

HUD UTILITY MODEL INSTRUCTIONS

I. Introduction

The HUD Utility Schedule Model has been developed to provide a consistent basis for determining utility schedules, using form HUD-52667, throughout the U.S. This spreadsheet model is organized into three tabs and is designed to work with Microsoft Excel.

The first tab is the “Location” tab which provides a drop down menu by Public Housing Agency (PHA) number. Selection of the PHA will automatically provide the name of the housing authority and populate the weather data used in the model’s calculations. The “Form Date” on this tab is the date of the utility schedule and is an input. There is a default to include air conditioning in the utility schedule, but the user may uncheck the box if this does not apply.

The second tab is the “Tariffs” tab which is where all the utility cost data must be entered. A first time user should make the “Previous” and the “Current” column the same. The model will use the data from the Current column for its calculation. The name of the utility provider, the rate name and the effective date of the tariff are all inputs. The measurement unit is a drop down box that must be chosen and for electricity and natural gas, separate summer and heating tariffs are possible.

The third and final tab is “Utility Allowance Computation” and there are no inputs to this tab. There are three drop down boxes which select the unit type, whether or not a standard electric rate is used and if the unit is energy star certified. The date of this form comes from the Form Date file on the Locations tab.

II. Help on Tariffs Tab

A majority of the effort in using this model is to update the rates paid for utilities. This is the purpose of the “Tariffs” tab. The “Tariffs” tab allows you to update the tariffs for electricity, natural gas, fuel oil, liquefied petroleum gas (LPG), water, sewer, trash and certain appliance fees. The tab has columns for the Current and Previous values for almost all of the entries. Only the entries under the Current column are used in calculating the values that appear on the forms. The entries in the Previous column are ignored and are there only for reference and to determine how much the tariff has changed. All energy and non-energy related costs are entered on this tab. Most utilities allow you to download a tariff or rate book from their web site. After you do this, get a bill to use as an example and determine all of the components that make up the bill. At times the tariff is broken into a main tariff and many riders. Some utilities describe taxes in the rate book and some do not, so check a sample bill.

In some locations, utilities have become deregulated and multiple companies may be involved in providing this service. This is especially likely for natural gas and electric utilities. While the spreadsheet does not have any specific entries for deregulated utilities, it is easy to use the spreadsheet with them. To enter deregulated utilities, simply add up the charges for each kWh or other unit of measure and enter the combined total. For example, if an electric generating company charges 4 cents per kWh and the electric distribution company charges 3 cents per kWh, simply add the two charges together for 7 cents per kWh. If the companies have multiple block rates, these charges need to be combined for each rate block.

1. Standard Electric Utility Tariff –

Utility Name and Rate Name – enter the name or an abbreviation of the name for the utility that provides electricity and for the specific rate to be used in the calculations. Many utilities have multiple rates that could be used by residential customers and you should choose one that is the most typical.

Rate Effective Date – often utilities will use the same name for a tariff even though they may change the values. Entering an effective date here will allow you to understand what version of the tariff you are using.

First Month of Summer and Last Month of Summer – select from the pull down lists the months that are the first and last months of the summer period as defined in the electric tariff. If the tariff does not vary by season, use only the “summer” blocks and set the summer period from January through December. If the tariff is seasonal but starts mid-month, make sure the number of months in the tariff that are summer and the number of months here are equivalent since the number of months is more important than exactly when in each month the tariff changes. If your spreadsheet program is not Excel, you may not see the drop down list of choices. If that is the case, just enter the month number in the rows below each input.

Monthly Charges – enter the value charged for electric service. This is sometimes called a monthly charge or a service charge.

Size of XXX Block – This entry is repeated for the first, second, third and fourth blocks of the tariff in the summer and in the winter. If the tariff does not have block rates that vary by season, then only enter values for the summer entries. The size of a block is important for tariffs that have “stepped” blocks. A stepped tariff charges a certain amount for each kWh in the first group of kWh, and different charges for greater use. They are often expressed as 5 cents per kWh for the first 500 kWh and 4 cents per kWh for the remaining kWh. For this case you would enter “500” in the “Size of First Block” and “remaining” in the “Size of the Second Block”. You could also enter a large number instead of the word “remaining” in the “Size of the Second Block” field, which will indicate that the rest of the kWh should be charged at that price. Since some utilities have multiple blocks in their tariffs, up to four blocks are provided. If more blocks are

part of the tariff, average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only.

