

# H.E.A.R.T. 2.0 Checklist

## *Helping with Emergency Assistance Relief for Tenants 2.0*

Applicant Name \_\_\_\_\_ Date \_\_\_\_\_

**NOTE:** ALL ITEMS REQUIRED FOR APPLICANT ELIGIBILITY

**ELIGIBILITY REQUIREMENTS**

- Proof of Pasco County residency (see "Required Documentation" section below)
- Applicant household income below 80% AMI

Income Level	80% AMI
Household Size	
1	\$46,000
2	\$52,600
3	\$59,150
4	\$65,700
5	\$71,000
6	\$76,250
7	\$81,500
8	\$86,750

- Applicant qualifies for unemployment, or has experienced a reduction in household income, or incurred significant costs due to COVID-19
- Demonstrates a risk of experiencing homelessness or housing instability
- Eligible expenses incurred after March 13th, 2020

**PRIORITY REQUIREMENTS**

- Under 50% AMI

Income Level	50% AMI
Household Size	
1	\$28,750
2	\$32,850
3	\$36,950
4	\$41,050
5	\$44,350
6	\$47,650
7	\$50,950
8	\$54,200

- Unemployed more than 90 days

**REQUIRED DOCUMENTATION**

- Government-issued ID for all adults in household ages 18 and older
- Birth Certificate, SS card, shot record or school ID for all children in household ages 17 and under
- Application form signed by all adult household members
- Self-Certification of Income Form completed and Signed by all adult household members
- Signed HMIS authorization release form listing all household member
- Duplication of Benefits form signed by all adult household members
- Valid, complete, signed rental agreement (even for utilities only)
- Completed checklist

# H.E.A.R.T. 2.0 Checklist

## *Helping with Emergency Assistance Relief for Tenants 2.0*

Applicant Name \_\_\_\_\_ Date \_\_\_\_\_

**NOTE:** ALL ITEMS REQUIRED FOR APPLICANT ELIGIBILITY

### **PROOF OF INCOME/UNEMPLOYMENT (check all that apply)**

- Paystubs (2 months)
- 2021 Income Tax Return
- 2021 W-2 Forms
- 2021 1099 Forms
- 2022 SSI Award Letter
- Unemployment verification
- Other: \_\_\_\_\_

### **RENTAL ASSISTANCE (No more than 18 months including months assisted with HEART 1.0)**

- Lease and assistance request dates correspond to program eligibility time frame  
**NOTE:** Any past due amount cannot have occurred prior to March 13th, 2020.
- Leased property does not have homestead exemption (verify through Pasco County Property Appraiser's website): <https://search.pascopa.com/>
- Parcel ID card from Pasco County Property Appraiser website
- Rental Authorization form completed by landlord (ensure it matches lease information)
- W9 form completed by landlord (ensure it matches lease information)
- Duplication of Benefits form signed by landlord.

### **UTILITY ASSISTANCE**

- Copy of Utility statement(s) to include:
  - Customer name
  - Account number
  - Service address corresponding to property address
  - Amount due
- Copy of any statement(s) corresponding to past-due amount for which assistance is requested

**NOTE:** Any past due amount cannot have occurred prior to March 1, 2020. Applicant must provide all bills corresponding to any past-due amount. Future utility payments are not eligible for H.E.A.R.T. 2.0 assistance

**NOTE 2:** Only pay actual service charges less payments received, if special agreement or budget billing. Your calculations may start as soon as Applicant became past due, but not before March 13<sup>th</sup>, 2020.



**Items Needed to be Include with Application:**



**1. Identification needed:**

- Driver's license for all household members 18 or older
- Birth Certificates, SS card, shot record, or school ID for all household members under 18,

**2. Proof of income needed (include all that apply):**

- Wage Information (employee paystubs)
- All other Miscellaneous Income (Bank Statements, 2 most recent months)
- Social Security or Disability (2021 Form 1099-SSA)
- Pension/Retirement/Annuity Income (2021 Form 1099R)
- Interest Income (2021 Form 1099INT)
- Dividend Income (2021 Form 1099DIV)
- Rental Income (2021 Schedule E)
- Self-Employed Income (2021 Schedule C)
- All Other Miscellaneous Income (i.e. Child Support, Alimony, etc.)
- 2021 Income Tax Return

**3. Proof of Employment/Unemployment needed (include all that apply):**

- Pay Stubs (most current 2 months)
- Termination Letter
- Notice from Unemployment

