File Number', 'Utility Source', 'Effective Date', and 'Methodology'.
- NOTICE TO RESIDENTS OF INTENTION TO CHANGE THE METHODOLOGY USED TO CALCULATE THE UTILITY ALLOWANCE:** A form for methodology changes, including a table for listing utility providers with columns for 'Utility Source', 'Effective Date', and 'Methodology'.
- Utility Allowance Questionnaire:** A form for initial requests or annual reviews, including a table for listing utility providers with columns for 'Utility Source', 'Effective Date', and 'Methodology'.

Utility Allowance: How to Submit

All submissions must be uploaded to the development's Compliance Monitoring Tracking System (CMTS) account. When uploading, please be sure to choose "Utility Allowance Documents" in the "Type" dropdown menu. In the description box, please identify the method (e.g., Written Local Estimate, HUD model, etc.) and if it is an initial request or annual review. In the "TDHCA Contact" dropdown menu, please select "Utility Allowance."

If the submission is not uploaded as outlined above it will not be received by the Utility Allowance Team and the development may be cited with noncompliance.

Utility Allowance: Methodologies

Types of Utility Allowance (UA) Methodologies

- Not Department Issued
 - Rural Housing Services (RHS or RD)
 - HUD-Issued Utility Allowance
- Department Reviewed and/or Issued
 - Public Housing Authority (PHA)
 - Written Local Estimate (WLE)
 - Energy Consumption Model (ECM)
 - Actual Use Method
 - HUD Utility Schedule Model (HUSM)

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Utility Allowance: PHA Method

Public Housing Authority (PHA) Method

- The Utility Allowance established by the applicable PHA for the Housing Choice Voucher Program (HCV Program)
 - If a PHA provides vouchers to your tenants but is not the most applicable PHA you would not be able to use the UA schedule from that PHA
- If the PHA publishes different schedules based on building type, the owner is responsible for implementing the correct schedule based on the development's building type(s)
 - In the event the PHA publishes a UA Schedule specifically for energy efficient units, and the owner desires to use such a schedule, the owner must demonstrate that the building(s) meet the PHA's specifications for energy efficiency once every five years
 - If the PHA Utility Schedule lists flat fees for any utility, those flat fees must be included in the calculation of the Utility Allowance, if the resident is responsible for that utility
 - If the PHA schedule reflects a rounded amount, then the PHA method of rounding should be used.

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Utility Allowance: PHA Method

Public Housing Authority (PHA) Method continued

- This methodology must be used for the voucher holders from the PHA (unless the building has MFDL funds)
- If the development is located in an area that does not have a municipal, county or regional housing authority that publishes a Utility Allowance schedule for the HCV Program, owners must select an alternative methodology, unless the building(s) is(are) located in the published HCV service area of:
 - A Council of Government (COG) created under Texas Local Government Code, Chapter 303, that operates a Housing Choice Voucher Program;
 - The Department’s Housing Choice Voucher Program; or
 - Another PHA which publishes a separate utility allowance schedule specific to the development’s location
- Annual review by the Department is not required, unless there is a change to the utilities the resident is financially responsible for
 - Annual Review is required for HOME-ARP Developments using this methodology

Utility Allowance: PHA Method

The image displays several overlapping forms titled "Utility Allowance Schedule" from the U.S. Department of Housing and Urban Development. Each form includes the following information:

- Title:** Utility Allowance Schedule
- Agency:** U.S. Department of Housing and Urban Development, Office of Public and Indian Housing
- OMB Approval:** No. 25577-0169, exp. 7/31/2022
- Date:** Effective 6-1-2022
- Locality:** Housing Authority of the City of Austin, TX
- Unit Type:** Multi-Family (Elevator), Single-Family (Detached House), Multi-Family (Apartment), and Row House/Townhouse.
- Utility or Service:** Heating (Natural Gas, Bottle Gas, Electric, Oil).
- Monthly Dollar Allowances Table:** A table with columns for unit types (0 BR, 1 BR, 2 BR, 3 BR, 4 BR, 5 BR) and rows for different utility services.

Examples of utility allowance values from the forms:

Utility/Service	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating - Natural Gas						
Heating - Bottle Gas/Propane						
Heating - Electric	\$9.00	\$10.00	\$12.00	\$14.00	\$16.00	\$18.00
Heating - Oil						

Additional utility allowance values for other services:

Service	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Water	\$20.00	\$23.00	\$25.00	\$27.00	\$29.00	\$31.00
Sewer	\$12.00	\$14.00	\$16.00	\$18.00	\$19.00	\$21.00

URL: <https://www.hacanet.org/wp-content/uploads/2022/02/Utility-Allowances-Eff-6-1-2022.pdf>

Utility Allowance: PHA Method

The Department will utilize this report to determine the applicable PHA for the area; however, the PHA used must participate in the Section 8 Program.

PHA Code	Name, Phone, Fax, Email	Physical Address	Time
TX327	Housing Authority of the City of Abilene Phone: (325)676-6385 x6394 Fax: (325)676-6375 Email: Gene.Reed@abileneha.org	1149 E South 11th Street ABILENE TX , 79602	
TX064	Alamo Housing Authority Phone: (956)787-2352 Fax: (956)781-8886 Email: mveita@alamoha.com	309 N. 9th St. ALAMO TX , 78516	
TX241	Housing Authority of Alba Phone: (903)765-2541 Fax: (903)765-9019 Email: albahousingauthority@gmail.com	145 N. Osborn St ALBA TX , 75410	
TX178	Alice Housing Authority Phone: (361)664-3453 Fax: (361)664-3464 Email: info@alicehousingauthority.com	125 Omiba Alice TX , 78333	Combined

https://www.hud.gov/sites/dfiles/PIH/documents/PHA_Contact_Report_TX.pdf

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Utility Allowance: PHA Method

What if the development is in an area that does not have a PHA, but another PHA serves the area?

In this case, the PHA that serves the area MUST issue a Utility Allowance for the specific area in which a development is located in order to use this methodology.

Effective October 1, 2022

Utility Allowance Schedule The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

OMB Approval No. 2577-0169
exp. 7/31/2022

Locality: Denton Housing Authority, TX		Unit Type: Multi-Family (Apartment/Walk-Up /Duplex/ Rowhouse)		Date: 10/01/2022			
Utility or Service	City of Lewisville	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas	\$6.00	\$9.00	\$12.00	\$17.00	\$20.00	\$24.00
	b. Bottle Gas						
	c. Electric	\$11.00	\$14.00	\$19.00	\$26.00	\$32.00	\$41.00
	d. Electric- Heat Pump	\$8.00	\$10.00	\$13.00	\$18.00	\$23.00	\$29.00
	e. Fuel Oil / Other						

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Utility Allowance Questionnaire

This form must be completed by all owners requesting to switch utility allowance methodologies and when submitting an allowance for annual review. Please contact Cara Pollei with any questions at (512) 475-3821 or cara.pollei@tdhca.state.tx.us. All submissions must be uploaded to the Development's Compliance Monitoring Tracking System (CMTS) account.

When uploading, please be sure to choose "Utility Allowance Documents" in the "Type" dropdown menu. In the description box, please identify the method (e.g., written local estimate, HUD model) and if it is an initial request or annual review. In the "TDHCA Contact" dropdown menu, please select "Utility Allowance."

1. Name of Development: Pandora Springs and CMTS ID 6789
2. Development address: 221 East 11th Street
City: Austin Zip Code: 78711 County: Travis
3. Types of TDHCA Program Funding :

Type of Funding	File Number
HTC	230626

4. Type of request: Request to Switch to a Different Methodolgy
 - a. List CURRENT utility allowance method and source for utilities that residents pay.

Utility	Source (e.g. name of utility provider or housing authority)	Effective Date	Methodology
Electric	Southern Federal	01/18/2023	HUD Utility Model Schedule

- b. List NEW or UPDATED utility allowance method and source for utilities that residents pay.

Utility	Source (name of utility provider or housing authority)	Anticipated Effective Date	Methodology
Electric	Enercon	06/29/2023	Energy Consumption Model

5. If this request is for the annual review of the current methodology, were the annual review requirements met last year?

Yes

a. If no, please select reason:

6. What is the beginning date of the 90 day review period? 03/31/2023

7. Has the proposed utility allowance been posted in a common area of the Leasing Office for resident review (10TAC§10.614(h))? Yes

a. As of what date: 03/31/2023

8. What is the intended effective date? 06/29/2023

9. Does the Development receive assistance from USDA- Rural Development (formerly Farmer's Home Administration (FmHa))? No

a. If yes, do any of the residents in the Development receive Rental Assistance from the USDA?

10. Is the building a HUD-regulated building? No

11. Does the Development have HOME funds from TDHCA or any other Participating Jurisdiction (PJ)? No

a. If yes, what PJ awarded the HOME funds?

b. Does each building have at least one (1) HOME unit?

12. What is the Building Configuration? (if there are multiple building types, indicate below)

a. Building Type 1: Apartments (5+ units)

b. Building Type 2:

13. Utility information:

	Owner Pays	Resident Pays	Not Applicable	Paid directly to utility provider or to/thru the owner?	If paid to OWNER, select billing method and include the most recent billing cycle evidence
Gas	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	n/a	select one
Electric	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Utility Provider	select one
Water	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	n/a	select one
Sewer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	n/a	select one
Trash Collection	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	n/a	select one
The units are heated by:	<input type="checkbox"/> gas		<input checked="" type="checkbox"/> electric	select type	
The stoves in the unit are:	<input type="checkbox"/> gas		<input checked="" type="checkbox"/> electric		
If individual hot water heaters, they are:	<input type="checkbox"/> gas		<input checked="" type="checkbox"/> electric		

14. Confirm documentation submitted with this request.

- a. Current UA sources (ex: last year's approval letter from TDHCA or PHA schedule)
- b. New/Updated UA sources (ex: letter from utility provider, HUD model & back up, PHA schedule, etc.)
- c. Posted Notice to Residents (not needed if annual PHA request with no changes; this is required for ALL requests to change methodology or utilities billed)
- d. **If paid to or through the owner a copy of a current resident bill and the applicable rate plan for the utility.**

Cara Pollei

03/31/2023

Completed By

Date

Compliance Manager

Pollei Management Group

Title

Company Name

(512) 475-3821

cara.pollei@tdhca.state.tx.us

Phone Number

Email Address

NOTICE TO RESIDENTS OF ANNUAL REVIEW OF UTILITY ALLOWANCE

Date of Posting: 03/31/2023

Please be aware that effective on 06/29/2023, the management and ownership of Pandora Springs will implement the following revised Utility Allowances. These allowances were calculated using the same methodology that was used to calculate the allowance last year.

Unit Type	Current Utility Allowance	Updated Utility Allowance
1 Bedroom	\$ 77	\$ 59
2 Bedroom	\$ 100	\$ 71
	\$	\$
	\$	\$

During a period of 90 days from the date of service of this notice, residents of Pandora Springs may submit written comments on these proposed changes to the management office at Pollei Management Group. ATTN: Cara Pollei - 221 East 11th Street, Austin, TX 78711.

All comments received will be transmitted to the Texas Department of Housing and Community Affairs (TDHCA). If you wish, you may also send a copy of your comments directly to TDHCA at the following address:

Texas Department of Housing and Community Affairs
P.O. Box 13941
Austin, Texas 78711-3941
Attn: Cara Pollei

Please provide the following reference on all correspondence: Pandora Springs, CMTS ID: 6789

TDHCA will review the comments. When approved, this change will be effective for rents due 06/29/2023.

For further information on Utility Allowances, visit the Texas Department of Housing and Community Affairs website at www.tdhca.state.tx.us. To access, select the "Support and Services" tab; then select "Compliance". A side menu will appear, select "Utility Allowances".

Lauren Smith
Property Manager
Pandora Springs

Revised April 22, 2020

SECTION II PROPERTY SPECIFIC ALLOWANCES / SIGNED DOCUMENTATION

The following chart provides a breakdown of the utility allowances for Pandora Springs, based on the Energy Consumption Model Methodology:

All Allowances per [REDACTED] Letter and Certifications dated 03/24/23.

