

AGENDA
NMA HOTMA SUMMIT

DAY ONE

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|--------------|--|
| 8:00 | Registration |
| 8:30 | Welcome and Introductions |
| 8:45 | Overview of HOTMA for PIH Programs <ul style="list-style-type: none">▪ History of HOTMA▪ Affected Programs▪ Implementation Timelines▪ HOTMA Resources |
| 10:00 | Break |
| 10:20 | Calculating Income <ul style="list-style-type: none">▪ New Definition of Annual Income▪ Using Outside Determinations of Income▪ Projecting Income for New Admissions and Interim Reexams▪ Using Past Income for Annual Reexams▪ Learning Activity: Calculating Income |
| 12:00 | Lunch (on your own) |

AGENDA

NMA HOTMA SUMMIT

DAY ONE (continued)

- 1:00 Review of Changes to Income under HOTMA**
- Student Financial Assistance
 - Learning Activity: Calculating Student Financial Assistance
 - Earned Income
 - Earned Income Disallowance
 - Nonrecurring Income
 - Certain Disability Payments
 - Training Program Income
- 2:30 Break**
- 2:45 Assets**
- When Net Cash Value is \$50,000 or Less
 - When Net Cash Value is Over \$50,000
 - Asset Limitation
 - Real Property Ownership Limitation
 - Necessary Items of Personal Property
 - Trusts
 - Retirement Accounts
 - Learning Activity: Assets
- 5:00 End of Day One**

AGENDA

NMA HOTMA SUMMIT

DAY TWO

- 8:00 **Calculating Adjusted Income**
- Dependent Allowance
 - Health and Medical Care Expenses/Disability Assistance Expenses
 - Hardship Exemptions
 - Learning Activity: Adjusted Income
- 10:10 **Break**
- 10:30 **Interims**
- Mandatory Interims
 - Discretionary Interims
 - Effective Dates
 - Learning Activity: Interims
- Other Changes**
- HUD Form 9886
 - Enterprise Income Verification (EIV)
 - De Minimis Errors
- Q & A Session**
- 11:45 **Certificates of Participation Awarded**
- 12:00 **End of Session**