Following are instructions for completing the 2009 HAP Needs Spreadsheet:

Row 7 – Renewal Funding for 2009: Enter CY Eligibility based on renewal funding letter or other HUD notification.

Row 8 – Available NRA: Enter NRA Balance as of 1/1/2009

Row 9 – Set-aside funding if awarded

Rows 14-25 – Monthly leasing and HAP data

Turnover data (Column B):

- For months where the actual number of leased units is available, turnover data is not needed.
- For future months, estimate turnover using the PIC EOP report for the most recent 12 month period

Leasing data (Column C):

- Enter actual units leased that have been reported in VMS.
- For future months, the cell contains a formula which subtracts the unit turnover per month from the unit months leased in the previous month. In the template, the formula is used for April forward.

Average HAP data (Column D):

- For months where units leased and total monthly HAP is known, the average HAP is automatically calculated using a formula. The formula divides the total HAP in column E, by the total units leased in column C. In the template, the formula is used for January – March.
- For future months, the average HAP should be carried forward, unless the PHA can support that average HAP costs are expected to increase (e.g. upcoming annual reexams using higher payment standards).

Monthly HAP data (Column E):

- Enter actual monthly HAP when known.
- For future months, the cell contains a formula which multiplies the units leased in column C by the average HAP in column D. In the template, this formula is used for April forward.

Row 26 – Total Unit Months: Automatically calculated using a formula
Row 27 – Authorized or Baseline Units
Row 28 – Authorized Unit Months: Automatically calculated using a formula
Row 30 – Total HAP Needs: Automatically calculated using a formula

Row 32 – Projected Shortfall: Automatically calculated using a formula.

If the number is negative (in parentheses) then the PHA should have a surplus at the end of the year. Unless the amount in the projected surplus would not support the higher HAP costs due to a move, the PHA cannot deny the move. For example, the HAP costs (based on payment standards) in the new location are likely to be $300/month higher. If there are 6 months remaining in the year, as long as the PHA has an $1800 surplus, the move cannot be denied.

If the number is positive, then the PHA has a projected shortfall and has the authority to deny a move. In addition, the PHA will also have to either take additional measures to reduce their program costs (e.g. obtain payment standard waiver, terminate families), or pay for the cost overrun with funds from the administrative fee reserve.

Other things to keep in mind:

- This spreadsheet is only a tool to assist you with your analysis.
- PHAs cannot deny a move due to lack of funding by including projected costs for vouchers that have been issued. In other words, vouchers that have been issued cannot be considered as an expense until HAP contracts are executed and the PHA is making HAP payments. If the PHA currently has 50 vouchers outstanding that would eat the remaining available funding if they were to lease-up, the PHA cannot deny a move that is requested today based on insufficient funding.
- As stated in Notice PIH 2008-43, the definition of "higher cost area" (for purposes of denying moves) is an area where a higher subsidy amount will be paid for a family because of higher payment standard amounts or "more generous" subsidy standards (e.g., the receiving PHA issues a 3-bedroom voucher to a family that received a 2-bedroom voucher from the initial PHA). Therefore, prior to denying a move, the PHA should call the receiving PHA to determine the PHA's subsidy standards.
    - If the family qualifies for a 3-bedroom voucher in the initial PHA's jurisdiction, but only a 2-bedroom voucher in the receiving PHA's jurisdiction, the PHA must compare their 3-bedroom payment standard to the receiving PHA's 2-bedroom payment standard in order to determine if the move is to a "higher cost area."
    - On the other hand, if the family qualifies for a 2-bedroom voucher in the initial PHA's jurisdiction, and a 3-bedroom voucher in the receiving PHA's jurisdiction, the PHA must compare their 2-bedroom payment standard to the receiving PHA's 3-bedroom payment standard to determine the potential increase in costs.