Cost of XXX Block – This entry is repeated for the first, second, third, and fourth blocks of the tariff in the summer and in the winter. If the tariff does not have blocks that vary by season, only enter values for the summer entries. The cost of a block is important for tariffs that have “stepped” blocks. A stepped tariff charges a certain amount for each kWh in the first group of kWh, and different charges for greater use. They are often expressed as 5 cents per kWh for the first 500 kWh and 4 cents per kWh for the remaining kWh. For this case you would enter 0.05 in the “Cost of First Block” a 0.04 in the “Cost of the Second Block”. Since some utilities have multiple blocks in their tariffs, up to four blocks are provided. If more blocks are part of the tariff, average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only. If multiple companies are involved in providing the utility service, such as when the utilities are deregulated, then add up the costs for each company for that block.

Extra Charges – An extra fee that is charged by the utility for every kWh that is sold. This is often expressed as a fuel cost adjustment, an energy cost adjustment, or a surcharge. Credits are often expressed as a fuel cost adjustment, an energy cost adjustment or a surcharge. Credits are often provided on the basis of every kWh and can be entered as negative numbers. If multiple extra charges exist in the tariff, then add them up.

Taxes – This is expressed as a percent. Don’t format the cell in Excel as a “percent” format. For a 1.2% tax, simply enter “1.2”. The tax is calculated after calculating a subtotal that includes the block charges, the monthly charge and the extra charges.

2. Special Electric Heating/All Electric Tariff –

Use Electric Heat Tariff – some utilities have special discounted tariffs for customers that heat with electricity or use only electricity and no other source of energy in their homes. If that is the case, and you want to provide special 52667 forms for those customers, check this box. You may need to make more copies of the 52667 tabs and specify that some use the special electric heating rate.

Utility Name and Rate Name – enter the name or an abbreviation of the name for the utility that provides electricity and for the specific rate to be used in the calculations. Many utilities have multiple rates that could be used by residential customers and you should choose one that is the most typical.

Rate Effective Date – often utilities will use the same name for a tariff even though they may change the values. Entering an effective date here will allow you to understand what version of the tariff you are using.

First Month of Summer and Last Month of Summer – select from the pull down lists the months that are the first and last months of the summer period as defined in the electric tariff. If the tariff does not vary by season, use only the “summer” blocks and set the summer period from January through December. If the tariff is seasonal but starts mid-month, make sure the number of months in the tariff that are summer and the number of months here are equivalent since the number of months is more important than exactly when in each month the tariff changes. If your spreadsheet program is not Excel, you may not see the drop down list of choices. If that is the case, just enter the month number in the rows below each input.

Monthly Charges – enter the value charged for electric service. This is sometimes called a monthly charge or a service charge.

Size of XXX Block – This entry is repeated for the first, second, third and fourth blocks of the tariff in the summer and in the winter. If the tariff does not have block rates that vary by season, then only enter values for the summer entries. The size of a block is important for tariffs that have “stepped” blocks. A stepped tariff charges a certain amount for each kWh in the first group of kWh, and different charges for greater use. They are often expressed as 5 cents per kWh for the first 500 kWh and 4 cents per kWh for the remaining kWh. For this case you would enter “500” in the “Size of First Block” and “remaining” in the “Size of the Second Block”. You could also enter a large number instead of the word “remaining” in the “Size of the Second Block” field, which will indicate that the rest of the kWh should be charged at that price. Since some utilities have multiple blocks in their tariffs, up to four blocks are provided. If more blocks are part of the tariff, average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only.

Cost of XXX Block – This entry is repeated for the first, second, third, and fourth blocks of the tariff in the summer and in the winter. If the tariff does not have blocks that vary by season, only enter values for the summer entries. The cost of a block is important for tariffs that have “stepped” blocks. A stepped tariff charges a certain amount for each kWh in the first group of kWh, and different charges for greater use. They are often expressed as 5 cents per kWh for the first 500 kWh and 4 cents per kWh for the remaining kWh. For this case you would enter 0.05 in the “Cost of First Block” a 0.04 in the “Cost of the Second Block”. Since some utilities have multiple blocks in their tariffs, up to four blocks are provided. If more blocks are part of the tariff, average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only. If multiple companies are involved in providing the utility service, such as when the utilities are deregulated, then add up the costs for each company for that block.

Extra Charges – An extra fee that is charged by the utility for every kWh that is sold. This is often expressed as a fuel cost adjustment, an energy cost adjustment, or a surcharge. Credits are often expressed as a fuel cost adjustment, an energy cost adjustment or a surcharge. Credits are often provided on the basis of every kWh and can

be entered as negative numbers. If multiple extra charges exist in the tariff, then add them up.