<u>Pandora Springs</u>	<u>Energy Consumption Model</u>	
Electric Utility Allowances	1 BR	2 BR
Electric Utility Allowances	\$ 58.37	\$ 70.94
TOTAL ALLOWANCES ROUNDED UP	\$ 59.00	\$ 71.00

NOTES:

1. Water, Sewer and Trash are property paid and therefore not included in the resident paid allowances above.
2. This is a request for a change in methodology from the HUD Model to the Energy Consumption Model (ECM).

Supporting documentation included on the following pages:

- [REDACTED]
- Property Data Worksheet for ECM
- Professional Engineer License Copy
- Professional Engineer Qualifications

Pandora Springs
221 East 11th Street
Austin, TX 78711

March 24, 2023

RE: Utility Allowance Estimate

To Whom It May Concern:

In our opinion, as of this date, the monthly utility charge estimates listed below would apply for the above noted property:

Pandora Springs		Energy Consumption Model	
Electric Utility Allowances			
	1 BR	2 BR	
Electric Utility Allowances	\$ 58.37	\$	70.94
TOTAL ALLOWANCES ROUNDED UP	\$ 59.00	\$	71.00

NOTES:

1. The above utility allowances were produced using an engineer approved Energy Consumption Model.
2. The model has been calculated by a properly licensed mechanical engineer. The individual is not related to the Owner within the meaning of §267(b) or §707(b) of the Code.
3. Estimates for electric charges were developed using the local provider rates from Amigo Energy, a certain local electric utility provider, who is able to service the subject property. The provider is listed on the Power to Choose website located at <http://www.powertochoose.org>. Component charges used were less than 45 days old as of the date on this letter.
 - a. Estimates include electric costs for heating; cooking; other electric (lighting, etc.); air conditioning; water heating; all monthly component charges.
4. The Energy Consumption Model used for this property takes into consideration, but is not limited to, the following items:
 - a. Property location
 - b. Year of construction
 - c. Unit square footage
 - d. Unit type based on number of bedrooms
 - e. Load occupancy based on number of bedrooms
 - f. Building type
 - g. Construction materials
 - h. Wall/ceiling insulation
 - i. Type/size of HVAC, appliances and water heaters
 - j. HVAC SEER rating
 - k. Heating Degree Days

- l. Cooling Degree Days
 - m. Outdoor Design Temperature (DeltaT)
 - n. Indoor Design Temperature
 - o. Heating Season Hours
 - p. Degree Day Zone
 - q. United States Climatology Normals, Heating Degree Days
 - r. United States Climatology Normals, Cooling Degree Days
 - s. United States Climatology Climate Data (heating season hours, degree day zones)
5. The above utility allowances are only an estimate.
6. The above utility allowances, by bedroom type, apply to all building configurations on this property.

[Redacted]

Sincerely yours,

[Redacted]

[Redacted]

[Redacted]

Sample, Not for actual use

TEXAS ENERGY CONSUMPTION MODEL DATA WORKSHEET**PROPERTY****Pandora Springs**

Engineering firm Working with		
Engineer Assigned		
License #		Expires 12/31/2023
Licensed Mechanical Engineer as Required by TDHCA?	YES, Resume Included with Study	

GENERAL PROPERTY INFORMATION

Name	Pandora Springs
Address	221 East 11th Street
City	Austin
State	TX
Zip Code	78711
Year of Construction Completion/Initial Occupancy	2019

BUILDING INFORMATION

	<u>Apts 5+</u>	<u>Duplex -4 Units</u>	<u>SFR</u>
Building Type(s)	x		
Number of Resident Buildings/Stories per Building	5 buildings / 2 stories		
OTHER	N/A		
Separate Clubhouse Building	Yes		
Additional Information	N/A		

UNIT MIX

	<u>0BR</u>	<u>1BR</u>	<u>2BR</u>	<u>3BR</u>	<u>4BR</u>
Number of LIHTC / Other Units	0	26 / 2	53 / 1	0	0
Square Footage LIHTC Units		700	900		
Total LIHTC / Other Units		79 / 3			
Unit Mix Verification	Other				

UNIT UTILITY CONFIGURATION	Type	Resident Paid	Property Paid
Heating	Electric	x	
Cooking	Electric	x	
Other Electric	Electric	x	
Air Conditioning	Electric	x	
Water Heating	Electric	x	
Water	W		x
Sewer	S		x
Trash	T		x

ENERGY SAVING BUILDING COMPONENTS	Info.	Yes	No
SEER Rating for HVAC	14		
Thermal Pane Windows			x
Radiant Barrier Roof Sheathing			x
Ceiling Insulation Greater Than R-30		x	
2x6 Exterior Walls			x
Ceiling Fans in Livingroom			x
Ceiling Fans in Bedrooms			x
Energy Star Appliances		x	
High Efficiency / LED Lighting		x	
Water Saver Toilets		x	
Water Saving Devices (faucets, showers)		x	
OTHER			
OTHER			
OTHER			
OTHER			
OTHER			

UTILITY SERVICE for PROPERTY	
Zip Code	78711
Electric, Deregulated or Regulated?	Deregulated
If Deregulated, TDU Service Area	CenterPoint
If Deregulated, verified at http://www.powertochoose.org ?	Yes
Provider Used for Study	Amigo Energy
Date Rates Verified	02/26/23
Natural Gas	N/A, no resident paid gas
Service Territory	N/A
Date Rates Verified	N/A
Water	N/A, property paid
Date Rates Verified	N/A
Sewer	N/A, property paid
Date Rates Verified	N/A
Trash	N/A, property paid
Date Rates Verified	N/A

CLIMATE DATA	
Heating Degree Days, NOAA Climate Division	TX: Austin
Cooling Degree Days, NOAA Climate Division	TX: Austin
Heating Degree Day Zone	1.12
Heating Season Hours	1740
Outdoor Design Temperature	27
Design Temperature Differential	45

Electricity Facts Label (EFL)
Amigo Energy - Fixed Rate Product: PTC Autopay Plan - 3
For Service Area: CenterPoint Energy
Date: 2/26/2023

Electricity Price (Residential)	Average monthly use:	500 kWh	1000 kWh	2000 kWh
	Average price per kilowatt-hour:	11.4¢	10.9¢	10.7¢
	The average price per kWh is based on the usage levels shown above and includes the following components of the price:			
	<ul style="list-style-type: none"> • Energy Charge: 6.7¢/kWh • Pass-Through TDSP Distribution Charge: 3.7332¢/kWh • Pass-Through TDSP Customer Charge: \$4.39 per month • Market Securitization Debt Financing (Default): 0.00274 ¢/kWh • Market Securitization Debt Financing (Uplift): 0.05937 ¢/kWh <p>Market Securitization Debt Financing (Default) and (Uplift) may change during the contract term.</p> <p>Your average price for electric service will vary according to your monthly usage. The average price per kWh does not include JustGreen charge.</p> <p>The price does not include federal, state, or local sales taxes or fees, reimbursement for the state miscellaneous gross receipts tax, other government charges, or all other non-recurring fees. Some locations may be subject to a TDSP Underground Facilities and Cost Recovery Charge authorized by their city that is not included in the total average price shown. For more details, see the TDSP service tariff for a listing of cities and authorized charges.</p>			
Other Key Terms and Questions	See Terms of Service statement for a full listing of fees, deposit policy, and other terms			
Disclosure Chart	Type of Product	Fixed Rate Product		
	Contract Term	3 Months		
	Do I have a termination fee or any fees associated with terminating service?	Yes. The exit fee is \$175.		
	Can my price change during contract period?	Yes, but only in the limited circumstances described below.		
	If my price can change, how will it change and by how much?	Your price can change to reflect changes in TDU charges, changes to the ERCOT or Texas Regional Entity administrative fees charged to loads or changes resulting from federal, state, or local laws that impose new or modified fees that are beyond our control.		
	What other fees may I be charged?	Disconnection Fee: \$20. Disconnection Notice Fee: \$22. Insufficient Funds Charge: \$25. Late Fee: 5% of your late bill's past due amount. Manual Payment Fee: \$5 each time a payment processed manually through a customer service agent, automated phone system, or a self-service web portal See the "Additional Charges and Fees" and "JustGreen Product" section of Terms of Service for more details.		
	Is this a pre-pay or pay in advance product?	No		
	Does the REP purchase excess distributed renewable generation?	Yes		
Renewable Content	26.3%			
The statewide average for renewable content is:	31.1%			

<p>Fulcrum Retail Energy LLC d/b/a Amigo Energy P.O. BOX 3607, Houston, TX 77253 www.AmigoEnergy.com PUCT License # 10081</p>	<p>CustomerSupport@Amigoenergy.com Monday – Friday: 8AM – 7PM CST, Saturday: 9AM – 6PM CST Phone: 1-888-469-2644 Fax: 1-888-548-7690</p>
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PE+LS

Texas Board of Professional
Engineers and Land Surveyors



Expires: 12/31/2023



Texas Licensed Professional Engineer



Signature

Utility Allowance: Actual Use Methodology

Actual Use Methodology

- This is an allowance based on an average of the actual use of similarly constructed and sized units in the building using actual utility data and Component Charges.
- Upon receipt of the required information, the Department will determine if the owner has provided the minimum information necessary to calculate using this methodology, the Department will communicate with the development to obtain missing information/documentation.
- The Department will complete its evaluation and calculation within 45 days of receipt of all information requested.
- The update and all back-up documentation must be submitted to the Department no later than August 1st of each year; however, owners are encouraged to submit prior to the deadline.
- Once the Department issues the response the development must then post to the residents on the date that the Department issues the response.

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Utility Allowance: Actual Use Methodology

What must be provided:

- A minimum sample size of usage data for at least five continuously occupied units of each unit type or 20% of each unit type; whichever is greater. If there are less than five units of any unit type, data for 100% of the unit type must be provided.
- Upload the following documents into the development's CMTS account using data no older than 60 days prior to the 90-day implementation period intended.
 - An Excel spreadsheet listing each unit used for the sample size, unit number, number of bedrooms, bathrooms and square footage, household's move-in date, utility usage for each month for the 12-month period, and the Component Charges in place at the time of the submission.
 - All documentation obtained from the Utility Provider and/or copies of the actual utility bills.
 - Rent Roll showing occupancy as of the end of the month for the month in which the data was requested from the provider.
 - Documentation of the current UA used by the development.

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Utility Allowance: Actual Use Methodology

RENT ROLL FORM

Manager's Name: _____ Unit #: _____

Phone: _____

Type of Space	Tenant Name	Total Area (Square Feet)	Number/Period	Moving Date	Lease Start & End Date	Accommodation Detail	Request Description

Utility Allowance Questionnaire

This form must be completed by all owners requesting to switch utility allowance methodologies and when submitting an allowance for annual review. Please contact Cara Pollei with any questions at (512) 475-3821 or

CA
TR
"T"
me
All

1 Bedroom Electricity Usage

Unit #	Meter number	Move-In Date	Aug. 2019	Sept. 2019	Oct. 2019	Nov. 2019	
1	726	50078242	7/13/2016	168	314	154	10
2	1038	46346066	5/1/2013	159	183	186	14
3	1141	43521422	5/31/2019	281	301	275	21
4	1349	46346057	2/1/2012	319	193	305	19
5	624	46346070	1/1/2012	273	342	334	23
6	1765	43520447	11/2/2015	276	333	284	22

PCRF -0.003665
customer charge of \$15.00
energy charge of \$0.099 per KWH

April 2020	May 2020	June 2020	July 2020	Annual Usage
293	253	132	142	4506
442	398	524	501	6474
435	487	466	269	6394
523	473	463	574	7341
634	575	634	648	8167
Total KWH				32882
5 units X 12 months				60
Average KWH per unit				548.03
Avg Energy Charge				\$67.25
State Tax				\$4.20
City Tax				\$1.34
Avg Monthly Charge				\$72.79

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Utility Allowance: Actual Use Methodology

How the Department will review:

- If the submission contains all required documentation and information, the Department shall calculate the UA for each bedroom size using the guidelines described below:
 - If data is obtained for more than the sample requirement for the unit type, **all** data will be used to calculate the allowance.
 - If more than 12 months of data is provided for any unit, only the data for the **most current** 12 months will be averaged.
 - The allowance will be calculated by multiplying the average units of measure for the applicable utility for all unit types with that bedroom size.
 - The allowance will be rounded up to the next whole dollar amount.
 - If allowances are calculated for different utilities, each amount will be rounded up to the next whole dollar amount and then added together for the total allowance.
 - If the data submitted indicates zero usage for any month, the data for that unit will not be used to calculate the UA.

