

**AGENDA**  
*HOUSING CHOICE VOUCHER SPECIALIST*  
**HOTMA Now**  
INTAKE, OCCUPANCY AND RENT CALCULATION ESSENTIALS

**DAY ONE**  
ELIGIBILITY

- |       |   |
|-------|---|
| 8:00  | Registration  |
| 8:30  | Welcome and Introductions   |
| 8:45  | Course Overview/Learning Outcomes   |
|       | Basic Program Information   |
|       | <ul style="list-style-type: none"><li>▪ Program Components</li><li>▪ Rules and References for HCV<ul style="list-style-type: none"><li>• Learning Activity</li></ul></li><li>▪ PHA Administrative Plan</li><li>▪ Overview of HOTMA</li><li>▪ Fair Housing, Reasonable Accommodation, VAWA</li></ul> |
|       | Chapter 1 Knowledge Check   |
| 10:15 | Break   |
| 10:30 | Waiting List Management   |
|       | <ul style="list-style-type: none"><li>▪ Initial Applications</li><li>▪ Form HUD 92006</li><li>▪ Specials Admissions</li></ul>   |
|       | Preferences   |
|       | Full Application Stage  |
|       | Chapter 2 Knowledge Check   |
| 12:00 | Lunch (on your own)   |

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**DAY ONE**  
**ELIGIBILITY (continued)**

- 1:00      Evaluating Eligibility**  
**Family Type**
- Definition of Family
  - Disabled/Displaced/Elderly Families
  - Child Custody
  - Household vs Family
  - Learning Activity
- Social Security Numbers**  
**Restriction on Assistance to Noncitizens**
- Learning Activity
- 2:30      Break**
- 2:45      Income Limits**
- Eligibility of Students
    - Learning Activity
- Denial of Assistance**
- Screening and Eviction Rule
  - Mandatory and Discretionary Denials
  - EIV Reports
  - Consideration of Circumstances
  - Informal Reviews
- Chapter 3 Knowledge Check**
- 5:00      End of Day One**

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**DAY TWO**  
**OCCUPANCY**

- 8:00**      **Voucher Issuance**
- Subsidy Standards
    - Learning Activity
  - General Procedures
    - Extensions
    - Suspensions
- HUD Required Briefings**
- Oral Briefing
  - Briefing Packet
- Family Obligations**
- What the Family Must Do
  - What the Family Must Not Do
  - Learning Activity
- Chapter 4 Knowledge Check**
- Leasing**
- Where the Family Can Lease**
- Initial Steps in the Leasing Process**
- The Owner's Lease
    - Learning Activity
- 10:15**      **Break**
- 10:30**      **Tenancy Addendum**
- Learning Activity
- Disapproval of Owner**
- Final Steps in Leasing Process**
- HAP Contract**
- Learning Activity
- 12:00**      **Lunch (on your own)**

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**DAY TWO**  
**OCCUPANCY (continued)**

- |      |  |
|------|--|
| 1:00 | <b>Rent to Owner</b> <ul style="list-style-type: none"><li>▪ Rent Increases</li><li>▪ Rent Reasonableness</li></ul> <b>Chapter 5 Knowledge Check</b>   |
| 2:30 | <b>Break</b>   |
| 2:45 | <b>Annual Activities</b> <ul style="list-style-type: none"><li>▪ Annual Reexaminations</li><li>▪ Interim Reexaminations</li><li>▪ Moves</li><li>▪ Inspections</li></ul> <b>Chapter 6 Knowledge Check</b><br><b>Terminations</b> <ul style="list-style-type: none"><li>▪ Learning Activity</li></ul> <b>Informal Hearings</b><br><b>Chapter 7 Knowledge Check</b> |
| 5:00 | <b>End of Day Two</b>  |

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**DAY THREE**  
OCCUPANCY (continued)

- 8:00**      **Portability**
- Overview
  - Limitations and Residency
  - Responsibilities of IHA, RHA and Family
  - Portability Billing
  - Penalties
  - Learning Activity
- Chapter 8 Knowledge Check**

**RENT CALCULATION**

- Form HUD 50058 Overview**
- 10:15**      **Break**
- 10:30**      **Annual Income**
- Income of Various Household Members
  - Earned Income
  - Seasonal Income
  - Income of Students
- 12:00**      **Lunch (on your own)**
- 1:00**      **Annual Income (continued)**
- Periodic Payments
  - Nonrecurring Income
  - Zero Income Families
- 2:30**      **Break**
- 2:45**      **Income (continued)**
- Imputed Welfare Income
  - Other Types of Income
- 5:00**      **End of Day Three**

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**DAY FOUR**  
**RENT CALCULATION (continued)**

- 8:00      Assets**
- Type of Assets
    - Savings and Checking Accounts
    - ABLE Accounts
    - Retirement Accounts
    - Jointly Owned Assets
    - Trusts
  - Income from Assets
    - Market Value
    - Cash Value
    - Anticipated Income
  - Assets Disposed of for Less than Fair Market Value
- 10:15      Break**
- 10:30      Adjusted Income Calculation**
- Dependent Allowance
  - Elderly/Disabled Allowance
  - Child Care Allowance
  - Disability Assistance Expenses
  - Health and Medical Care Expenses
- 12:00      Lunch (on your own)**
- 1:00      Verification**
- Consent Forms
  - Use of Other Programs' Income Determinations
  - Streamlining Verification of Fixed Income
  - Hierarchy of Verification Methods
- 2:30      Break**
- 2:45      TTP**
- Subsidy and Family Share Calculation**
- Minimum Rent
  - Payment Standard Rent Calculation
  - Maximum Share at Initial Occupancy
  - Prorated Rent
- 5:00      End of Day Four**

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**DAY FIVE**  
RENT CALCULATION (continued)

8:00	Rent Calculation Quiz Case Studies
10:15	Break
10:30	Case Studies (continued) Certificates of Participation Awarded
12:00	Lunch (on your own)
1:00	Optional Certification Exam
4:00	End of Exam