

**AGENDA**  
*PUBLIC HOUSING SPECIALIST TRAINING*  
**INTAKE, OCCUPANCY AND RENT CALCULATION ESSENTIALS**

**DAY ONE**

- 8:00      **Registration**
- 8:30      **Welcome and Introductions**
- 8:45      **Course Overview/Learning Outcomes**
- Program Components**
- Key Relationships
  - Reading Regulations
  - Key Program Documents
  - Intake & Occupancy Cycle
- 10:15     **Break**
- 10:30     **PHA Responsibilities**
- Fair Housing/Reasonable Accommodation**
- 12:00     **Lunch (on your own)**
- 1:00      **Waiting List Management**
- Initial Applications
  - Organizing Waiting Lists
  - Site-Based Waiting Lists
- Preferences**
- 2:30      **Break**
- 2:45      **Factors of Eligibility**
- Family Type
    - Definition of Family
    - Disabled/Displaced/Elderly
  - Social Security Numbers
  - Overview of Noncitizens Rule
  - Income Limits
- Occupancy Standards**
- 5:00      **End of Day One**

**AGENDA**  
*PUBLIC HOUSING SPECIALIST TRAINING*  
**INTAKE, OCCUPANCY AND RENT CALCULATION ESSENTIALS**

**DAY TWO**

- 8:00**      **Tenant Selection**
- Income Targeting
  - Deconcentration of Poverty
- Evaluating Final Eligibility**
- Application Inquiries
  - Applicant Interviews/Forms
  - Suitability
  - Screening/Denial of Assistance
  - Ineligible Applicants
  - Informal Hearings
- 10:15**      **Break**
- 10:30**      **Admissions**
- Selection Procedures/Offer System
- Leasing**
- Preparation for Lease-up
- 12:00**      **Lunch (on your own)**
- 1:00**      **Leasing (continued)**
- Contents of the Lease
  - Lease Terminology
- 2:30**      **Break**
- 2:45**      **Annual and Interim Reexaminations**
- Community Service
- Pets**
- 5:00**      **End of Day Two**

**AGENDA**  
*PUBLIC HOUSING SPECIALIST TRAINING*  
**INTAKE, OCCUPANCY AND RENT CALCULATION ESSENTIALS**

**DAY THREE**

- 8:00**      **Terminations**
- Termination of Lease
  - Evictions
  - Grievance Process
- RENT CALCULATION**
- 9:30**      **Form HUD 50058 Overview**  
**Annual Income**
- Income of Various Household Members
- 10:15**      **Break**
- 10:30**      **Annual Income**
- Earned Income
  - Income of Students
- 12:00**      **Lunch (on your own)**
- 1:00**      **Annual Income**
- Periodic Payments and Nonrecurring Income
  - Imputed Welfare Income
- 2:30**      **Break**
- 2:45**      **Annual Income (continued)**
- Other Types of Income
- Assets**
- Real Property vs Personal Property
  - Savings and Checking Accounts
  - Jointly Owned Assets
  - Trusts
  - Tax Refunds
  - Retirement Accounts
- 5:00**      **End of Day Three**

**AGENDA**  
*PUBLIC HOUSING SPECIALIST TRAINING*  
**INTAKE, OCCUPANCY AND RENT CALCULATION ESSENTIALS**

**DAY FOUR**

- 8:00**      **Assets** (continued)
- Other Assets
  - Income from Assets
  - Net Family Assets of \$50,000 or Less
  - Net Family Assets Exceeding \$50,000
  - 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
  - Medical 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**

**AGENDA**  
*PUBLIC HOUSING SPECIALIST TRAINING*  
**INTAKE, OCCUPANCY AND RENT CALCULATION ESSENTIALS**

**DAY FIVE**

- 8:00**      **Rent Calculations**
- Total Tenant Payment
  - Tenant Rent
  - Ceiling Rent
  - Flat Rent and Family Choice in Rents
  - 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**