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Utility Allowance: Actual Use Methodology


TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS
www.tdhca.state.tx.us

Boonyi Meevann
S.B. Goodwin, Chair
Leifla Engelman-Eckhardt, Vice Chair
Paul A. Bradley, Member
Andrew Headright, Member
Sharon Thompson, Member
Van Velspeelt, Member

April 26, 2020

Writer's direct phone # (512) 475-3823
Email: carapollie@tdhca.state.tx.us

Nicole Martinez
M Street Housing, LP
Austin, TX
nicole@Mstreet.org

RE: M Street Apartments CMTS ID: 1026

Dear Ms. Martinez:

The Texas Department of Housing and Community Affairs (Department) has received the request submitted on March 25, 2020 and April 24, 2020, by M Street Housing, for M Street Apartments to calculate the water and sewer portion of the utility allowance using the Actual Use Method as described in 10TAC§10.614(f)(3)(E).

Your request is hereby granted. This approval is based on the following representations: (1) that the residents are financially responsible for electricity, gas, water and sewer and that the utilities are not paid to or through the owner of the building based on an allocation formula or RUBS; and (2) that the buildings are not Rural Housing Services (RHS) buildings. Please note that the utility allowance for those units occupied by Section 8 voucher holders remains the applicable Public Housing Authority utility allowance established from where the resident receives the assistance.

In accordance with 10TAC§10.614(f)(3), receipt of approval from the Department will begin the ninety (90) day period after which the new utility allowance must be used to compute gross rent. Upon receipt of this approval, Notice to the Residents must be posted in common area of the leasing office of the development. Please note that a resident of the development could contact the Department with additional information during the ninety (90) day notification period. If the information is relevant, the Department may contact the owner and request additional documentation. *The following allowances are effective for rent due after July 27, 2020:*

221 East 11th Street P.O. Box 13941 Austin, Texas 78711-3941 (800) 525-0657 (512) 475-3800

	Water (Actual Use)
1 Bedroom	\$12.00
2 Bedroom	\$18.00
3 Bedroom	\$22.00
	Sewer
1 Bedroom	\$18.00
2 Bedroom	\$30.00
3 Bedroom	\$36.00

Please be advised that Owners must update the allowance once a calendar year. In accordance with 10TAC§10.614(f)(5), the update and all back up documentation required by the method must be submitted to the Department no later than August 1st of each year but are encouraged to submit prior to the deadline to ensure the Department has time to review.

If you have any further questions, please contact Cara Pollie at (512) 475-3821 or via email: carapollie@tdhca.state.tx.us.

Sincerely,

Cara Pollie
Compliance Monitor

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Utility Allowance: HUD Utility Schedule Model

HUD Utility Schedule Model (HUSM) Method

- The HUD Model and related resources can be found at <http://www.huduser.gov/portal/resources/utilallowance.html>.
 - Each item on the schedule must be displayed out two decimal places. The total allowance must be rounded up to the next whole dollar amount.
- The component charges used can be no older than those in effect 60 days prior to the beginning of the 90-day period described in §10.614(f)(3) related to effective dates.
- The beginning of the 90-day notification period is the date entered as “Form Date” on the HUD Model.
- The allowance must be calculated using the MS Excel version available at the URL above, with no changes or adjustments made other than entry of the required information needed to complete the model.

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Utility Allowance: HUD Utility Schedule Model

HUD Utility Schedule Model (HUSM) Method continued

- In the event that the Zip Code or PHA Code for the local PHA to the development is not listed in the “Location” of the workbook, the Department will use the PHA code for the PHA that is closest in distance to the development.
- If the owner elects any of the Green Discount options for a development, documentation to evidence that the units and the buildings meet the Green Discount standard as prescribed in the model is required for the initial approval and every subsequent annual review.
- Do not take into consideration any costs or credits that a consumer would incur because of their actual usage.
- During the annual review the Department will complete a HUD Model and issue an approval, partial approval or denial. The HUD Model will be attached to the approval letter.

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Utility Allowance: HUD Utility Schedule Model

“Location” Tab of HUD Model

- Enter the Zip Code of the development, if the Zip Code is not available, enter the PHA Code; which can be found at https://www.hud.gov/sites/dfiles/PIH/documents/PHA_Contact_Report_TX.pdf
- Enter the property name in the next box for “Name of Housing Authority/City”
- State should remain TX
- Enter the date that you are preparing the HUD Model as the “Form Date”

The Climate Data will automatically populate based on the zip code or PHA code that is entered in the first box of this tab. The data in this section should not be changed or edited for any reason.

General Information		
PHA/Zip Code* Lookup		77027
Name of Housing Authority/City		Houston
State		TX
Form Date		December 7, 2020
Include Allowance for Air Conditioning <input type="checkbox"/>		
Climate Data (Degree Days)		
HDD Jan		368 required
HDD Feb		247 required
HDD Mar		117 required
HDD Apr		25 required
HDD May		0 required
HDD Jun		0 required
HDD Jul		0 required
HDD Aug		0 required
HDD Sep		0 required
HDD Oct		22 required
HDD Nov		135 required
HDD Dec		322 required
HDD Annual		1237

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Utility Allowance: HUD Utility Schedule Model

To Obtain the Rates for the area when deregulated:

- Visit <http://powertochoose.com/en-us> and enter the zip code
 - If no plans are available then the rates must be obtained from the provider for the area
- Click "View Results" and select the plan to be used for the HUD Model
- Click "Fact Sheet" for the desired plan, this will need to be submitted with the HUD Model for review

The screenshot shows the PowerToChoose website interface. On the left, the search page prompts the user to enter a zip code (77027) and shows 185 plans found. A large arrow points from the search input to the results page. On the right, the results page displays several plans from 'just energy'. One plan, 'Sustainable Living Bundle', is highlighted with a price of 6.9¢/kWh. An arrow points to the 'Fact Sheet' link for this plan. Another plan, 'Autopay PTC Plan', is also highlighted with a price of 6.9¢/kWh. The interface includes filters for 'Price/kWh', 'Contract Length', and 'Pricing and Billing'.

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Utility Allowance: HUD Utility Schedule Model

Electricity Facts Label (EFL) Just Energy - Fixed Rate Product: Sustainable Living Bundle - 4 For Service Area: CenterPoint Energy 12/7/2020																								
Average monthly use:	500 kWh	1000 kWh	2000 kWh																					
Average price per kilowatt-hour, December, 2020	7.4¢	6.8¢	6.5¢																					
Electricity Price (Residential)	The average price per kWh is based on the usage levels shown above and includes the following components of the price: • Energy Charge: 2¢/kWh • Pass-Through TDSP Distribution Charge: 4.2359¢/kWh • Pass-Through TDSP Customer Charge: \$4.39 • One-time terrapass™ set up and carbon offset purchase: \$14.99. For purposes of this EFL, 1/12 of this set up cost is included in the average prices above. Your average price for electric service will vary according to your monthly usage. The one-time terrapass setup and carbon offset purchase is required to enroll on this product. This \$14.99 set up fee includes terrapass account set up and 1 metric ton of carbon offsets; however, the subscription and set up fee will be charged separately by terrapass. A customer interested in continuing to offset his or her carbon footprint will have the option to enroll in a terrapass subscription separately from this product. For more information, visit https://www.terrapass.com/individual/sustainable-living . The average price per kWh does not include JustGreen. JustGreen is an optional program that offsets electricity usage with renewable energy credits for 100% renewable content. While it is not common, some renewable projects could be part of both terrapass and JustGreen. JustGreen renewable energy credits may overlap with terrapass. The price does not include federal, state, or local sales taxes or fees, reimbursement for the state miscellaneous gross receipts tax, other government charges, or all other non-recurring fees. Some locations may be subject to a TDSP Underground Facilities and Cost Recovery Charge authorized by their city that is not included in the total average price shown. For more details, see the TDSP service tariff for a listing of cities and authorized charges.																							
Other Keys and Terms and Questions	See Terms of Service statement for a full listing of fees, deposit policy, and other terms.																							
Disclosure Chart	<table border="1"> <tr> <td>Type of Product</td> <td>Fixed Rate</td> </tr> <tr> <td>Contract Term</td> <td>4 Month</td> </tr> <tr> <td>Do I have a termination fee or any fees associated with remaining services?</td> <td>Yes: Termination Fee</td> </tr> <tr> <td>Can my price change during the contract period?</td> <td>Yes, but only if the price changes less than 10% from the current rate.</td> </tr> <tr> <td>If my price can change, how will it change and by how much?</td> <td>Your price will change by no more than 10% from the current rate.</td> </tr> <tr> <td>What other fees may I be charged?</td> <td>Fee: \$13 Charge: \$4.39 by TDSP Terms</td> </tr> <tr> <td>Is this a pre-pay or pay in advance product?</td> <td>No</td> </tr> <tr> <td>Does the REP purchase excess distributed renewable generation?</td> <td>Yes</td> </tr> <tr> <td>Renewable Content</td> <td>12.4%</td> </tr> <tr> <td>The statewide average for renewable content is</td> <td>20.7%</td> </tr> </table>				Type of Product	Fixed Rate	Contract Term	4 Month	Do I have a termination fee or any fees associated with remaining services?	Yes: Termination Fee	Can my price change during the contract period?	Yes, but only if the price changes less than 10% from the current rate.	If my price can change, how will it change and by how much?	Your price will change by no more than 10% from the current rate.	What other fees may I be charged?	Fee: \$13 Charge: \$4.39 by TDSP Terms	Is this a pre-pay or pay in advance product?	No	Does the REP purchase excess distributed renewable generation?	Yes	Renewable Content	12.4%	The statewide average for renewable content is	20.7%
Type of Product	Fixed Rate																							
Contract Term	4 Month																							
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Does the REP purchase excess distributed renewable generation?	Yes																							
Renewable Content	12.4%																							
The statewide average for renewable content is	20.7%																							
Just Energy, Texas L.P. d/b/a Just Energy P.O. Box 460008, Houston, Texas 77056 www.JustEnergy.com (866) 311-6614 PUCT License # 10022 Monday - Friday: 8:00 am to 8:00 pm CST Saturday: 8:00 am to 6:00 pm CST																								

- ### Electricity Facts Label (EFL)
- This data will be used on the "Tariffs" tab of the HUD Model
 - If the TDSP pass-through charges are not on the EFL chosen, those must be obtained from TDSP
 - If there is not an effective date the EFL cannot be used for the HUD Model

Electricity Facts Label (EFL) Just Energy - Fixed Rate Product: Sustainable Living Bundle - 4 For Service Area: CenterPoint Energy 12/7/2020			
Average monthly use:	500 kWh	1000 kWh	2000 kWh
Average price per kilowatt-hour, December, 2020	7.4¢	6.8¢	6.5¢
The average price per kWh is based on the usage levels shown above and includes the following components of the price: • Energy Charge: 2¢/kWh • Pass-Through TDSP Distribution Charge: 4.2359¢/kWh • Pass-Through TDSP Customer Charge: \$4.39 • One-time terrapass™ set up and carbon offset purchase: \$14.99. For purposes of this EFL, 1/12 of this set up cost is included in the average prices above.			

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Utility Allowance: HUD Utility Schedule Model

<https://www.puc.texas.gov/industry/electric/rates/tdr.aspx>

Public Utility Commission of Texas

Home Consumer Industry Rules & Laws Filings Agency

Electric > Industry Information > Electricity > Rates and Tariffs > Tariffs for Service

Transmission and Distribution Rates for Investor Owned Utilities

Tariffs for Service

Transmission and Distribution Utilities (TDUs) must offer access to their wires to all REPs on a non-discriminatory basis under standard terms and conditions adopted by the Commission.

These areas are open to full retail competition as of January 1, 2002, and these TDUs charge the below rates to REPs.

Tariffs will only be updated twice a year (after the March and September TCRF filings) except in the event of a Final Order in a major rate case. The Summary of Non-Bypassable Charges (linked below) will be updated more frequently, but not on any set schedule.

Compliance Docket - Utility
48401 - TNMP
46057 - Oncor Electric Delivery Company
35093 - AEP Texas Central Division
33310 - AEP Texas North Division
49421 - CenterPoint

The utility area below is not currently open to full retail competition until the Commission finds that the area is ready for below rates during the ongoing pilot project.

