

AGENDA
HOUSING CHOICE VOUCHER SPECIALIST
HOTMA
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">▪ Program Components▪ Rules and References for HCV<ul style="list-style-type: none">• Learning Activity▪ PHA Administrative Plan▪ Overview of HOTMA▪ Fair Housing, Reasonable Accommodation, VAWA |
| | Chapter 1 Knowledge Check |
| 10:15 | Break |
| 10:30 | Waiting List Management |
| | <ul style="list-style-type: none">▪ Initial Applications▪ Form HUD 92006▪ Specials Admissions |
| | 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 | Rent to Owner <ul style="list-style-type: none">▪ Rent Increases▪ Rent Reasonableness Chapter 5 Knowledge Check |
| 2:30 | Break |
| 2:45 | Annual Activities <ul style="list-style-type: none">▪ Annual Reexaminations▪ Interim Reexaminations▪ Moves▪ Inspections Chapter 6 Knowledge Check |
| 5:00 | End of Day Two |

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DAY THREE
OCCUPANCY (continued)

- 8:00** **Terminations**
- Mandatory and Discretionary Denials
 - Termination of the HAP Contract
- Informal Hearings**
- Chapter 7 Knowledge Check**
- Portability**
- Overview
 - Limitations and Residency
 - Responsibilities of IHA, RHA and Family
 - Portability Billing
 - Penalties
 - Learning Activity
- Chapter 8 Knowledge Check**
- 10:15** **Break**
- 10:30** **Rent Calculation**
- Form HUD 50058 Overview**
- Annual Income**
- Income of Various Household Members
 - Earned Income
 - Income of Students
- 12:00** **Lunch (on your own)**
- 1:00** **Rent Calculation (continued)**
- Annual Income**
- Periodic Payments
 - Nonrecurring Income
 - Imputed Welfare Income
 - Zero Income Families
- 2:30** **Break**
- 2:45** **Income (continued)**
- Other Types of Income
- Assets**
- Real Property vs Personal Property
 - Savings and Checking Accounts
- 5:00** **End of Day Three**

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DAY FOUR
RENT CALCULATION (continued)

- 8:00 Assets**
- Jointly Owned Assets
 - Trusts
 - Tax Refunds
 - Retirement Accounts
 - Other Assets
 - Income from Assets
 - Assets Disposed of for Less than Fair Market Value
 - Asset Limitation
- 10:15 Break**
- 10:30 Adjusted Income Calculation**
- Dependent Allowance
 - Elderly/Disabled Allowance
 - Child Care Allowance
 - Disability Assistance Expenses
 - Health and Medical Care Expenses
 - Hardship Exemptions
 - Permissive Deductions
- 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 Calculating Income at Annual**
- SS COLA
 - Steps to Calculate Income at Annual
 - Example Calculations
- 5:00 End of Day Four**

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DAY FIVE
RENT CALCULATION (continued)

- | | |
|-------|---|
| 8:00 | TTP
Subsidy and Family Share Calculation <ul style="list-style-type: none">▪ Minimum Rent▪ Payment Standard Rent Calculation▪ Maximum Share at Initial Occupancy▪ Prorated Rent |
| 10:15 | Break |
| 10:30 | Rent Calculation Quiz
Case Studies |
| 12:00 | Lunch (on your own) |
| 1:00 | Optional Certification Exam |
| 4:00 | End of Exam |