**4. Rental Information needed:**

- Full copy of signed lease
- 3-Day Notice and/or Eviction Notice
- Rent Invoice (if applicable)

**5. All adult household members must sign and complete the following forms:**

- Application (one form per household)
- Release of Information Form (one form per household)
- Duplication of Benefit Form (one form per household)

**6. Applying for this funding does not guarantee payment**

For Official Use Only

HMIS Number: \_\_\_\_\_ Date/Time Application Received \_\_\_\_\_

Agency: WPBA Service Provided: \_\_\_\_\_

**Pasco County Community H.E.A.R.T. 2.0**

Helping with Emergency Assistance Relief for Tenants 2.0

**Application**

Applicant Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_ Email: \_\_\_\_\_

City, State, Zip \_\_\_\_\_

**1. HOUSEHOLD COMPOSITION, CHARACTERISTICS AND FAMILIAL STATUS:** As of today, list all members of the household. (Attached a separate sheet is needed.)

Household Member's Name	Relationship to Applicant	Last 4 #s of SSN	Age	Sex M or F	Race (enter all that apply): White, Asian, Black/African American, Native American, Hispanic/Latino	Disabled Y or N	Veteran Status Active, Retired or N/A
	Self						

A. Please check your Income Range based on your family size (for example, if there are 5 people in your household, go to Household of 5; if there are 8 or more in your household go to Household of 8): Please see the list of Income sources to include on page 2.

	30 % AMI	50% AMI	80% AMI
Household of 1:	<input type="checkbox"/> \$0 - \$17,300	<input type="checkbox"/> \$0 - \$28,750	<input type="checkbox"/> \$0 - \$46,000
Household of 2:	<input type="checkbox"/> \$0 - \$19,750	<input type="checkbox"/> \$0 - \$32,850	<input type="checkbox"/> \$0 - \$52,600
Household of 3:	<input type="checkbox"/> \$0 - \$23,030	<input type="checkbox"/> \$0 - \$36,950	<input type="checkbox"/> \$0 - \$59,150
Household of 4:	<input type="checkbox"/> \$0 - \$27,750	<input type="checkbox"/> \$0 - \$41,050	<input type="checkbox"/> \$0 - \$65,700
Household of 5:	<input type="checkbox"/> \$0 - \$32,470	<input type="checkbox"/> \$0 - \$44,350	<input type="checkbox"/> \$0 - \$71,000
Household of 6:	<input type="checkbox"/> \$0 - \$37,190	<input type="checkbox"/> \$0 - \$47,650	<input type="checkbox"/> \$0 - \$76,250
Household of 7:	<input type="checkbox"/> \$0 - \$41,910	<input type="checkbox"/> \$0 - \$50,950	<input type="checkbox"/> \$0 - \$81,500
Household of 8:	<input type="checkbox"/> \$0 - \$46,630	<input type="checkbox"/> \$0 - \$54,200	<input type="checkbox"/> \$0 - \$86,750

**2. INCOME INFORMATION:** Annual family income is required to determine eligibility for public services funded with the federal American Rescue Plan Emergency Rental Assistance Program. **Income is defined as the total gross income for of all family and non-family members 18+ years old living within the household.** All sources of income must be counted from all persons in the household, to include, but is not limited to gross income from employment, net income from self-employment, rental income, interest and dividends, Social Security, annuities, retirement funds, pensions, unemployment benefits, disability benefits, TANF, public assistance, alimony, child support, cash assistance, etc. **Food Stamps are not considered income.**

**A. INCOME INFORMATION:** List all household members and their income. Proof of Income is required. (Attached a separate sheet is needed.)

<u>Household Member's Name</u>	<u>Student</u> Y or N	<u>Source of Income</u> (include employer name if employed)	<u>Payment Basis:</u> Weekly, Bi-Weekly, Monthly, Yearly	<u>Amount</u>

**3. UNEMPLOYMENT STATUS:** Complete for all household members that are unemployed.

<u>Household Member's Name</u>	<u>Date Became Unemployed</u>	<u>Reason for Unemployment</u>	<u>Eligible for Unemployment Benefits</u> Yes or No	<u>Name &amp; Telephone # of Former Employer</u>

Describe how you have experienced financial hardship due to COVID-19.