Effective for Extended Pilot Project
UCOS Compliance Docket - Utility
23924 - SHERPCO

Summary of Current Commission-Approved Charges for ERCOT TDUs as of March 1, 2020. (PLEASE NOTE: THESE MAY NOT BE THE MOST CURRENT TDU CHARGES, AND MAY NOT INCLUDE ALL TDU CHARGES IN EFFECT. RETAIL ELECTRIC PROVIDERS SHOULD NOT RELY UPON THIS INFORMATION IN COMPLYING ELECTRICITY FACTS LABELS, RATES.)

Archived TDU Rates Summaries

The link will take you to a report that is 8 pages long, you will need to go to the last page to get the totals for your area. This is only necessary if the EFL that you select from the Power to Choose website does not already list the TDU charges. The information you need, as shown below, is the Total Delivery Rate and the Monthly Customer Charges. These will be input as the Monthly Charge and Extra Charges on the Tariff Tab of the HUD Model.

Public Utility Commission of Texas
Updated: March 1, 2020

Schedule Commission-7

RESIDENTIAL DELIVERY CHARGES--Total Monthly Bill Amount per 1,000 kWh

	Oncor	CenterPoint	AEP Central	AEP North	TNMP
Total Delivery Rate (per kWh)	\$0.035271	\$0.034485	\$0.042286	\$0.035805	\$0.041194
Total kWh charges per 1,000 kWh	\$35.27	\$34.49	\$42.29	\$35.81	\$41.19
Monthly Customer Charges (\$\$)	\$3.42	\$5.47	\$4.79	\$4.79	\$7.85
Total Residential Delivery Charges (1,000 kWh)	\$38.69	\$39.96	\$47.08	\$40.60	\$49.04

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Utility Allowance: HUD Utility Schedule Model

"Tariffs" Tab of HUD Model

- Enter the date at the top under "Current"
- Utility Name (name of provider)
- Rate Name
- Rate Effective Date
- *For this example the rate is same all year; however, if there were different rates the summer start and end would need to be entered*
- Monthly Charge is the TDSP and provider monthly fee
- Size of blocks should correspond with the rate sheet
 - For this example there is only one rate block
- Cost of blocks will correspond with the rate sheet
 - For this example there is only one rate
- *For this example there is no winter/summer rate*
- Extra Charges are the TDSP and provider "extra" charges
- Taxes include the state electric tax, population tax and city tax (if the city charges)

Previous: July 31, 2015 | Current: December 7, 2020

Date Entered

Standard Electric Utility Tariff

Utility Name: Just Energy

Rate Name: Sustainable Living Bundle

Rate Effective Date: December 7, 2020

First Month of Summer: January | Last Month of Summer: December

Monthly Charge: 4.39 \$/month

Summer

Size of First Block: remainder kWh

Cost of First Block: 0.02 \$/kWh

Winter

Size of First Block: kWh

Cost of First Block: \$/kWh

Extra Charges: 0.042359 \$/kWh

Taxes: 3.1637 %

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Utility Allowance: HUD Utility Schedule Model

Electricity Facts Label (EFL) Just Energy - Fixed Rate Product: Sustainable Living Bundle - 4 For Service Area: CenterPoint Energy 12/7/2020			
Average monthly use:	500 kWh	1000 kWh	2000 kWh
Average price per kilowatt-hour, December, 2020	7.4¢	6.8¢	6.5¢
Electricity Price (Residential)	<p>The average price per kWh is based on the usage levels shown above and includes the following components of the price of Energy Charge: 2¢/kWh</p> <ul style="list-style-type: none"> Pass-Through TDSF Distribution Charge 4.215¢/kWh Pass-Through TDSF Customer Charge \$4.19 One-time terrapass™ set up and carbon offset purchase: \$14.99. For purposes of this EFL, 1/12 of this set up cost is included in the average prices above. <p>Your average price for electric service will vary according to your monthly usage.</p> <p>The one-time terrapass setup and carbon offset purchase is required to enroll on this product. This \$14.99 set up fee includes terrapass account set up and 1 metric ton of carbon offsets; however, the subscription and set up will be charged separately by terrapass. A customer interested in continuing to offset his or her carbon footprint will have the option to enroll in a terrapass subscription separately from this product. For more information, visit https://www.terrapass.com/individuals/sustainable-living.</p> <p>The average price per kWh does not include JustGreen. JustGreen is an optional program that offsets electricity usage with renewable energy credits for 100% renewable content. While it is not common, some renewable projects could be part of both terrapass and JustGreen. JustGreen renewable energy credits may overlap with terrapass.</p> <p>The price does not include federal, state, or local sales taxes or fees, reimbursements for the state miscellaneous gross receipts tax, other government charges, or all other non-recurring fees. Some locations may be subject to a TDSF Underground Facilities and Cost Recovery Charge authorized by their city that is not included in the total average price shown. For more details, see the TDSF service tariff for a listing of cities and authorized charges.</p>		
Other Keys and Terms and Questions	<p>See Terms of Service statement for a full listing of fees, deposit policy, and other terms</p> <p>Type of Product: Fixed Rate Product</p> <p>Contract Term: 4 Months</p> <p>Do I have a termination fee or any fees associated with terminating service? Yes. The Exit fee is \$175 per ESID.</p> <p>Can my price change during the contract period? Yes, but only in the limited circumstances described below.</p> <p>If my price can change, how will it change and by how much? Your price can change to reflect changes in TDU charges, changes to the ERCOT or Texas Regional Entity administrative fees charged to loads or changes resulting from federal, state, or local laws that impose new or modified fees or costs on Just Energy that are beyond our control.</p> <p>What other fees may I be charged? Fees not included in above price: Agent Assist Fee: \$5 each time a customer service agent helps you make a payment. Disconnection Fee: \$25. Disconnection Notice Fee: \$20. Insufficient Funds Charge: \$25. Late Fee: 5% of your late bill 1st due date amount. Please See TOS for additional information regarding fees charged by TDSF. JustGreen: Please see "JE JustGreen" section in your Terms of Service for more details.</p> <p>Is this a pre-pay or pay in advance product? No</p> <p>Does the EEP purchase excess distributed renewable generation? Yes</p> <p>Renewable Content: 12.4%</p> <p>The statewide average for renewable content is: 20.7%</p> <p>Just Energy Texas L.P. d/b/a Just Energy P.O. Box 460008, Houston, Texas 77056 www.JustEnergy.com (866)-387-8674 P.U.C.T. License # 10052</p> <p>Monday - Friday: 8:00 am to 8:00 pm CST Saturday: 8:00 am to 6:00 pm CST</p>		

	Previous July 31, 2015	Current December 7, 2020
Standard Electric Utility Tariff		
Utility Name	Just Energy	
Rate Name	Sustainable Living Bundle 4	
Rate Effective Date	December 7, 2020	
First Month of Summer	January	January
Last Month of Summer	December	December
Monthly Charge		4.39 \$/month
Summer		
Size of First Block		remainder kWh
Size of Second Block		kWh
Size of Third Block		kWh
Size of Fourth Block		kWh
Cost of First Block		0.02 \$/kWh
Cost of Second Block		\$/kWh
Cost of Third Block		\$/kWh
Cost of Fourth Block		\$/kWh
Winter		
Size of First Block		kWh
Size of Second Block		kWh
Size of Third Block		kWh
Size of Fourth Block		kWh
Cost of First Block		\$/kWh
Cost of Second Block		\$/kWh
Cost of Third Block		\$/kWh
Cost of Fourth Block		\$/kWh
Extra Charges		0.042359 \$/kWh
Taxes		3.1637 %

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Utility Allowance: HUD Utility Schedule Model

CENTERPOINT ENERGY RESOURCES CORP. DBA CENTERPOINT ENERGY TEXAS AND CENTERPOINT ENERGY TEXAS GAS HOUSTON DIVISION - INCORPORATED RATE SHEET RESIDENTIAL SERVICE RATE SCHEDULE NO. R-2095-I-GRIP 2020	
APPLICATION OF SCHEDULE	
This schedule is applicable to any customer in an incorporated area including a city that has ceded jurisdiction to the Commission in the Houston Division to whom service is supplied as a single private dwelling unit and its appurtenances, the usage use of which is for household appliances, and for the personal comfort and convenience of those residing therein.	
Natural gas supplied hereunder is for the individual use of the customer at one point of delivery and shall not be resold or shared with others.	
MONTHLY RATE	
For bills rendered on and after the effective date of this rate schedule, the monthly rate for each customer receiving service under this rate schedule shall be the sum of the following:	
MONTHLY RATE	
For bills rendered on and after the effective date of this rate schedule, the monthly rate for each customer receiving service under this rate schedule shall be the sum of the following:	
(a) The Base Rate consisting of:	
(1) Customer Charge -- \$17.39 ¹	Houston-Contrco (14.95 Pressure Base)(PGA)
(2) Commodity Charge -- All Ccf \$0.07196 ²	Houston-Contrco (14.95 Pressure Base)(Storage)
	Houston-Contrco (14.95 Pressure Base)(Total Filed with RRC)
(b) Tax Adjustment -- The Tax Adjustment will be calculated and adjusted periodically as defined in the Company's applicable Tax Adjustment Rate Schedule and Franchise Fee Adjustment Rate Schedule.	November-20
(c) Gas Cost Adjustment -- The applicable Purchased Gas Adjustment (PGA) Rate -- as calculated on a per Ccf basis and adjusted periodically under the applicable Purchased Gas Adjustment (PGA) Rate Schedule -- for all gas used.	R-2095-I-GRIP 2020 & R-2095-U-GRIP 2020
(d) Rate Case Expense Recovery -- Rate Case Expense Recovery will be calculated and adjusted periodically as defined in the Company's applicable Rate Case Expense Recovery Rate Schedule.	\$0.47587/Ccf
	\$0.00163/Ccf
	\$0.47750/Ccf

Natural Gas Services

- This data will be used on the "Tariffs" tab of the HUD Model
- Obtain the rates from the Natural Gas provider's website
- Include all charges that would be present on the tenant's utility bill

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Utility Allowance: HUD Utility Schedule Model

“Tariffs” Tab of HUD Model

- Utility Name (name of provider)
- Rate Name
- Rate Effective Date
- Measurement Units – select based on the rate plan
- *For this example the rate is same all year; however, if there were different rates the summer start and end would need to be entered*
- Monthly Charge is the Customer Charge
- Size of blocks should correspond with the rate sheet
 - For this example there is only one rate block
- Cost of blocks will correspond with the rate sheet
 - For this example there is only one rate
- *For this example there is no winter/summer rate*
- Extra Charges are the additional charges outlined on the rate sheet
- Taxes include the state gas tax, population tax and city tax (if the city charges)

Standard Natural Gas Utility Tariff

Utility Name	<input type="text" value="Centerpoint Energy"/>
Rate Name	<input type="text" value="Residential"/>
Rate Effective Date	<input type="text" value="December 10, 2020"/>
Measurement Units	<input type="text" value="CCF"/> 2
First Month of Summer	<input type="text" value="January"/> 1
Last Month of Summer	<input type="text" value="December"/> 12
Monthly Charge	<input type="text" value="17.39"/> \$/month
Summer	
Size of First Block	<input type="text" value="remainder"/> CCF
Size of Second Block	<input type="text"/> CCF
Size of Third Block	<input type="text"/> CCF
Size of Fourth Block	<input type="text"/> CCF
Cost of First Block	<input type="text" value="0.07196"/> \$/CCF
Cost of Second Block	<input type="text"/> \$/CCF
Cost of Third Block	<input type="text"/> \$/CCF
Cost of Fourth Block	<input type="text"/> \$/CCF
Winter	
Size of First Block	<input type="text"/> CCF
Size of Second Block	<input type="text"/> CCF
Size of Third Block	<input type="text"/> CCF
Size of Fourth Block	<input type="text"/> CCF
Cost of First Block	<input type="text"/> \$/CCF
Cost of Second Block	<input type="text"/> \$/CCF
Cost of Third Block	<input type="text"/> \$/CCF
Cost of Fourth Block	<input type="text"/> \$/CCF
Extra Charges	<input type="text" value="0.4775"/> \$/CCF
Taxes	<input type="text" value="3.1637"/> %

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Utility Allowance: HUD Utility Schedule Model

MONTHLY RATE

For bills rendered on and after the effective date of this rate schedule, the monthly rate for each customer receiving service under this rate schedule shall be the sum of the following:

(a) The Base Rate consisting of:

- (1) Customer Charge -- \$17.39¹
- (2) Commodity Charge -- All Ccf \$0.07196²

(b) Tax Adjustment – The Tax Adjustment will be calculated and adjusted periodically as defined in the Company’s applicable Tax Adjustment Rate Schedule and Franchise Fee Adjustment Rate Schedule.