Taxes – This is expressed as a percent. Don't format the cell in Excel as a "percent" format. For a 0.9% tax, simply enter "0.9". The tax is calculated after calculating a subtotal that includes the block charges, the monthly charge and the extra charges.

3. Standard Natural Gas Utility Tariff –

Utility Name and Rate Name – enter the name or an abbreviation of the name for the utility that provides natural gas and for the specific rate to be used in the calculations. Many utilities have multiple rates that could be used by residential customers and you should choose one that is the most typical.

Rate Effective Date – often utilities will use the same name for a tariff even though they may change the values. Entering an effective date here will allow you to understand what version of the tariff you are using.

Measurement Units – natural gas utilities provide natural gas on the basis of one of several different units. Select the units used by the utility in the rate. Notice that the units correspondingly change on many of the remaining fields in the tariff. Changing the measurement units will not change the values entered in the rest of the rate. If your spreadsheet program is not Excel and the pull down list is not seen, enter 1 for therms, 2 for CCF, 3 for MCF, and 4 for MMBtu.

First Month of Summer and Last Month of Summer – select from the pull down lists the months that are the first and last months of the summer period as defined in the natural gas tariff. If the tariff does not vary by season, use only the "summer" blocks and set the summer period from January through December. If the tariff is seasonal but starts mid-month, make sure the number of months in the tariff that are summer and the number of months here are equivalent since the number of months is more important than exactly when in each month the tariff changes. If your spreadsheet program is not Excel, you may not see the drop down list of choices. If that is the case, just enter the month number in the rows below each input.

Monthly Charges – enter the value charged for natural gas service. This is sometimes called a monthly charge or a service charge.

Size of XXX Block – This entry is repeated for the first, second, third and fourth blocks of the tariff in the summer and in the winter. If the tariff does not have block rates that vary by season, then only enter values for the summer entries. The size of a block is important for tariffs that have "stepped" blocks. A stepped tariff charges a certain amount for each therm in the first group of therms, and different charges for greater use. They are often expressed as 80 cents per therm for the first 10 therms and 70 cents per therm for the remaining therms. For this case you would enter "10" in the "Size of First

Block” and “remaining” in the “Size of the Second Block”. You could also enter a large number instead of the word “remaining” in the “Size of the Second Block” field, which will indicate that the rest of the therms should be charged at that price. Since some utilities have multiple blocks in their tariffs, up to four blocks are provided. If more blocks are part of the tariff, average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only.

Cost of XXX Block – This entry is repeated for the first, second, third, and fourth blocks of the tariff in the summer and in the winter. If the tariff does not have blocks that vary by season, only enter values for the summer entries. The cost of a block is important for tariffs that have “stepped” blocks. A stepped tariff charges a certain amount for each therm in the first group of therms, and different charges for greater use. They are often expressed as 80 cents per therm for the first 10 therms and 70 cents per therm for the remaining therms. For this case you would enter 0.80 in the “Cost of First Block” a 0.70 in the “Cost of the Second Block”. Since some utilities have multiple blocks in their tariffs, up to four blocks are provided. If more blocks are part of the tariff, average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only. If multiple companies are involved in providing the utility service, such as when the utilities are deregulated, then add up the costs for each company for that block.

Extra Charges – An extra fee that is charged by the utility for every therm that is sold. This is often expressed as a fuel cost adjustment, an energy cost adjustment, or a surcharge. Credits are often expressed as a fuel cost adjustment, an energy cost adjustment or a surcharge. Credits are often provided on the basis of every therm and can be entered as negative numbers. If multiple extra charges exist in the tariff, then add them up.

Taxes – This is expressed as a percent. Don’t format the cell in Excel as a “percent” format. For a 0.9% tax, simply enter “0.9”. The tax is calculated after calculating a subtotal that includes the block charges, the monthly charge and the extra charges.

4. Fuel Oil Delivery Contract –

Supplier Name – enter the name or an abbreviation of the name for the supplier for fuel oil.

Effective Date – entering an effective date here will allow you to understand what version of the contract you are using.

Monthly Charges – enter the amount that the fuel oil supplier charges to provide service. This is sometime called a monthly charge or a service charge.