**4. ASSISTANCE NEEDED:** One or more household members are experiencing housing instability or risk of homelessness due to (check all that apply):

- Rent notice, or eviction notice for past due rent
- Unsafe or unhealthy living conditions
- Past due utilities
- Other risk \_\_\_\_\_

**5. PROPERTY INFORMATION:**

Landlord's Name: \_\_\_\_\_ Landlord's Telephone Number: \_\_\_\_\_  
Landlord's E-mail: \_\_\_\_\_ Month(s) Due \_\_\_\_\_  
Total Amount Due \_\_\_\_\_ Section 8 recipient - circle one: Yes or No

**6. APPLICANT'S CERTIFICATION:** Initial each box

I hereby certify that I am a resident of Pasco County, and I am either a US Citizen, permanent resident, or have been granted legal status.

I hereby certify that I have not previously received assistance for the same services that I am seeking assistance for nor have I used any other federal funds for financial assistance on any of the bills that I am currently seeking assistance on.

I hereby certify that the contact information provided on this application is the same as the contact information listed on the bill(s) for which I am requesting assistance.

I hereby certify, under penalty of perjury, that all information submitted on this form is true and complete. I understand that providing false statements or information for the purpose of obtaining assistance is grounds for termination of housing assistance and is punishable under Chapter 817 of the Florida Statutes as a first-degree misdemeanor.

I hereby certify that I have experienced significant financial hardship during or directly related to, or caused by, COVID-19 on or after March 1st, 2020

**7. APPLICANT'S AUTHORIZATION:**

I authorize the above-named Subrecipient, Sponsor, State or Vendor to obtain information about me and my household that is pertinent to determining my eligibility for participation in the Program. I acknowledge that:

- (1) A photocopy of this form is as valid as the original; AND
- (2) I have the right to review information received using this form; AND
- (3) I have the right to a copy of information provided to the Subrecipient and to request correction of any information I believe to be inaccurate; AND
- (4) All adult household members will sign this form and cooperate with the Subrecipient in the eligibility verification process, AND
- (5) If the applicant falsifies information to obtain assistance, all funds paid on behalf of the applicant must be repaid to the program.

We, the applicant and all other adult household member(s), understand that this Application and Income Certification may be subject to further verification by the agency and/or municipality providing services, and/or Pasco County. We therefore, authorize such verification, and we will provide supporting documents, if necessary. All adult household members will sign this form and cooperate with the Subrecipient in the eligibility verification process. The undersigned further understand(s) that providing false representations herein constitutes an act of fraud.

\_\_\_\_\_  
Signature of applicant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of other adult household member

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of other adult household member

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of other adult household member

\_\_\_\_\_  
Date

Pasco County Continuum of Care and Coalition for the Homeless of Pasco County, Inc.

RELEASE OF INFORMATION

Authorization to Use or Disclose Personal Information including Protected Health Information (PHI)

Head of Household Name:	HoH Social Security Number:	HoH Date of Birth:
Name of Provider Agency: West Pasco Business Assoc.		

I authorize the use or disclosure of personal information, including protected health information, about the individual named above.

I am:  the individual named above  
 a personal representative because the person is a minor, incapacitated, or deceased

West Pasco Business Assoc. participates in the Pasco County Continuum of Care (FL-519) Coordinated Entry System (CES) and/or the Pasco County Homeless Management Information System (HMIS). These systems include organizations that provide homeless and housing assistance and supportive services. As part of HMIS and the CES system, agencies agree to share information about individuals and families with other agencies in order to coordinate services and help a household find and/or keep housing as quickly as possible.

The information to be disclosed may include personal information contained within the Pasco County Homeless Management Information System (HMIS), records from providers detailing my medical conditions and including information on disabilities, mental health, drug abuse, alcoholism, sickle cell anemia, human immunodeficiency virus (HIV) infection, AIDS, and other communicable disease test results and diagnoses. Information contained within the Vulnerability Index and Service Prioritization Decision Assistance Tool (VI-SPDAT), the Service Prioritization Decision Assistance Tool (SPDAT), other assessment forms, and other information collected as part of case management, case planning and case conferencing will be shared in HMIS and as it relates to the coordination of services for housing placement and stability.

Important Rights and Other Required Statements You Should Know

You can revoke this authorization at any time by writing to the Coalition for the Homeless of Pasco County, Inc., 8039 Youth Lane, Port Richey, FL 34668 or by email request to [info@pascohomelesscoalition.org](mailto:info@pascohomelesscoalition.org). If you revoke this authorization, it will not apply to information that has already been used or disclosed.