(c) Gas Cost Adjustment – The applicable Purchased Gas Adjustment (PGA) Rate – as calculated on a per Ccf basis and adjusted periodically under the applicable Purchased Gas Adjustment (PGA) Rate Schedule – for all gas used.

(d) Rate Case Expense Recovery – Rate Case Expense Recovery will be calculated and adjusted periodically as defined in the Company’s applicable Rate Case Expense Recovery Rate Schedule.

		R-2095-I-GRIP 2020 & R-2095-U-GRIP 2020
Houston-Contrco (14.95 Pressure Base)(PGA)	November-20	\$0.47587/Ccf
Houston-Contrco (14.95 Pressure Base)(Storage)		\$0.00163/Ccf
Houston-Contrco (14.95 Pressure Base)(Total Filed with RRC)		\$0.47750/Ccf

Standard Natural Gas Utility Tariff

Utility Name	<input type="text" value="Centerpoint Energy"/>
Rate Name	<input type="text" value="Residential"/>
Rate Effective Date	<input type="text" value="December 10, 2020"/>
Measurement Units	<input type="text" value="CCF"/> 2
First Month of Summer	<input type="text" value="January"/> 1
Last Month of Summer	<input type="text" value="December"/> 12
Monthly Charge	<input type="text" value="17.39"/> \$/month
Summer	
Size of First Block	<input type="text" value="remainder"/> CCF
Size of Second Block	<input type="text"/> CCF
Size of Third Block	<input type="text"/> CCF
Size of Fourth Block	<input type="text"/> CCF
Cost of First Block	<input type="text" value="0.07196"/> \$/CCF
Cost of Second Block	<input type="text"/> \$/CCF
Cost of Third Block	<input type="text"/> \$/CCF
Cost of Fourth Block	<input type="text"/> \$/CCF
Winter	
Size of First Block	<input type="text"/> CCF
Size of Second Block	<input type="text"/> CCF
Size of Third Block	<input type="text"/> CCF
Size of Fourth Block	<input type="text"/> CCF
Cost of First Block	<input type="text"/> \$/CCF
Cost of Second Block	<input type="text"/> \$/CCF
Cost of Third Block	<input type="text"/> \$/CCF
Cost of Fourth Block	<input type="text"/> \$/CCF
Extra Charges	<input type="text" value="0.4775"/> \$/CCF
Taxes	<input type="text" value="3.1637"/> %

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Utility Allowance: HUD Utility Schedule Model

Multi-Family –TU 14-19:

- 14 (duplex – 2 units)
- 15 (tri-plex – 3 units)
- 16 (quad-plex – 4 units)
- 17 (master-metered townhomes – any number of units)
- 18 (apartments — 5+ units)
- 19 (trailer parks)

Consumption is no longer included with the basic charge. The volume charges are applied to all usage.

Rate	Meter size (Inches)	Basic Water Charge	Basic Sewer Charge
Basic Charge (0 consumption)	5/8	\$5.96	\$10.48
	¾	\$6.14	\$10.48
	1	\$7.39	\$11.01
	1.5	\$11.18	\$12.76
	2	\$13.16	\$13.29
	3	\$34.83	\$23.81
	4	\$47.47	\$26.97
	6	\$81.37	\$38.54
	8	\$212.45	\$93.60
	10	\$212.45	\$113.76
Volume Charge	All	+ \$4.58 per 1,000 gallons	+ \$6.66 per 1,000 gallons

Water & Sewer Supply Tariffs

- This data will be used on the “Tariffs” tab
- Obtain the rates from the water/sewer provider’s website
- Include all charges that would be present on the tenant’s utility bill
- Use the smallest meter size, unless you can evidence a different sized meter and how the meter is shared

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Utility Allowance: HUD Utility Schedule Model

“Tariffs” Tab of HUD Model

- Utility Name (name of provider)
- Rate Effective Date
- Measurement Units – select based on the rate plan
- Monthly Charge is the Base Charge for Water
- Size of blocks should correspond with the rate sheet
 - For this example there is only one rate block
- Cost of blocks will correspond with the rate sheet
 - For this example there is only one rate
- Extra Charges are the additional charges outlined on the rate sheet; this example does not have any
- Taxes are generally not charged on water/sewer
- Since water is billed on a “per 1,000 gallons” the rates must be converted into the appropriate amount. $\$4.58/1000 = .00458$ per gallon in this case

Water Supply Tariff			
Supplier Name	<input type="text"/>	<input type="text" value="City of Houston"/>	
Effective Date	<input type="text"/>	<input type="text" value="April 1, 2020"/>	
Measurement Units	<input type="text" value="Gallons"/>		
Monthly Charge	<input type="text"/>	<input type="text" value="5.96"/>	\$/month
Size of First Block	<input type="text"/>	<input type="text" value="remainder"/>	Gallons
Size of Second Block	<input type="text"/>		Gallons
Size of Third Block	<input type="text"/>		Gallons
Size of Fourth Block	<input type="text"/>		Gallons
Cost of First Block	<input type="text"/>	<input type="text" value="0.00458"/>	\$/Gallons
Cost of Second Block	<input type="text"/>		\$/Gallons
Cost of Third Block	<input type="text"/>		\$/Gallons
Cost of Fourth Block	<input type="text"/>		\$/Gallons
Extra Charges	<input type="text"/>	<input type="text"/>	\$/Gallons
Taxes	<input type="text"/>	<input type="text"/>	%

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Utility Allowance: HUD Utility Schedule Model

Multi-Family –TU 14-19:

- 14 (duplex – 2 units)
- 15 (tri-plex – 3 units)
- 16 (quad-plex – 4 units)
- 17 (master-metered townhomes – any number of units)
- 18 (apartments — 5+ units)
- 19 (trailer parks)

Consumption is no longer included with the basic charge. The volume charges are applied to all usage.

Rate	Meter size (Inches)	Basic Water Charge	Basic Sewer Charge
Basic Charge (0 consumption)	5/8	\$5.96	\$10.48
	¾	\$6.14	\$10.48
	1	\$7.39	\$11.01
	1.5	\$11.18	\$12.76
	2	\$13.16	\$13.29
	3	\$34.83	\$23.81
	4	\$47.47	\$26.97
	6	\$81.37	\$38.54
	8	\$212.45	\$93.60
	10	\$212.45	\$113.76
Volume Charge	All	+ \$4.58 per 1,000 gallons	+ \$6.66 per 1,000 gallons

Water & Sewer Supply Tariffs

- This data will be used on the “Tariffs” tab
- Obtain the rates from the water/sewer provider’s website
- Include all charges that would be present on the tenant’s utility bill
- Use the smallest meter size, unless you can evidence a different sized meter and how the meter is shared

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Utility Allowance: HUD Utility Schedule Model

“Tariffs” Tab of HUD Model

- Utility Name (name of provider)
- Rate Effective Date
- Measurement Units – select based on the rate plan
- Monthly Charge is the Base Charge for Sewer
- Size of blocks should correspond with the rate sheet
 - For this example there is only one rate block
- Cost of blocks will correspond with the rate sheet
 - For this example there is only one rate
- Extra Charges are the additional charges outlined on the rate sheet; this example does not have any
- Taxes are generally not charged on water/sewer
- Since sewer is billed on a “per 1,000 gallons” the rates must be converted into the appropriate amount. $\$6.66/1000 = .00666$ per gallon in this case

Sewer Tariff

Sewer Charge Included in Water Tariff FALSE

Sewer Service Name

Effective Date

Measurement Units

Monthly Charge \$/month

Size of First Block Gallons

Size of Second Block Gallons

Size of Third Block Gallons

Size of Fourth Block Gallons

Cost of First Block \$/Gallons

Cost of Second Block \$/Gallons

Cost of Third Block \$/Gallons

Cost of Fourth Block \$/Gallons

Extra Charges \$/Gallons

Taxes %

If the rates indicate that there is a “cap” for sewer charges, the Department will utilize the cap on the form for purposes of calculating sewer.

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Utility Allowance: HUD Utility Schedule Model

Building Characteristics

Unit Type: Larger Apartment Bldgs. (5+ units)

Schedule Type: Projected Allowance Schedule

Electric Tariff: Standard Electric Utility Tariff

Green Discount: None

*Choose LEED or ENERGY STAR if the building meets that certification.
Choose Significant Green Retrofit if the building had energy saving rehabilitation to any of the following systems in the last 5 years:
(1) heating, (2) cooling, (3) lighting, (4) DHW systems, (5) appliances, (6) building envelope, (7) water measures, and/or (8) on-site generation

Print the form shown below for the selected unit type
Projected Family Allowances To be used to compute specific family allowances.

Unit size: 0 BR

Utility or Service	Fuel Source
Space Heating	Electric Resistance
Cooking	Natural Gas
Other Electric	Electric
Air Conditioning	Electric
Water Heating	Natural Gas
Water	Tenant pays
Sewer	Tenant pays
Trash Collection	Not Applicable
Range/Microwave	Not Applicable
Refrigerator	Not Applicable
Other	Not Applicable

Most of the errors are caused by incorrect selections on this section of the tab. This section should match the Utility Allowance Questionnaire and will allow the final tab to populate correctly.

Building Characteristics

- Select the “Building Characteristics” tab
- Unit Type
- Schedule Type and Electric Tariff should not change
- Green Discount; this is only selected if the appropriate back-up documentation can be provided to show that the building meets the requirements
- Utilities and Sources should be selected as is applicable to the development

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Utility Allowance: HUD Utility Schedule Model

Print the form shown below for the selected unit type
Create copies of this worksheet for other unit types

Show/Hide State Average Schedule

Allowances for Tenant-Furnished Utilities and Other Services		U.S. Department of Housing and Urban Development Office of Public and Indian Housing					
Locality	Green Discount	Unit Type				Date (mm/dd/yyyy)	
Houston	None	Larger Apartment Bldgs. (5+ units)				12/7/2020	
Utility or Service	Monthly Dollar Allowances						
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Space Heating							
Natural Gas							
Bottled Gas							
Electric Resistance	\$8.64	\$9.40	\$10.34	\$11.28	\$12.22	\$13.17	
Electric Heat Pump							
Fuel Oil							
Cooking							
Natural Gas	\$18.96	\$19.23	\$20.06	\$20.88	\$21.70	\$22.53	
Bottled Gas							
Electric							
Other							
Other Electric	\$9.93	\$11.68	\$16.25	\$20.82	\$25.39	\$29.96	
Air Conditioning	\$8.51	\$10.01	\$13.88	\$17.75	\$21.61	\$25.48	
Water Heating							
Natural Gas	\$3.27	\$3.84	\$5.55	\$7.26	\$8.97	\$10.68	
Bottled Gas							
Electric							
Fuel Oil							
Water	\$32.78	\$35.76	\$55.63	\$85.43	\$115.24	\$145.04	
Sewer	\$49.48	\$53.82	\$82.71	\$126.05	\$169.38	\$212.72	
Trash Collection							
Range/Microwave							
Refrigerator							
Other - specify							
Total	\$131.57	\$143.74	\$204.41	\$289.46	\$374.51	\$459.57	
Total Allowance (Rounded Up)	\$132.00	\$144.00	\$205.00	\$290.00	\$375.00	\$460.00	

The schedule above has allocated any monthly fees from tariffs into the 1st instance they are selected in the Building Characteristics sheet.
Note: If no utility has been selected monthly allowances can be found in space heating. (For an electric heat source, it is in Electric Resistance.)

