

Documentation Checklist for Section 8 Recertification (HPD)

HPD administers multiple rental assistance programs. The majority of HPD participants are assisted through the Housing Choice Voucher (HCV) program, commonly referred to as the Section 8 program. To remain eligible for assistance under HPD rental assistance programs, you must complete your annual recertification, including submitting required documents, and allow your unit to be inspected when required. Though there may be small differences, this checklist generally applies to all rental assistance programs administered at HPD.

This information is for participants in HPD's Section 8 program. NYCHA, HPD and the NY State Homes and Community Renewal (HCR) all run Section 8 programs. If you are not sure who administers your voucher, reference the letterhead from any correspondence related to your subsidy to identify the appropriate agency. If you are not sure whether you receive Section 8 through NYCHA or HPD, contact HPD at 917-286-4300 or NYCHA's [Customer Contact Center \(CCC\)](#) at 718-707-7771

Annual Recertification for HPD Section 8 Participants

You must submit income, asset, expense and family composition information on an annual basis to help HPD update your tenant share of rent.

When you receive an annual recertification package, you must return it by the deadline provided on the package. To return the completed package, you may email to DTRAI@hpd.nyc.gov, fax to **212-863-5299**, or mail to **100 Gold Street, Room 1-O, New York NY 10038**. You may also use the **DTR Portal** at nyc.gov/dtrownerportal to upload the package.

The package is made up of four sections:

- 1) Cover page: where you must certify that you have completed information truthfully
- 2) Declaration Section: where you review and update the information that you last reported to HPD
- 3) Authorization for the Release of Information, Declaration of Employment Status, and Declaration of All Income forms: must be signed and dated by all household members 18+
- 4) Additional forms (4 – 13): must be filled out if they are applicable to your household
- 5) Supporting documentation: verification documents for all information reported for your household (e.g., proof of income, assets, student status, and expenses for all household members).

HPD will review and verify all information submitted and once the recertification process is completed, HPD will provide both you and the property owner with a *Rent Breakdown Letter* that indicates the approved contract rent, the amount of your share, the HPD share of the rent and lists the names of approved household members.

Note: It is best that all documents are submitted together to make sure the annual recertification is on time. If you are not able to get all supporting documents by the deadline on the recertification package, submit what you have and continue to collect the documentation you need. Delays in submitting supporting income documentation will delay the processing of your annual recertification and could lead to termination of subsidy.

Adding or Removing Household Members

Families must obtain HPD approval to add any family member to the household before the new member occupies the unit, except for additions due to marriage, domestic partnership, birth, adoption, or court-awarded custody. In these cases, the family should request the addition at the time of annual recertification or within 30 days of the change, whichever is sooner.

You must complete the **Request to Add a Household Member form AND** submit supporting documents requested along with proof of income and assets for the additional person. For each added member of your Section 8 household, you must provide the following documentation:

- ✓ **Birth Certificate**
- ✓ **Social Security Card**
- ✓ **Proof of Citizenship or Alien Registration Card**
- ✓ **Authorization to Release Information form (if 18+)**
- ✓ **Declaration of Employment Status (if 18+)**
- ✓ **HUD Debts Owed Form (if 18+)**
- ✓ **Photo ID (if 18+)**
- ✓ **Absent Parent form if addition is for a child who has a parent absent from the household**
- ✓ **Proof of prior address (if 18+)**

If any household member has any income, assets, or expenses, you must provide CURRENT documentation as proof.

If the participant is **requesting to remove an individual** from the Section 8 household, complete the **REQUEST TO REMOVE A HOUSEHOLD MEMBER** form and provide documentation of the new address for the person who is removed from the household.

You may submit completed forms by [email](#), by fax to 212-863-5299 or through the [Document Upload Portal](#). If you're not clear where to send documents, please send them to DTRAI@hpd.nyc.gov.

Interim Recertification for HPD Section 8 Participants

At any time, you may request an interim certification to adjust your tenant share of rent if there is a change in family composition, income, assets, or expenses. For HPD to process a decrease in income, you must provide supporting documentation for the change.

Reason for Interim Request	Supporting Income Documents
If the participant is reporting a decrease in income	Termination letter from an employer; unemployment benefits; two consecutive paystubs showing a reduction in pay; public assistance benefit statement or SSI/SSD/NY SSP award letter showing a reduction in benefits.

It is important that any loss of income is reported immediately to HPD. You do not have to wait until you have collected all documents to report lost income. HPD will send you a form to complete and return. During the COVID19 pandemic, you can immediately submit [the Reporting Decrease in Income form](#) to DTRIncomeDecrease@hpd.nyc.gov with as much detail as you have. You may submit completed forms by [email](#), by fax to 212-863-5299 or through the [Document Upload Portal](#).

You do not have to report any increase in income until your next annual recertification. If you are a participant in the Family Self-Sufficiency program and choose to report an increase in income before your annual recertification, you can email documents to DTRAI@hpd.nyc.gov.

Supporting Documentation (for Both Interim and Annual Recertification)

The below lists provide examples of acceptable forms of supporting documentation when completing an annual certification. In some instances, you may have to complete an HPD form and provide supporting documents. Examples include the *Asset Verification form*, the *Full-Time Student form*, *Real Property Declaration form*, *Medical Expense form* and the *Child Care Expense form*.