You have a right to a copy of this authorization once you have signed it. Please keep a copy for your records, or you may ask us for a copy at any time by writing to Coalition for the Homeless of Pasco County, Inc., 8039 Youth Lane, Port Richey, FL 34668 or by email request to [info@pascohomelesscoalition.org](mailto:info@pascohomelesscoalition.org).

If you have any questions about anything on this form, or how to fill it out, we can help. Please call the Coalition for the Homeless of Pasco County, Inc. at 727-842-8605.

This authorization will expire two (2) years from the date this document was signed by the individual or personal representative below.



**By signing this authorization, I am attesting that I understand: (Initial each line)**

\_\_\_\_\_The reason I am being asked to release information.

\_\_\_\_\_My protected health information, including, but not limited to, mental health, drug & alcohol, HIV/AIDS information can be shared with partner providers and HMIS participating organizations. I understand that agencies participating may change from time to time and that a copy of the current list of agencies is available upon request from the Coalition for the Homeless of Pasco County, Inc. at 727-842-8605.

\_\_\_\_\_The HMIS operates over the internet and uses many security protections to ensure the complete confidentiality of my records.

\_\_\_\_\_Signing this authorization is voluntary, and I do not have to agree to authorize any use or disclosure. I understand that the ability to receive services or support is not conditioned upon authorizing this disclosure. However, by not giving authorization to share information, I may not be able to access housing help as quickly as possible and that some services that result from a coordination of activities between providers may be limited in availability. Some agencies require certain questions to be answered in order to determine eligibility for their projects.\*

\_\_\_\_\_The providers that have access to my protected health information are prohibited from re-disclosing information outside of the terms of his release of information form, without my written authorization except as permitted by federal or state law.

Signature \_\_\_\_\_ Date (required) \_\_\_\_\_

**All Dependent(s) that the Legal Guardian Authorizes to Participate in the HMIS:**

Name \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ Name \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_

Name \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ Name \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_

Name \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ Name \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_

**For All Additional Adult Members of the Household, please see Pages 3-5, if necessary.**

**Signature of Personal Representative (if applicable)**

Signature \_\_\_\_\_ Date (required) \_\_\_\_\_

Please describe your relationship to the individual and/or your legal authority to act on behalf of the individual in making decisions related to healthcare and services. You may be asked to provide us with the relevant legal document giving you this authority.

Relationship to the individual (required): \_\_\_\_\_

**Signature of Witness**

Signature \_\_\_\_\_ Date (required) \_\_\_\_\_

\*Agencies may have additional requirements that must be agreed upon by the participant.

**Additional Adult Member: Release of Information Consent**

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Signature \_\_\_\_\_ Date (required) \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

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Signature \_\_\_\_\_ Date (required) \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

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Signature \_\_\_\_\_ Date (required) \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

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Signature \_\_\_\_\_ Date (required) \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

PASCO H.E.A.R.T. 2.0 -- Helping with Emergency Assistance Relief for Tenants 2.0  
AFFIDAVIT OF DUPLICATION OF BENEFITS WITH RECIPIENT AND RETURN OF SECURITY DEPOSIT

This Agreement is entered into by and between West Pasco Business Assoc. [subrecipient] ("Partner") and \_\_\_\_\_ \* (list all adult household members) ("Recipient(s)").

Whereas, Recipient(s) is/are receiving US Department of the Treasury Emergency Rental Assistance funds through Pasco County's Helping with Emergency Assistance Relief for Tenants 2.0 Program (H.E.A.R.T. 2.0) to provide funding to pay rent, deposits, and/or utilities for the property located at \_\_\_\_\_ in an amount not to exceed \$ \_\_\_\_\_ ("Award").

If Recipient(s) meet(s) all other qualifications associated with this application, the Partner will directly pay the following approved funds on his/her/their behalf: (Check box and complete blanks for assistance provided.)

\$ \_\_\_\_\_ to Recipient's landlord to serve as his/her/their rent for the period beginning \_\_\_\_\_ and ending \_\_\_\_\_;

\$ \_\_\_\_\_ to Recipient's landlord to serve as his/her/their security deposit;

\$ \_\_\_\_\_ to Recipient's electric provider for the period beginning \_\_\_\_\_ and ending \_\_\_\_\_;

\$ \_\_\_\_\_ to Recipient's water/sewer provider for the period beginning \_\_\_\_\_ and ending \_\_\_\_\_.