HUD-52667 Form

- You can clear the data that does not apply
 - Space heating is Resistance so we do not need the other numbers in that section
- Make sure you do not delete an applicable line
 - If you remove Air Conditioning you will not have a correct UA
- The bottom number in the yellow line is the applicable UA for the unit size

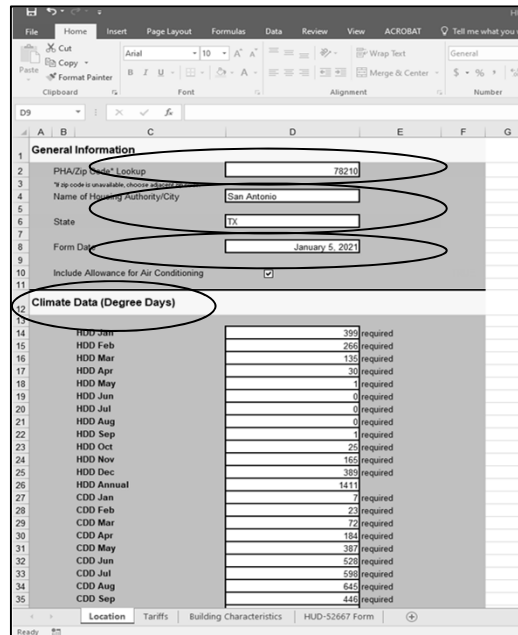
40

Utility Allowance: HUD Utility Schedule Model

“Location” Tab of HUD Model

- Enter the Zip Code of the development, if the Zip Code is not available, enter the PHA Code; which can be found at https://www.hud.gov/sites/dfiles/PIH/documents/PHA_Contact_Report_TX.pdf
- Enter the property name in the next box for “Name of Housing Authority/City”
- State should remain TX
- Enter the date that you are preparing the HUD Model as the “Form Date”

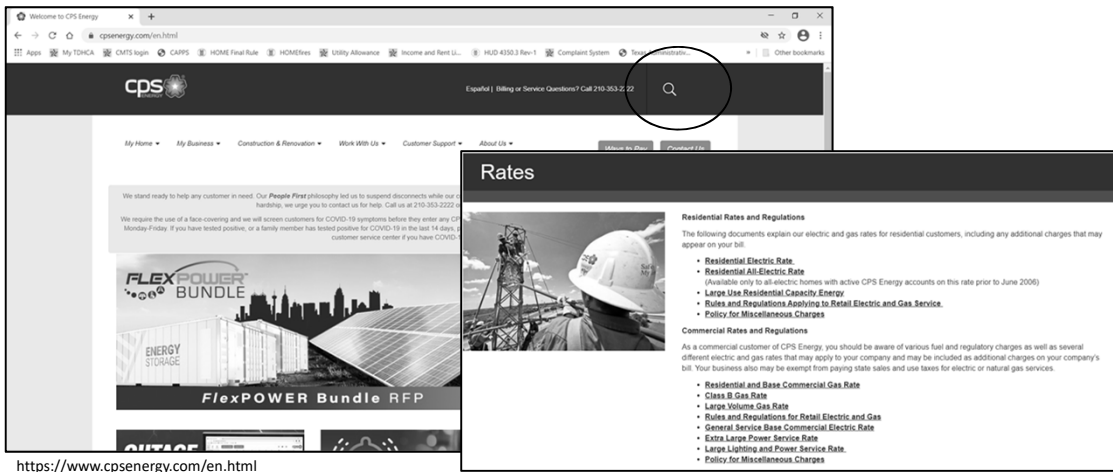
The Climate Data will automatically populate based on the zip code or PHA code that is entered in the first box of this tab. The data in this section should not be changed or edited for any reason.



Utility Allowance: HUD Utility Schedule Model

To Obtain the Rates for the area when regulated:

- Visit the provider’s website (this will vary for each area); for this example we are using San Antonio.
- If you are unable to find the rates on the provider’s website, email or call the provider for the location of the rates. Please do not simply use the rates from a current bill.



Utility Allowance: HUD Utility Schedule Model

Electric January 1, 2024 Page 1 of 2

CPS Energy
RESIDENTIAL SERVICE
ELECTRIC RATE
RE

APPLICATION
This rate is applicable to all originating current service for residential purposes only, to any Customer whose entire residential requirement on the premises are supplied at one point of delivery through one meter.

When a portion of a residence or household load served through one meter is used for non-residential purposes, this rate is not applicable. However, if the wiring is so arranged that the service for residential purposes and that for non-residential purposes are separately metered, this rate is applicable to the service supplied for residential purposes.

This rate is not applicable to service for loads or to service for hotels, rooming houses, boarding houses, schools, dormitories, or to premises used for other than residential purposes.

This rate is not applicable when more than three residential loads are served through one meter.

TYPE OF SERVICE
The types of service available under this rate are described in CPS capacity and voltage plans and ratings are set adjacent to the previous CPS Energy Rules and Regulations Applying to Retail Electric II One Year Service Definition.

MONTHLY BILL

Rate	Description
\$ 8.75	Service Availability Charge
\$ 0.0691	Energy Charge Per KWH for all KWH
\$ 0.0198	Peak Capacity Charge* Per KWH for all KWH in excess of 600 KWH

*Peak Capacity Charge is applicable only during the summer billing period (June - September).

Minimum Bill
\$8.75. A higher Minimum Bill may be specified in the Customer's Application and Agreement for Electric Service. The Minimum Bill is not subject to reduction by credits allowed under the adjustments below.

Adjustments
Plus or minus an amount which reflects the difference in the unit fuel cost factor for the current month above or below a basic cost of \$0.01416 per KWH sold. The unit fuel cost factor for the current month is computed as the sum of:

Rate: 02/01/2024

Residential Service Electric Rate

- If the provider has multiple residential plans, you must use the rate plan that applies to ALL tenants
- If there are additional items included (riders, etc.) you must include all that are applicable

Utility Allowance: HUD Utility Schedule Model

Electric January 1, 2024 Page 1 of 2

CPS Energy
RESIDENTIAL SERVICE
ELECTRIC RATE
RE

APPLICATION
This rate is applicable to all originating current service for residential purposes only, to any Customer whose entire residential requirement on the premises are supplied at one point of delivery through one meter.

When a portion of a residence or household load served through one meter is used for non-residential purposes, this rate is not applicable. However, if the wiring is so arranged that the service for residential purposes and that for non-residential purposes are separately metered, this rate is applicable to the service supplied for residential purposes.

This rate is not applicable to service for loads or to service for hotels, rooming houses, boarding houses, schools, dormitories, or to premises used for other than residential purposes.

This rate is not applicable when more than three residential loads are served through one meter.

TYPE OF SERVICE
The types of service available under this rate are described in CPS capacity and voltage plans and ratings are set adjacent to the previous CPS Energy Rules and Regulations Applying to Retail Electric II One Year Service Definition.

MONTHLY BILL

Rate	Description
\$ 8.75	Service Availability Charge
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*Peak Capacity Charge is applicable only during the summer billing period (June - September).

Minimum Bill
\$8.75. A higher Minimum Bill may be specified in the Customer's Application and Agreement for Electric Service. The Minimum Bill is not subject to reduction by credits allowed under the adjustments below.

Adjustments
Plus or minus an amount which reflects the difference in the unit fuel cost factor for the current month above or below a basic cost of \$0.01416 per KWH sold. The unit fuel cost factor for the current month is computed as the sum of:

Rate: 02/01/2024

Fuel Cost Factor

- This is not always on the rate sheet, you will need to locate it on the provider's website or through email

Retail Electric Fuel/Regulatory Adjustment Factors

Rate Class	January 2021			January 2020
	Retail Electric Fuel Adj. Factor (per kWh)	Regulatory Adj. Factor (per kWh)	Fuel/Regulatory Adj. Factor (per kWh)	Fuel/Regulatory Adj. Factor (per kWh)
RES	\$ 0.01569	\$ 0.01159	\$ 0.02728	\$ 0.01972
PL	0.01569	0.00961	0.02530	0.01785
LLP	0.01569	0.00821	0.02390	0.01662
ELP/LPT	0.01569	0.00667	0.02236	0.01597
SLP	0.01569	0.00637	0.02206	0.01562
TS	0.01569	0.00566	0.02135	0.01464
STLT & ANSL	0.01569	0.00075	0.01644	0.01001

Effective August 2009, the electric fuel adjustment factor includes the STEP surcharge.
Regulatory Adjustment Factors effective February 1, 2020.

Utility Allowance: HUD Utility Schedule Model

“Tariffs” Tab of HUD Model

- Enter the date at the top under “Current”
- Utility Name (name of provider)
- Rate Name
- Rate Effective Date
- *For this example the rate is different for the summer;* so we need to enter the months that the plan states are the “summer months”
- Monthly Charge is the Service Availability Charge
- Size of blocks should correspond with the rate sheet
- Cost of blocks will correspond with the rate sheet
- *For this example there is a winter/summer rate*
- Extra Charges are the Fuel/Regulatory Adjustment Factors
- Taxes include the state electric tax, population tax and city tax (if the city charges, which San Antonio does not)

Standard Electric Utility Tariff

Date Entered: Previous (July 31, 2015) / Current (January 5, 2021)

Utility Name: CPS Energy
 Rate Name: Residential
 Rate Effective Date: February 1, 2014

First Month of Summer: January (1) / June (6)
 Last Month of Summer: December (12) / September (9)

Monthly Charge: \$ 8.75 / \$/month

Summer
 Size of First Block: 600 kWh
 Size of Second Block: remainder kWh
 Size of Third Block: kWh
 Size of Fourth Block: kWh
 Cost of First Block: 0.0691 \$/kWh
 Cost of Second Block: 0.0889 \$/kWh
 Cost of Third Block: \$/kWh
 Cost of Fourth Block: \$/kWh

Winter
 Size of First Block: remainder kWh
 Size of Second Block: kWh
 Size of Third Block: kWh
 Size of Fourth Block: kWh
 Cost of First Block: 0.0691 \$/kWh
 Cost of Second Block: \$/kWh
 Cost of Third Block: \$/kWh
 Cost of Fourth Block: \$/kWh

Extra Charges: 0.02728 \$/kWh
 Taxes: 2.1637 %

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Utility Allowance: HUD Utility Schedule Model

MONTHLY BILL

Rate
 \$ 8.75 Service Availability Charge

Energy Charge
 \$ 0.0691 Per KWH for all KWH

Peak Capacity Charge*
 \$ 0.0198 Per KWH for all KWH in excess of 600 KWH

*Peak Capacity Charge is applicable only during the summer billing period (June - September).

Minimum Bill
 \$8.75. A higher Minimum Bill may be specified in the Customer's Application and Agreement for Electric Service. The Minimum Bill is not subject to reduction by credits allowed under the adjustments below.

Adjustments
 Plus or minus an amount which reflects the difference in the unit fuel cost factor for the current month above or below a basic cost of \$0.01416 per KWH sold. The unit fuel cost factor for the current month is computed as the sum of:

Retail Electric Fuel/Regulatory Adjustment Factors

Rate Class	January 2021			January 2020
	Retail Electric Fuel Adj. Factor (per kWh)	Regulatory Adj. Factor (per kWh)	Fuel/Regulatory Adj. Factor (per kWh)	Fuel/Regulatory Adj. Factor (per kWh)
RES	\$ 0.01569	\$ 0.01159	\$ 0.02728	\$ 0.01972
PL	0.01569	0.00961	0.02530	0.01785
LLP	0.01569	0.00821	0.02390	0.01662
ELP/LPT	0.01569	0.00667	0.02236	0.01597
SLP	0.01569	0.00637	0.02206	0.01562
TS	0.01569	0.00566	0.02135	0.01464
STLT & ANSL	0.01569	0.00075	0.01644	0.01001

Effective August 2009, the electric fuel adjustment factor includes the STEP surcharge.
 Regulatory Adjustment Factors effective February 1, 2020.