Size of XXX Block – This entry is repeated for the first, second, third and fourth blocks of the contract. A stepped contract charges a certain amount for each gallon in the first

group of gallons, and different charges for greater use. They are often expressed as 2.50 dollars per gallon for the first 50 gallons and 2.40 dollars per gallon for the remaining gallons. For this case you would enter “50” in the “Size of First Block” and “remaining” in the “Size of the Second Block”. You could also enter a large number instead of the word “remaining” in the “Size of the Second Block” field, which will indicate that the rest of the gallons should be charged at that price. Up to four blocks are provided, if more blocks are part of the contract, then average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only.

Cost of XXX Block – This entry is repeated for the first, second, third, and fourth blocks of the contract. A stepped contract charges a certain amount for each gallon in the first group of gallons, and different charges for greater use. They are often expressed as 2.50 dollars per gallon for the first 50 gallons and 2.40 dollars per gallon for the remaining gallons. For this case you would enter 2.50 in the “Cost of First Block” 2.40 in the “Cost of the Second Block”. Up to four blocks are provided, if more blocks are part of the contract, then average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only.

Extra Charges – An extra fee that is charged by the utility for every gallon that is sold. This is often expressed as a fuel cost adjustment, an energy cost adjustment, or a surcharge. Credits are often expressed as a fuel cost adjustment, an energy cost adjustment or a surcharge. Credits are often provided on the basis of every gallon and can be entered as negative numbers. If multiple extra charges exist in the contract, then add them up.

Taxes – This is expressed as a percent. Don’t format the cell in Excel as a “percent” format. For a 3% tax, simply enter “3”. The tax is calculated after calculating a subtotal that includes the block charges, the monthly charge and the extra charges.

5. Liquefied Petroleum Gas Delivery Contract –

Supplier Name – enter the name or an abbreviation of the name for the supplier for liquefied petroleum gas (LPG).

Effective Date – entering an effective date here will allow you to understand what version of the contract you are using.

Monthly Charges – enter the amount that the LPG supplier charges to provide service. This is sometime called a monthly charge or a service charge.

Size of XXX Block – This entry is repeated for the first, second, third and fourth blocks of the contract. A stepped contract charges a certain amount for each pound in the first group of pounds, and different charges for greater use. They are often expressed as 20 cents per pound for the first 500 pounds and 18 cents per pound for the remaining

pounds. For this case you would enter “500” in the “Size of First Block” and “remaining” in the “Size of the Second Block”. You could also enter a large number instead of the word “remaining” in the “Size of the Second Block” field, which will indicate that the rest of the gallons should be charged at that price. Up to four blocks are provided, if more blocks are part of the contract, then average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only.

Cost of XXX Block – This entry is repeated for the first, second, third, and fourth blocks of the contract. A stepped contract charges a certain amount for each pound in the first group of pounds, and different charges for greater use. They are often expressed as 20 cents per pound for the first 500 pounds and 18 cents per pound for the remaining pounds. For this case you would enter 0.20 in the “Cost of First Block” a 0.18 in the “Cost of the Second Block”. Up to four blocks are provided, if more blocks are part of the contract, then average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only.

Extra Charges – An extra fee that is charged by the utility for every pound that is sold. This is often expressed as a surcharge. Credits are often provided on the basis of every pound and can be entered as negative numbers. If multiple extra charges exist in the contract, then add them up.

Taxes – This is expressed as a percent. Don’t format the cell in Excel as a “percent” format. For a 1.2% tax, simply enter “1.2”. The tax is calculated after calculating a subtotal that includes the block charges, the monthly charge and the extra charges.

6. Water Supply Utility Tariff –

Supplier Name – enter the name or an abbreviation of the name for the water supplier.

Effective Date – entering an effective date here will allow you to understand what version of the contract you are using.

Measurement Units –utilities provide water on the basis of one of several different units. Select the units used by the utility in the rate. Notice that the units correspondingly change on many of the remaining fields in the tariff. Changing the measurement units will not change the values entered in the rest of the rate. If your spreadsheet program is not Excel and the pull down list is not seen, enter 1 for cubic feet and 2 for gallons.

Monthly Charges – enter the amount that the water supplier charges to provide service. This is sometime called a monthly charge or a service charge.

Size of XXX Block – This entry is repeated for the first, second, third and fourth blocks of the tariff. The size of a block is important for tariffs that have “stepped” blocks. A stepped tariff charges a certain amount for each cubic foot in the first group of cubic feet,

and different charges for greater use. They are often expressed as 5 cents per cubic foot for the first 500 cubic feet and 4 cents per cubic foot for the remaining usage. For this case you would enter “500” in the “Size of First Block” and “remaining” in the “Size of the Second Block”. You could also enter a large number instead of the word “remaining” in the “Size of the Second Block” field, which will indicate that the rest of the water usage should be charged at that price. Since some suppliers have multiple blocks in their tariffs, up to four blocks are provided. If more blocks are part of the tariff, average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only.

