

UP/HO

Upper Peninsula Housing Organization

HOTMA TRAINING

Presented by Nan McKay & Associates and Housing Data Systems/Kanso Software

EVENT DETAILS

Dates	Wednesday–Thursday, October 21–22, 2026
Location	Terrace Bay Hotel Gladstone, Michigan
Trainers	Nan McKay & Associates and Housing Data System/Kanso Software
Topic	HOTMA Requirements — PIH Programs Update
Seating	Limited — Early registration strongly encouraged
Meals Included	Breakfast and lunch provided both days Dinner is on your own

CONFERENCE AGENDA AT A GLANCE

DAY ONE October 21, 2026	› Molly McKay-Williams - Overview of HOTMA for PIH Programs › Annual Income — New Definitions & Household Members › Earned Income, Self-Employment, Student Income › Types of Assets & Calculating Asset Income › Adjusted Income & Deductions › Breakfast & lunch included Dinner on your own 8:30 AM – 4:30 PM
DAY TWO October 22, 2026	› Verification — Consent Forms & Hierarchy › Streamlined Income Determinations › Conducting Interim Reexams › Household Composition Changes & Effective Dates › Mary Hirsch-Justice - Housing Data Systems/Kanso Software › HOTMA- compliant updates Breakfast & lunch included Dinner on your own 8:30 AM – End of Day (Training ends at Noon; Round Tables to follow)

REGISTRATION FEES

★ **EARLY BIRD** — Postmarked on or before September 11, 2026 (First 25 Registrants)

UP/HO Members / Commissioners / Honorary Members	\$350.00
Non-Members	\$750.00

HOTEL INFORMATION

Terrace Bay Hotel • Gladstone, Michigan

A room block has been reserved for UP/HO conference attendees for
Tuesday October 20th and Wednesday, October 21st

ROOM BLOCK DETAILS

Hotel	Terrace Bay Hotel
Location	Gladstone, Michigan
Room Rates	\$129 – \$149 per night
Block Cutoff	Monday, September 1, 2026 — Rooms not guaranteed after this date
Tax Exempt	Provide tax-exempt documentation when reserving your room

TO RESERVE YOUR ROOM

Email the Terrace Bay Hotel directly:

jen@terracebayhotel.com

Mention you are attending the UP/HO Conference

⚠ **Include your tax-exempt documentation with your reservation request**

⚠ **ROOM BLOCK CUTOFF DATE: September 1, 2026**

Rooms in the block are not guaranteed after this date. Reserve early — availability is limited.

CONFERENCE REGISTRATION

Email your completed registration information to:

Krystal Eliason, Treasurer | L'Anse Housing Commission | grnhill@up.net

You will be billed after your registration is received. Your rate will be confirmed based on registration order with the first 25 registrants receiving the Early Bird discount.

First 25 registrants: Members \$350 | Non-Members \$750

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HOTMA TRAINING — REGISTRATION FORM

October 21–22, 2026 | Terrace Bay Hotel, Gladstone, Michigan

⚠ **LIMITED SEATING — Register Early to Reserve Your Spot**

HOW TO REGISTER

Email your completed registration information to:

Krystal Eliason, Treasurer — L'Anse Housing Commission

grnhill@up.net

You will be billed after your registration is received. Your rate will be confirmed based on registration order — first 25 registrants receive the Early Bird discount.

ATTENDEE INFORMATION

♦ Breakfast and lunch are included both days. Dinner is on your own.

1.	NAME	_____	TITLE	_____
2.	NAME	_____	TITLE	_____
3.	NAME	_____	TITLE	_____

AGENCY _____

EMAIL _____

PHONE _____

REGISTRATION FEES

You will be billed at the applicable rate once your registration is confirmed. First 25 registrants receive the Early Bird rate.

★ EARLY BIRD — First 25 Registrants	
UP/HO Members / Commissioners / Honorary Members	\$350.00
Non-Members	\$750.00
STANDARD REGISTRATION — After First 25 Registrants	
UP/HO Members / Commissioners / Honorary Members	\$750.00
Non-Members	\$750.00

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HOTMA REQUIREMENTS TRAINING — CONFERENCE AGENDA

Terrace Bay Hotel • Gladstone, Michigan • October 21–22, 2026

WEDNESDAY, OCTOBER 21, 2026

7:45 a.m.

Breakfast — included in registration

8:30 a.m. – 10:15 a.m.

Nan McKay & Associates

Overview of HOTMA for PIH Programs

New Definition of Annual Income

Income of Various Household Members

Earned Income, Self-Employment, Student Income

Types of Assets & Calculating Asset Income

Adjusted Income & Deductions

10:15 a.m. – 10:30 a.m.

Break

10:30 a.m. – 12:00 p.m.

Nan McKay & Associates — HOTMA Continued

Earned Income | Seasonal Employment | Self-Employment

Income of Students

Periodic Payments and Nonrecurring Income

12:00 p.m. – 1:00 p.m.

Lunch — included in registration

1:00 p.m. – 2:15 p.m.

Nan McKay & Associates — HOTMA Continued

Other Types of Income

Types of Assets | Real Property vs. Personal Property

Calculating Income from Assets

Assets Disposed of for Less Than Fair Market Value

2:15 p.m. – 2:30 p.m.

Break

2:30 p.m. – 4:30 p.m.

Nan McKay & Associates — HOTMA Continued

Asset Limitation | Ownership of Real Property

Net Family Assets Exceeding HUD-Defined Limit

Adjusted Income | Dependent & Elderly/Disabled Deductions

Health & Medical Care Expenses | Disability Assistance Expenses

Permissive Deductions | Hardship Exemptions

4:30 p.m.

End of Day One

Dinner on your own

THURSDAY, OCTOBER 22, 2026

7:45 a.m.	Breakfast — included in registration
8:30 a.m. – 10:15 a.m.	Nan McKay & Associates — HOTMA Continued <i>Verification Consent Forms</i> <i>Use of Other Programs' Income Determinations</i> <i>Streamlined Income Determinations Verification Hierarchy</i> <i>Calculating Income at Annual Reexam</i>
10:15 a.m. – 10:30 a.m.	Break
10:30 a.m. – 12:00 p.m.	Nan McKay & Associates — HOTMA Continued <i>Conducting Interim Reexams</i> <i>Non-Interim Transactions Changes in Household Composition</i> <i>Interim Decreases Interim Increases Family Reporting</i> <i>Effective Dates Interims and FSS</i>
12:00 p.m. – 1:00 p.m.	Lunch — included in registration
1:00 p.m. – 2:15 p.m.	Mary Hirsch-Justice Housing Data Systems — How HOTMA Changes Affect Your Software <i>Kanso Software (HDSWin and Kanso platforms) is the housing management software used by most public housing authorities. Mary will explain how the HOTMA changes to Sections 102 and 104 — including all related HUD-50058 form changes and IMS/PIC reporting updates — will affect the program and what agencies need to know as they prepare for the January 1, 2027 HUD compliance deadline.</i>
2:15 p.m. – 2:30 p.m.	Break
2:30 p.m. – 4:00 p.m.	Mary Hirsch-Justice — Continued Housing Data Systems Q&A and Agency-Specific Implementation Guidance <i>Kanso Software's target release for full HOTMA-compliant updates is October 1, 2026 — giving agencies a 90-day window to adopt, test, and train prior to required submissions.</i>
4:00 p.m.	End of Conference