The Partner shall have the right to recoup the Award in the event of a Duplication of Benefits upon the terms, conditions and contingencies herein set forth:

**Federal Benefits and Charitable Donations**

Recipient(s) agrees that if he/she/they receive(s) further federal benefits or charitable donations to pay the Rent/Utilities, the Recipient(s) will report receiving benefits by emailing info@wpba.biz (Partner's e-mail address) or calling (107) 934 - 0940 (Partner's telephone number) within fourteen (14) days of receipt of additional proceeds and/or benefits. If Recipient(s) fails to report additional federal benefits or charitable donations, then the Partner may require the Recipient(s) to immediately repay the Award.

**Duplication of Benefits**

Recipient(s) agrees that if benefits received subsequent to the receipt of the Award are a duplication of benefits proceeds ("Subsequent DOB Proceeds") received from other sources such as federal benefits or charitable donations, that the following shall apply:

1. If the Recipient(s) has/have received the full amount of the Award, any Subsequent DOB Proceeds shall be repaid by Recipient(s) to the Partner up to the amount of the Award.
2. If no portion of the Award has been paid by the Partner to the Recipient(s), any Subsequent DOB Proceeds shall be paid by Recipient(s) to the Partner and used to reduce the Award. If the application of the Subsequent DOB Proceeds would reduce the Award to zero, all Subsequent DOB Proceeds and any funds previously paid by the Recipient(s) to the Partner shall be returned to the Recipient(s), and this Agreement shall terminate.
3. If some portion of the Award has been expended by the Partner to the Recipient, any Subsequent DOB Proceeds shall be used, retained and/or disbursed in the following order: (1) Subsequent DOB Proceeds shall first be paid by Recipient to the Partner to reduce the unexpended portion of the Award; (2) if the application of the Subsequent DOB Proceeds would reduce the unexpended Award to zero, any remaining Subsequent DOB Proceeds shall be applied to expended portion of the Award and retained by the Partner;

- (3) If the application of the Subsequent DOB Proceeds reduces both the unexpended and the expended portions of the Award to zero, any remaining Subsequent DOB Proceeds shall be returned to the Recipient(s), and this Agreement shall terminate.
- 4. If the Partner makes the determination that the Recipient(s) does not qualify to participate in the Program or the Recipient(s) decide(s) not to participate in the Program, the Subsequent DOB Proceeds and any funds previously paid by the Recipient(s) to the Partner that have not been used or obligated by the Program shall be returned to the Recipient(s), and this Agreement shall terminate.
- 5. Once the Partner has recovered an amount equal to the Award, the Partner will reassign to Recipient(s) any rights assigned to the Partner pursuant to this Agreement.

**Income Eligibility**

Recipient(s) certifies that he/she/they has/have provided complete, accurate, and current information regarding household income to demonstrate Recipient's eligibility to receive H.E.A.R.T. funds.

Chapter 817 of the Florida Statutes provides that willful false statements or misrepresentation concerning income and assets or liabilities relating to financial condition is a misdemeanor of the first degree and is punishable by fines and imprisonment provided under Florida Statute §775.082 or 775.083.

Recipient is hereby notified that intentionally or knowingly making a materially false or misleading written statement relating to the Award could result in ineligibility for benefits, action to recover any Award paid to or on behalf of Recipient, and/or a referral to criminal law enforcement.

Recipient represents that all statements and representations made by Recipient regarding household income has been and shall be true and correct.

**Return of Security Deposit**

In the event the Tenant's lease is terminated for any reason within four months (120 days) of the effective date of the lease, the landlord shall return the security deposit to the Partner. To the extent the security deposit is not returned to the Tenant, it should be returned to the Partner.

**Enforcement**

The Recipient(s) and the Partner acknowledge that the Partner has the right and responsibility to enforce this Agreement. The Partner may assign its rights under this Agreement to Pasco County, such assignment shall give Pasco County the same rights as those provided to the Partner in this Agreement.

IN WITNESS WHEREOF, the undersigned recipient(s) has/have affixed his/her signature(s) and seal(s) this \_\_\_\_\_ day of \_\_\_\_\_, 2022.

\_\_\_\_\_  
Applicant/Recipient

\_\_\_\_\_  
Other Adult Household Member/Recipient

\_\_\_\_\_  
Other Adult Household Member/Recipient

\_\_\_\_\_  
Other Adult Household Member/Recipient

\_\_\_\_\_  
Other Adult Household Member/Recipient