Standard Electric Utility Tariff

Date Entered: Previous (July 31, 2015) / Current (January 5, 2021)

Utility Name: CPS Energy
 Rate Name: Residential
 Rate Effective Date: February 1, 2014

First Month of Summer: January (1) / June (6)
 Last Month of Summer: December (12) / September (9)

Monthly Charge: \$ 8.75 / \$/month

Summer
 Size of First Block: 600 kWh
 Size of Second Block: remainder kWh
 Size of Third Block: kWh
 Size of Fourth Block: kWh
 Cost of First Block: 0.0691 \$/kWh
 Cost of Second Block: 0.0889 \$/kWh
 Cost of Third Block: \$/kWh
 Cost of Fourth Block: \$/kWh

Winter
 Size of First Block: remainder kWh
 Size of Second Block: kWh
 Size of Third Block: kWh
 Size of Fourth Block: kWh
 Cost of First Block: 0.0691 \$/kWh
 Cost of Second Block: \$/kWh
 Cost of Third Block: \$/kWh
 Cost of Fourth Block: \$/kWh

Extra Charges: 0.02728 \$/kWh
 Taxes: 2.1637 %

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Utility Allowance: HUD Utility Schedule Model

Trash Tariffs

- This data will be used on the “Tariffs” tab
- Obtain the rates from the trash provider’s website
- Include all charges that would be present on the tenant’s utility bill

PAYT	SMALL	MEDIUM	LARGE
Solid Waste Fee	\$14.76	\$18.76	\$26.76
Environmental Fee - Solid Waste	\$1.74	\$1.74	\$1.74
Environmental Fee - Parks	\$1.50	\$1.50	\$1.50
Total City Services (Taxable)	\$18.00	\$22.00	\$30.00

<https://www.sanantonio.gov/swmd/About-Us/Rates> 47

Utility Allowance: HUD Utility Schedule Model

Trash Collection Fees

- Use the applicable rate for your development, if the tenants can choose their size you can use the most conservative
- Enter the rates in each box, this one will not vary based on unit size

SOLID WASTE SERVICE MONTHLY RATES			
PAYT	SMALL	MEDIUM	LARGE
Solid Waste Fee	\$14.76	\$18.76	\$26.76
Environmental Fee - Solid Waste	\$1.74	\$1.74	\$1.74
Environmental Fee - Parks	\$1.50	\$1.50	\$1.50
Total City Services (Taxable)	\$18.00	\$22.00	\$30.00

Trash Collection Fees	
Studio	18
1 Bedroom	18
2 Bedroom	18
3 Bedroom	18
4 Bedroom	18
5 Bedroom	18

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Utility Allowance: HUD Utility Schedule Model

Building Characteristics

Unit Type: Larger Apartment Bldgs. (5+ units)

Schedule Type: Projected Allowance Schedule

Electric Tariff: Standard Electric Utility Tariff

Green Discount*: None

*Choose LEED or ENERGY STAR if the building meets that certification. Choose Significant Green Retrofit if the building had energy saving rehabilitation to any of the following systems in the last 5 years: (1) heating, (2) cooling, (3) lighting, (4) DHW systems, (5) appliances, (6) building envelope, (7) water measures, and/or (8) on-site generation.

Print the form shown below for the selected unit type

Projected Family Allowances To be used to compute specific family allowances.

Unit size: 0 BR

Utility or Service	Fuel Source
Space Heating	Electric Resistance
Cooking	Electric
Other Electric	Electric
Air Conditioning	Electric
Water Heating	Electric
Water	Not Applicable
Sewer	Not Applicable
Trash Collection	Tenant pays
Range/Microwave	Not Applicable
Refrigerator	Not Applicable
Other	Not Applicable

Most of the errors are caused by incorrect selections on this section of the tab. This section should match the Utility Allowance Questionnaire and will allow the final tab to populate correctly.

Building Characteristics

- Select the “Building Characteristics” tab
- Unit Type
- Schedule Type and Electric Tariff should not change
- Green Discount; this is only selected if the appropriate back-up documentation can be provided to show that the building meets the requirements
- Utilities and Sources should be selected as is applicable to the development

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Utility Allowance: HUD Utility Schedule Model

Print the form shown below for the selected unit type
Create copies of this worksheet for other unit types

Show/Hide State Average Schedule

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

San Antonio, Green Discount: None, Unit Type: Larger Apartment Bldgs. (5+ units), Date Entered: 1/5/2021

Utility or Service	Monthly Dollar Allowances					
	0 BR	1BR	2 BR	3 BR	4 BR	5 BR
Space Heating	Natural Gas					
	Bottled Gas					
	Electric Resistance	\$15.64	\$16.86	\$18.50	\$20.15	\$21.80
	Electric Heat Pump					
Cooking	Natural Gas					
	Bottled Gas					
	Electric	\$4.02	\$4.73	\$6.85	\$8.97	\$11.08
Other Electric	\$15.19	\$17.87	\$24.87	\$31.86	\$38.86	\$45.85
Air Conditioning	\$12.49	\$15.05	\$22.34	\$29.65	\$36.96	\$44.27
Water Heating	Natural Gas					
	Bottled Gas					
	Electric	\$9.02	\$10.61	\$13.54	\$16.48	\$20.11
Water						
Sewer						
Trash Collection	\$18.00	\$18.00	\$18.00	\$18.00	\$18.00	\$18.00
Range/Microwave						
Refrigerator						
Other - specify						
Total	\$74.37	\$83.12	\$104.11	\$125.11	\$146.11	\$167.11
Total Allowance (Rounded Up)	\$75.00	\$84.00	\$105.00	\$126.00	\$147.00	\$168.00

The schedule above has allocated any monthly fees from tariffs into the 1st instance they are selected in the Building Characteristics sheet.
Note: If no utility has been selected monthly allowances can be found in space heating. (For an electric heat source, it is in Electric Resistance.)
Be sure to apply monthly fees correctly to allowances with a different utility profile!

HUD-52667 Form

- You can clear the data that does not apply
 - Space heating is Resistance so we do not need the other numbers in that section
- Make sure you do not delete an applicable line
 - If you remove Air Conditioning you will not have a correct UA
- The bottom number in the yellow line is the applicable UA for the unit size

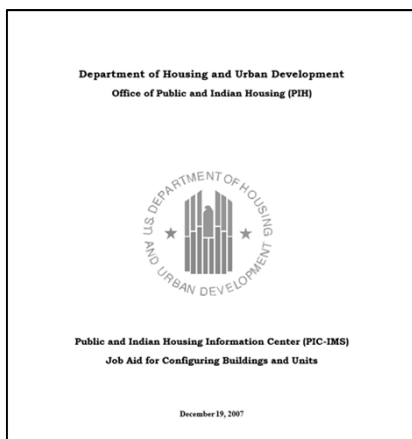
50

Utility Allowance: Building Types

Identifying Buildings Types

HUD Document referenced in §10.614(b)(1): https://www.hud.gov/sites/documents/DOC_11608.PDF

Additional Resource from HUD: <https://www.huduser.gov/portal/sites/default/files/pdf/HUSM-Instructions.pdf>



CURRENT MODEL UNIT TYPES		
Unit Types	Based on RECS Unit Type	RECS Type Number
Single Family House	SF Det	2
Single Family Attached	SF Att	3
Lowrise Apartment (2 - 4 units)	Apt 2-4	4
Larger Apartment Bldgs. (5+ units)	Apt 5+	5
Manufactured Homes	Mobile	1

The listing of previous HUSM unit types is shown on the table below to provide a way to update utility schedules based on RECS unit type and number. For example, a townhouse under the previous HUSM is currently identified as a Single Family Attached unit with a RECS type number of 3.

PREVIOUS MODEL UNIT TYPES		
Unit Types	Based on RECS Unit Type	RECS Type Number
Detached houses	SF Det	2
Duplexes, row or townhouses	SF Att	3
Garden and high rise apartments	Apt 5+	5
Manufactured homes	Mobile	1
Duplex	SF Att	3
Triplex	SF Att	3
Fourplex	SF Att	3
Townhouse - within row	SF Att	3
Townhouse - end of row	SF Att	3
Multifamily	Apt 2-4	4
Highrise	Apt 5+	5
Apartment	Apt 2-4	4
Alternative 1	Apt 2-4	4
Alternative 2	Apt 2-4	4
Alternative 3	Apt 2-4	4
Alternative 4	Apt 2-4	4

Bedrooms – Users select the appropriate number of bedrooms from the drop-down menu. The model allows for studio and 1 to 5 bedroom unit selections.

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Utility Allowance: Building Types

CURRENT MODEL UNIT TYPES		
Unit Types	Based on RECS Unit Type	RECS Type Number
Single Family House	SF Det	2
Single Family Attached	SF Att	3
Lowrise Apartment (2 - 4 units)	Apt 2-4	4
Larger Apartment Bldgs. (5+ units)	Apt 5+	5
Manufactured Homes	Mobile	1

The listing of previous HUSM unit types is shown on the table below to provide a way to update utility schedules based on RECS unit type and number. For example, a townhouse under the previous HUSM is currently identified as a Single Family Attached unit with a RECS type number of 3.

Currently, the Department utilizes the HUD Guidance as shown on this slide to determine the appropriate building type for developments. This is used when calculating the HUD Model for a development.

PREVIOUS MODEL UNIT TYPES		
Unit Types	Based on RECS Unit Type	RECS Type Number
Detached houses	SF Det	2
Duplexes, row or townhouses	SF Att	3
Garden and high rise apartments	Apt 5+	5
Manufactured homes	Mobile	1
Duplex	SF Att	3
Triplex	SF Att	3
Fourplex	SF Att	3
Townhouse - within row	SF Att	3
Townhouse - end of row	SF Att	3
Multifamily	Apt 2-4	4
Highrise	Apt 5+	5
Apartment	Apt 2-4	4
Alternative 1	Apt 2-4	4
Alternative 2	Apt 2-4	4
Alternative 3	Apt 2-4	4
Alternative 4	Apt 2-4	4

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Utility Allowance: Building Types

****If the multi-story building (units on top of other units) has less than five (5) units, the Department will calculate based on Low-rise (2-4 units). If the multi-story building (units on top of other units) has five (5) or more units, the Department will calculate based on Apartments (5+ units).****

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Utility Allowance: MFDL Buildings

Developments with Multi-Family Direct Loan (MFDL) funds issued by the Department

- May use any methodology except PHA
 - Buildings for which the only source of MFDL funding is HOME-ARP and which contain no HOME-Match Units may use the PHA. It must be submitted initially and annually for approval by the Department.
- May not combine methodologies
- Must use the Department issued/approved UA for all units, even voucher holders
- HTC buildings in which there are units under MFDL programs are considered HUD-Regulated buildings and the MFDL Utility Allowance will be the allowance for all units in the building, regardless of the resident being on the MFDL program

Developments with Multi-Family Direct Loan (MFDL) funds NOT issued by the Department

- Must use the issued/approved UA for all units, even voucher holders
- HTC buildings in which there are units under MFDL programs are considered HUD-Regulated buildings and the MFDL Utility Allowance will be the allowance for all units in the building, regardless of the resident being on the MFDL program

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Utility Allowance: MFDL Buildings

The Department will issue a Utility Allowance if annual review is not received by October 1st

- For property specific data, the Department will use:
 - The Annual Owner's Compliance Report;
 - Entrance Interview Questionnaire from prior monitoring review;
 - The owner may be contacted for any missing or unclear information
- Utilities will be evaluated in the following manner:
 - For regulated utilities, the Department will contact the provider directly and apply the charges in effect no later than 60 days before the allowance will be effective.
 - For deregulated utilities:
 - The Department will use the Power to Choose website and search available providers by zip code
 - The plan chosen will be the median cost per kWh based on the average price per kWh for the average monthly use of 1000 kWh
- The Department will notify the owner contact in CMTS of the new allowance
 - The owner will be provided a five day period to report errors related to the physical characteristics of the buildings and utilities paid by the residents
- The allowance must be implemented for rent due in all program units thirty (30) days after the Department notifies the Owner of the allowance.

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Utility Allowance: After the Compliance Period

- After the Compliance Period, utilities paid to the Owner are accounted for in the utility allowance
 - TCAP, Exchange, Bond, and THTF Developments layered with Housing Tax Credits no longer within the Compliance Period also include utilities paid to the Owner as part of the utility allowance
- The tenant paid portion of the rent plus the applicable utility allowance must not exceed the applicable rent limit
- It is the owner's responsibility to ensure that all rents are properly restricted

What does this mean? If the development bills water/sewer, for example, based on a RUBS system; during the Compliance Period this is a non-optional fee and must be taken into account on the monthly rent; however, once the Compliance Period is over this now becomes part of the Utility Allowance and is no longer considered a non-optional fee. Failure to do this will result in noncompliance!

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Utility Allowance: Changes in the UA

An Owner may not change methodologies or the utilities that a resident is financially responsible for without prior written Department approval.