ACCEPTABLE DOCUMENTS FOR PROOF OF INCOME

<p><u>Employment</u></p> <ul style="list-style-type: none"> ✓ Pay stubs (consecutive paystubs at least 2 pay stubs for monthly pay, 4 paystubs for bi-weekly pay and 6 paystubs for weekly pay) ✓ Tax returns <p>Verification of Wages form, employer letter, or other verification of employment from your employer</p>	<p><u>Public Assistance</u></p> <ul style="list-style-type: none"> ✓ Budget Letter
<p><u>Self-Employment</u></p> <ul style="list-style-type: none"> ✓ 1099 Statement(s) (1099-DIV, 1099-G, 1099-MISC, 1099-R) ✓ Federal Tax Returns with Schedule C ✓ IRS tax transcripts with wage & income transcripts 	<p><u>Workers Compensation</u></p> <ul style="list-style-type: none"> ✓ Workers Compensation Statement <p><u>Military Pay/Veterans Benefits</u></p> <ul style="list-style-type: none"> ✓ Pension Award Letter ✓ Military Pay Statement ✓ Veteran’s Pay Statement
<p><u>Social Security</u></p> <ul style="list-style-type: none"> ✓ SSI Award Letter ✓ Social Security Benefits 	<p><u>Contributions from Organizations or Others Outside the Household</u></p> <ul style="list-style-type: none"> ✓ Copies of checks or evidence of payment ✓ Letter from person providing the contribution <p><u>Pension/Annuity</u></p> <ul style="list-style-type: none"> ✓ Pension Award Letter ✓ Annuity Documents
<p><u>Adoption/Foster Care</u></p> <ul style="list-style-type: none"> ✓ Foster Care Letters ✓ Guardianship Papers ✓ Letters of Administration 	<p><u>Child Support/Alimony</u></p> <ul style="list-style-type: none"> ✓ Alimony Documents ✓ Statement from Child Support Provider ✓ Court Order ✓ Court Stipulations

ACCEPTABLE DOCUMENTS FOR PROOF OF ASSETS

<p><u>Checking Account/Savings Account</u></p> <ul style="list-style-type: none"> ✓ Bank Statement(s) ✓ 1099 Interest Statement(s) along with value and documentation of assets 	<p><u>Stocks/Bonds</u></p> <ul style="list-style-type: none"> ✓ Stockbroker Statement(s): Stocks, Bonds, and Mutual Funds ✓ Stock Certificate(s) (copy) ✓ 1099 Interest Statement(s)
<p><u>Money Market Funds/Mutual Funds</u></p> <ul style="list-style-type: none"> ✓ Bank Statement(s) (all pages) ✓ Stock Broker Summer/Statement(s): Stocks, Bonds, and Mutual Funds ✓ Stock Certificate(s) (copy) ✓ 1099 Interest Statement(s) 	<p><u>Real Estate</u></p> <ul style="list-style-type: none"> ✓ Real Property Declaration form ✓ Letter from Closing Attorney and Unrecorded Deed ✓ Letter or Agreement from the Condominium/Co-Op ✓ Proprietary Lease ✓ Co-op Shareholder Certificate ✓ Recorded Deed ✓ Federal Tax Return (Including Schedule E)
<p><u>Life Insurance Policy</u></p> <ul style="list-style-type: none"> ✓ Life Insurance Policy Statement(s) 	<p><u>Trust Funds</u></p> <ul style="list-style-type: none"> ✓ Proof of Trust Funds which includes: <ul style="list-style-type: none"> ○ Trust Agreement(s) ○ Bank Statement(s) (All Pages)
<p><u>Retirement (401k/IRA/ROTH)</u></p> <ul style="list-style-type: none"> ✓ All pages of A401K / IRA / ROTH Statement(s) ✓ Bank Statement(s) (All Pages) 	

ACCEPTABLE DOCUMENTS FOR PROOF OF EXPENSES/DEDUCTIONS

<p><u>Full-Time Student Status (18 yrs. or older)</u></p>	<ul style="list-style-type: none"> ✓ Verification of Student Status form ✓ Current school records documenting a student’s full-time status (enrolled and attending) at a degree or certificate granting institution
<p><u>Medical Expenses</u> (for families in which the head, spouse, or co-head is at least 62 or is a person with disabilities)</p>	<p>Medical expenses can be declared by completing the Declaration of Unreimbursed Medical Expenses form and by providing the following documentation:</p> <ul style="list-style-type: none"> ○ Copies of cancelled checks or receipts for medical expenses ○ Insurance premium statements or insurance premium payments listed on other written third-party verification documents such as paystubs ○ Pharmacy printout of unreimbursed prescription payments made in the past 12 months ○ Income tax forms with itemized medical expenses ○ Pension statements that include medical insurance premiums ○ Original receipts or statements from the medical provider showing paid unreimbursed medical expenses ○ Physician’s prescriptions for over-the-counter products and accompanying receipts
<p><u>Childcare expenses</u> (for families where there is an adult who is employed, in training or searching for employment)</p>	<p>Childcare expenses can be declared by completing the Childcare Expense form. Documentation can be provided with the following documentation:</p> <ul style="list-style-type: none"> ✓ Copies of receipts or cancelled checks indicating childcare payments ✓ If the childcare provider is an individual, the provider must provide a statement of the amount they are charging the family for services.
<p><u>Disability Expenses</u> (for families where a disability expense enables an adult to be employed, in training or searching for employment)</p>	<p>Disability expenses can be declared by completing the Declaration of Un-reimbursed Disability Expenses form and providing the following documentation:</p> <ul style="list-style-type: none"> ○ Written certification from a reliable professional that the disabled person requires the services and/or equipment permitting a family member to work ○ <i>For attendant care:</i> Attendant’s written certification of amount received from the family, frequency of receipt and hours of care provided and copies of cancelled checks. If checks are not available, certification of family and attendant of amounts paid is required. ○ <i>For auxiliary apparatus (ex. hearing aid, wheelchair, etc.):</i> Receipts for purchase or proof of monthly payments and maintenance expenses for auxiliary apparatus. In the case where the person with disabilities is employed, a statement from the employer that the apparatus is necessary for employment.