Cost of XXX Block – This entry is repeated for the first, second, third, and fourth blocks of the tariff. If the tariff does not have blocks that vary by season, only enter values for the summer entries. The cost of a block is important for tariffs that have “stepped” blocks. A stepped tariff charges a certain amount for each cubic foot in the first group of cubic feet, and different charges for greater use. They are often expressed as 5 cents per cubic foot for the first 500 cubic feet and 4 cents per cubic foot for the remaining usage. For this case you would enter 0.05 in the “Cost of First Block” a 0.04 in the “Cost of the Second Block”. Since some utilities have multiple blocks in their tariffs, up to four blocks are provided. If more blocks are part of the tariff, average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only.

Extra Charges – An extra fee that is charged by the utility for every cubic foot that is sold. This is often expressed as a surcharge. Credits are often provided on the basis of every cubic foot and can be entered as negative numbers. If multiple extra charges exist in the contract, then add them up.

Taxes – This is expressed as a percent. Don’t format the cell in Excel as a “percent” format. For a 1.2% tax, simply enter “1.2”. The tax is calculated after calculating a subtotal that includes the block charges, the monthly charge and the extra charges.

7. Sewer Tariff –

Sewer Charge Included in Water Tariff – check the box if the water tariff (described above) already includes the sewer charge. This is the case for many locations. If this box is checked, no other inputs are necessary.

Supplier Name – enter the name or an abbreviation of the name for the sewer company.

Effective Date – entering an effective date here will allow you to understand what version of the contract you are using.

Measurement Units –utilities provide sewer service on the basis of one of several different units. Select the units used by the utility in the rate. Notice that the units correspondingly change on many of the remaining fields in the tariff. Changing the measurement units will not change the values entered in the rest of the rate. If your

spreadsheet program is not Excel and the pull down list is not seen, enter 1 for cubic feet and 2 for gallons.

Monthly Charges – enter the amount that the sewer utility charges to provide service. This is sometime called a monthly charge or a service charge.

Size of XXX Block – This entry is repeated for the first, second, third and fourth blocks of the tariff. The size of a block is important for tariffs that have “stepped” blocks. A stepped tariff charges a certain amount for each cubic foot in the first group of cubic feet, and different charges for greater use. They are often expressed as 5 cents per cubic foot for the first 500 cubic feet and 4 cents per cubic foot for the remaining usage. For this case you would enter “500” in the “Size of First Block” and “remaining” in the “Size of the Second Block”. You could also enter a large number instead of the word “remaining” in the “Size of the Second Block” field, which will indicate that the rest of the usage should be charged at that price. Since some suppliers have multiple blocks in their tariffs, up to four blocks are provided. If more blocks are part of the tariff, average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only.

Cost of XXX Block – This entry is repeated for the first, second, third, and fourth blocks of the tariff. If the tariff does not have blocks that vary by season, only enter values for the summer entries. The cost of a block is important for tariffs that have “stepped” blocks. A stepped tariff charges a certain amount for each cubic foot in the first group of cubic feet, and different charges for greater use. They are often expressed as 5 cents per cubic foot for the first 500 cubic feet and 4 cents per cubic foot for the remaining usage. For this case you would enter 0.05 in the “Cost of First Block” a 0.04 in the “Cost of the Second Block”. Since some suppliers have multiple blocks in their tariffs, up to four blocks are provided. If more blocks are part of the tariff, average the cost of some of the blocks together and combine their sizes. If the rate is not a stepped rate, enter values for the first block only.

Extra Charges – An extra fee that is charged by the utility for every cubic foot that is sold. This is often expressed as a surcharge. Credits are often provided on the basis of every cubic foot and can be entered as negative numbers. If multiple extra charges exist in the contract, then add them up.

Taxes – This is expressed as a percent. Don’t format the cell in Excel as a “percent” format. For a 1.2% tax, simply enter “1.2”. The tax is calculated after calculating a subtotal that includes the block charges, the monthly charge and the extra charges.

8. Trash Collection Fees – enter the average monthly fees for different size dwelling using for trash collection.

9. Range/Microwave Fees – enter the average monthly cost for renting or financing the purchase of a range and microwave oven for different size dwelling unit.

10. Refrigerator Fees – enter the average monthly cost for renting or financing the purchase of a refrigerator for different size dwelling units.

11. Other Fees – enter the average monthly fees for different size dwelling units for any other fees.