- The Department will review all requests, with the exception of the “Actual Use” methodology, within 90 days of the receipt of the request
- If the owner fails to post the notice to the residents AND simultaneously submit the request to the Department by the beginning of the 90-day period, the approval or denial will be delayed for up to 90 days after the Department notification

*** Once approval to start or stop charging for a utility is received, owners must implement the change in utilities charged at the time of each household’s lease renewal, and no sooner. ***

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Utility Allowance: Requirements for Annual Review

- RHS and HUD-Issued Utility Allowances
 - The owner must demonstrate that the utility allowance has been reviewed annually and in accordance with RHS and HUD regulations
- PHA Method
 - Owners are responsible for periodically determining if the applicable PHA released an updated schedule to ensure timely implementation. When a new allowance is made available by the PHA, it can be implemented immediately, but must be implemented for rent due 90 days after the effective date
 - HOME-ARP developments must submit for annual review, if approved to use this methodology
- Written Local Estimate (WLE), HUD Utility Model Schedule (HUSM) and Energy Consumption Model (ECM)
 - Owners must update the allowance once a calendar year. The update and all back-up documentation MUST be submitted to the Department no later than October 1st of each year
- Actual Use Method
 - Owners must update once a calendar year. The update and all back-up documentation MUST be submitted no later than August 1st of each year
- **A utility allowance is considered implemented once the Unit Status Report is updated and rents are restricted.**

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Utility Allowance: Failure to Submit for Annual Review

With the exception of MFDL developments, if an Owner fails to submit for annual review during the calendar year, the Development's Utility Allowance will default to the applicable PHA allowance.

If the Development is located in an area that does not have a PHA, the Development fails to have a properly calculated Utility Allowance.

The Utility Allowance for MFDL Developments that fail to submit for annual review will be calculated using the HUD Utility Schedule Model, pursuant to subsection (d) of this section.

It is an issue of noncompliance if the Development fails to submit for annual review of the Utility Allowance. The purpose of this requirement is to allow the Department to test for gross rent issues at the time of a monitoring review.

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Utility Allowance: Combining Methods

• In general, owners may combine any methodology described in §10.614 for each utility service type paid directly by the resident and not by or through the owner of the building

• Example: If residents are responsible for electricity and gas, an owner may use the appropriate PHA allowance to determine the gas portion of the allowance and use the HUD Model to determine the electric portion of the allowance

• RHS and HUD-Regulated buildings (including those HUD-Regulated by MFDL funds) are not allowed to combine methodologies

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Utility Allowance: Combining Methods

Utility Allowance to use when there are multiple HUD programs in a building:

- If the building is covered by Multifamily Notice H-2015-4 (PBS8) or receives assistance from RHS, the applicable UA for every rent restricted unit is the UA issued by that program.
- If the building has Department MFDL funds, the applicable UA for every rent restricted unit is the UA approved by the Department (per 10 TAC). This is true even if the building also has Project Based Vouchers/Public Housing.
- If the building has multiple HUD programs that are not covered by 2015-4 (Public Housing/Project Based Vouchers) AND the building does not have Department MFDL funds, it is up to the owner to say which UA they are using.
- Tenants with Housing Choice Vouchers in a HUD-regulated building will not use the PHA UA. They will always use the UA approved by the HUD program.

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Utility Allowance: Applications

- If the application includes RHS assisted buildings or tenants, the UA is prescribed by the RHS program, no other method is allowed
- If the application includes HUD-Regulated buildings for HUD programs, other than an MFDL program, the applicable UA for all rent restricted units in the building(s) is the HUD Utility Allowance, no other method is allowed
- If the application includes MFDL funds from the Department, applicants may calculate the UA in accordance with 10 TAC §10.614(c)(3)(B), (C), (D) or (E)
- HOME-ARP may request to use the method described in §10.614(c)(3)(A), the Department must approve this request
- If the application includes federal funds from a unit of local government but no MFDL from the Department, applicants are required to request in writing the UA from the awarding jurisdiction
- For all other applications, applicants may calculate the UA in accordance with §10.614(c)(3)(A), (B), (C), (D) or (E)
 - Upon request, the Compliance Division (UA Team) will calculate or review an allowance within 21 days, but no earlier than 90 days from when the application is due

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Utility Allowance: Application Submission

All Utility Allowance requests related to applications of funding must:

- Be submitted directly to UA-Application@tdhca.state.tx.us
- Requests not submitted to this email address will not be recognized
- Include the “Utility Allowance Questionnaire for Applications” along with all required back-up based on the methodology

If owners want to change to a UA other than what was used for underwriting the owner MUST submit documentation for Department approval, at minimum, 90 days prior to the commencement of leasing activities.

The Owner is not required to review the utility allowances, or implement new allowances, until the building has achieved 90% occupancy for a period of 90 consecutive days, or the end of the first year of the Credit Period (if applicable), whichever is earlier. ***Once a request to change the utility allowance is approved or implemented, the utility allowance used at underwriting is no longer valid.***

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Utility Allowance: Applications with Existing Funds

Any requests for new resources (either additional funds or tax credits) on a Development with an existing Department LURA must use the method that is in effect on the existing Development. If the Owner wishes to change or if for an MFDL application is required to change the methods for the purposes of the application, a request for the existing Development must first be submitted to the Compliance Division for approval.

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Utility Allowance: Submission

All requests described in this presentation, other than those for applications, must be complete and uploaded directly to the Development's CMTS account using the "Utility Allowance Documents" in the type field and "Utility Allowance" as the TDHCA Contact. The Department will not be able to approve requests that are incomplete and/or are not submitted correctly.

Utility Allowance Submissions for the 811 Program must be uploaded to the attention of Bill Cranor. This means, you will have to upload one packet to the attention of Utility Allowance and another to Bill Cranor.

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Utility Allowance: Section 811 PRA Program

For Owners participating in the Department's Section 811 Project Rental Assistance (PRA) Program the owner may choose the methodology they wish to use. The rules for the chosen method must be followed. On an annual basis, the Development will submit a Utility Allowance update to the 811 Division. The 811 Division will issue an approved Rent Schedule once the submission is reviewed. The allowance listed on the rent schedule only applies to 811 PRA units, not the entire building, and is the only allowance approved for use on 811 PRA units.

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Utility Allowance: Keys to Success

- ALWAYS upload Utility Allowance submission to the attention of “Utility Allowance” on the TDHCA Contact List
- Review the UA submission prior to upload
 - Is the questionnaire accurate and complete?
 - Does the posting have the right dates and amounts and unit sizes?
- Upload all required items for the methodology chosen
- Make sure you are using the most current forms available on the Department website:
<https://www.tdhca.state.tx.us/pmcomp/utility-allowance.htm>
- Email a member of the UA Team **prior** to submission if you have a question
- Remember, Utility Allowance Rules are **Building** Rules

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Utility Allowance



The Utility Allowance Team

Cara Pollei, cara.pollei@tdhca.state.tx.us
 Carolyn Metzger, carolyn.metzger@tdhca.state.tx.us
 Nicole Martinez, nicole.martinez@tdhca.state.tx.us

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THANK YOU

<https://www.tdhca.state.tx.us/pmcomp/utility-allowance.htm>

DON'T FORGET:

UTILITY ALLOWANCE ANNUAL REVIEW IS REQUIRED BY
OCTOBER 1, 2023!

ACTUAL USE IS DUE BY AUGUST 1, 2023!



TDHCA Utility Allowance Questionnaire for Application

Property Name:

HTC File#:

City:

County:

Zip Code:

1. Are you applying for Multifamily Direct Loans (MFDL) with THDCA; select type or none? select one
2. Are you applying for Multifamily Direct Loans (MFDL) from another jurisdiction? select one
3. Will there be HUD-Regulated buildings (other than those that are HUD Regulated because of a MFDL) select one
4. Will there be any RHS assisted buildings or tenants? select one
5. What utility allowance method are you requesting to use? select one
6. What Utilities do residents pay?

	Owner Pays	Resident Pays	Not Applicable	Paid directly to provider or to/thru the owner?	If YES, select billing method
Gas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	select one	select one
Electric	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	select one	select one
Water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	select one	select one
Sewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	select one	select one
Trash Collection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	select one	select one
The units are heated by:		<input type="checkbox"/> gas	<input type="checkbox"/> electric	select type	
The stoves in the unit are:		<input type="checkbox"/> gas	<input type="checkbox"/> electric		
The units are cooled by:		<input type="checkbox"/> evaporative	<input type="checkbox"/> electric		
If individual hot water heaters, they are:		<input type="checkbox"/> gas	<input type="checkbox"/> electric		

7. What is the Building Configuration(s)?
 - a. Apartment/Garden Style (5+ units) Yes No
 - b. Duplex/Fourplex/Townhouse Yes No
 - c. Detached Home Yes No
 - d. Apartments (2-4 units) Yes No

8. What are the Unit Types?
 - a. 0 Bedroom Yes No
 - b. 1 Bedroom Yes No
 - c. 2 Bedroom Yes No
 - d. 3 Bedroom Yes No
 - e. 4 Bedroom Yes No

Upon completion, submit this form, along with all back up for the utility allowance method requested to UA-Application@tdhca.state.tx.us. Requests not submitted to this email address will not be reviewed. If the utility is paid to or through the owner, at the time of the first review the owner must provide evidence of the most recent billing cycle documentation (i.e. utility bills, tenant billing, etc.) along with evidence of the rate plan used for the calculations as required by §10.614.

Utility Allowance Questionnaire

This form must be completed by all owners requesting to switch utility allowance methodologies and when submitting an allowance for annual review. Please contact Cara Pollei with any questions at (512) 475-3821 or cara.pollei@tdhca.state.tx.us. All submissions must be uploaded to the Development's Compliance Monitoring Tracking System (CMTS) account.

When uploading, please be sure to choose "Utility Allowance Documents" in the "Type" dropdown menu. In the description box, please identify the method (e.g., written local estimate, HUD model) and if it is an initial request or annual review. In the "TDHCA Contact" dropdown menu, please select "Utility Allowance."

1. Name of Development: _____ and CMTS ID _____
2. Development address:
 City: _____ Zip Code: _____ County: _____
3. Types of TDHCA Program Funding :

Type of Funding	File Number

4. Type of request:
 - a. List CURRENT utility allowance method and source for utilities that residents pay.

Utility	Source (e.g. name of utility provider or housing authority)	Effective Date	Methodology

- b. List NEW or UPDATED utility allowance method and source for utilities that residents pay.

Utility	Source (name of utility provider or housing authority)	Anticipated Effective Date	Methodology

5. If this request is for the annual review of the current methodology, were the annual review requirements met last year?
 - a. If no, please select reason:
6. What is the beginning date of the 90 day review period? List date.
7. Has the proposed utility allowance been posted in a common area of the Leasing Office for resident review (10TAC§10.614(h))?
 - a. As of what date:
8. What is the intended effective date? List date rents next due after end of 90 day notification period
9. Does the Development receive assistance from USDA- Rural Development (formerly Farmer’s Home Administration (FmHa))?
 - a. If yes, do any of the residents in the Development receive Rental Assistance from the USDA?
10. Is the building a HUD-regulated building?
11. Does the Development have HOME funds from TDHCA or any other Participating Jurisdiction (PJ)?
 - a. If yes, what PJ awarded the HOME funds?
 - b. Does each building have at least one (1) HOME unit?
12. What is the Building Configuration? (if there are multiple building types, indicate below)
 - a. Building Type 1:
 - b. Building Type 2:
13. Utility information:

	Owner Pays	Resident Pays	Not Applicable	Paid directly to utility provider or to/thru the owner?	If paid to OWNER, select billing method and include the most recent billing cycle evidence
Gas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	select one	select one
Electric	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	select one	select one
Water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	select one	select one
Sewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	select one	select one
Trash Collection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	select one	select one
The units are heated by:	<input type="checkbox"/> gas		<input type="checkbox"/> electric	select type	
The stoves in the unit are:	<input type="checkbox"/> gas		<input type="checkbox"/> electric		
If individual hot water heaters, they are:	<input type="checkbox"/> gas		<input type="checkbox"/> electric		

14. Confirm documentation submitted with this request.

- a. Current UA sources (ex: last year’s approval letter from TDHCA or PHA schedule)
- b. New/Updated UA sources (ex: letter from utility provider, HUD model & back up, PHA schedule, etc.)
- c. Posted Notice to Residents (not needed if annual PHA request with no changes; this is required for ALL requests to change methodology or utilities billed)
- d. **If paid to or through the owner a copy of a current resident bill and the applicable rate plan for the utility.**

Completed By

Date

Title

Company Name

Phone Number

Email Address