

AGENDA
PUBLIC HOUSING SPECIALIST TRAINING WEB 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

- 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**

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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**

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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** **End of Seminar**

Optional Certification Exam Available Online