

**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**

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**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**

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**DAY THREE**

- |              |  |
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| <b>8:00</b>  | <b>Terminations</b> <ul style="list-style-type: none"><li>▪ Termination of Lease</li><li>▪ Evictions</li><li>▪ Grievance Process</li></ul>   |
| <b>10:15</b> | <b>Break</b>   |
| <b>10:30</b> | <b>Rent Calculation</b><br><b>Annual Income</b> <ul style="list-style-type: none"><li>▪ Income of Different Household Members</li><li>▪ Calculating Income at Annual, Interim, and New Admission</li></ul> |
| <b>12:00</b> | <b>Lunch (on your own)</b>   |
| <b>1:00</b>  | <b>Annual Income</b> <ul style="list-style-type: none"><li>▪ Income of Students</li><li>▪ Periodic Payments</li></ul>  |
| <b>2:30</b>  | <b>Break</b>   |
| <b>2:45</b>  | <b>Annual Income (continued)</b> <ul style="list-style-type: none"><li>▪ Exclusions</li></ul>  |
| <b>5:00</b>  | <b>End of Day Three</b>  |

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**DAY FOUR**

- 8:00 Assets**
- Inclusions and Exclusions
  - Income from Assets
- 10:15 Break**
- 10:30 Adjusted Income Calculation**
- Dependent Allowance
  - Elderly/Disabled Allowance
  - Child Care Allowance
  - Disability Assistance Expenses
  - Medical Expenses
- 12:00 Lunch (on your own)**
- 1:00 Verification Requirements**
- Rent Calculations**
- Total Tenant Payment
- 2:30 Break**
- 2:45 Rent Calculations (continued)**
- Tenant Rent
  - Ceiling Rent
  - Flat Rent and Family Choice in Rents
  - Proprated Rent
- Rent Calculation Quiz**
- 5:00 End of Day Four**

**DAY FIVE**

- 8:00 Rent Calculation Case Studies**
- 10:15 Break**
- 10:30 Rent Calculation Case Studies (continued)**
- Review for Exam**
- 11:45 End of Rent Calculation Training**
- Certificates of Participation Awarded**
- 12:00 Lunch (on your own)**
- 1:00 Examination**
- 4:00 End of Examination**