

AGENDA
HOUSING CHOICE VOUCHER SPECIALIST
HOTMA PHASE I
INTAKE, OCCUPANCY AND RENT CALCULATION ESSENTIALS

DAY ONE
ELIGIBILITY

- 8:00 **Registration**
- 8:30 **Welcome and Introductions**
- 8:45 **Course Overview/Learning Outcomes**
- Basic Program Information**
- Program Components
 - Rules and References for HCV
 - Learning Activity
 - PHA Administrative Plan
 - Overview of HOTMA
 - Fair Housing, Reasonable Accommodation, VAWA
- Chapter 1 Knowledge Check**
- 10:15 **Break**
- 10:30 **Waiting List Management**
- Initial Applications
 - Form HUD 92006
 - Specials Admissions
- Preferences**
- Full Application Stage**
- Chapter 2 Knowledge Check**
- 12:00 **Lunch (on your own)**

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DAY ONE
ELIGIBILITY (continued)

- 1:00 Evaluating Eligibility**
- Family Type**
- Definition of Family
 - Disabled/Displaced/Elderly Families
 - Child Custody
 - Household vs Family
 - Learning Activity
- Social Security Numbers**
- Restriction on Assistance to Noncitizens**
- Learning Activity
- 2:30 Break**
- 2:45 Income Limits**
- Eligibility of Students
 - Learning Activity
- Denial of Assistance**
- Screening and Eviction Rule
 - Mandatory and Discretionary Denials
 - EIV Reports
 - Consideration of Circumstances
 - Informal Reviews
- Chapter 3 Knowledge Check**
- 5:00 End of Day One**

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DAY TWO
OCCUPANCY

- 8:00** **Voucher Issuance**
- Subsidy Standards
 - Learning Activity
 - General Procedures
 - Extensions
 - Suspensions
- HUD Required Briefings**
- Oral Briefing
 - Briefing Packet
- Family Obligations**
- What the Family Must Do
 - What the Family Must Not Do
 - Learning Activity
- Chapter 4 Knowledge Check**
- Leasing**
- Where the Family Can Lease**
- Initial Steps in the Leasing Process**
- The Owner's Lease
 - Learning Activity
- 10:15** **Break**
- 10:30** **Tenancy Addendum**
- Learning Activity
- Disapproval of Owner**
- Final Steps in Leasing Process**
- HAP Contract**
- Learning Activity
- 12:00** **Lunch (on your own)**

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DAY TWO
OCCUPANCY (continued)

- 1:00 **Rent to Owner**
- Rent Increases
 - Rent Reasonableness
- Chapter 5 Knowledge Check**
- 2:30 **Break**
- 2:45 **Annual Activities**
- Annual Reexaminations
 - Interim Reexaminations
 - Moves
 - Inspections
- Chapter 6 Knowledge Check**
- Terminations**
- Learning Activity
- Informal Hearings**
- Chapter 7 Knowledge Check**
- 5:00 **End of Day Two**

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DAY THREE
OCCUPANCY (continued)

- 8:00** **Portability**
- Overview
 - Limitations and Residency
 - Responsibilities of IHA, RHA and Family
 - Portability Billing
 - Penalties
 - Learning Activity
- Chapter 8 Knowledge Check**

RENT CALCULATION

- Form HUD 50058 Overview**
- 10:15** **Break**
- 10:30** **Annual Income**
- Income of Various Household Members
 - Earned Income
 - Seasonal Income
 - Income of Students
- 12:00** **Lunch (on your own)**
- 1:00** **Annual Income (continued)**
- Periodic Payments
 - Nonrecurring Income
 - Zero Income Families
- 2:30** **Break**
- 2:45** **Income (continued)**
- Imputed Welfare Income
 - Other Types of Income
- 5:00** **End of Day Three**

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DAY FOUR
RENT CALCULATION (continued)

- 8:00** **Assets**
- Type of Assets
 - Savings and Checking Accounts
 - ABLE Accounts
 - Retirement Accounts
 - Jointly Owned Assets
 - Trusts
 - Income from Assets
 - Market Value
 - Cash Value
 - Anticipated Income
 - Assets Disposed of for Less than Fair Market Value
- 10:15** **Break**
- 10:30** **Adjusted Income Calculation**
- Dependent Allowance
 - Elderly/Disabled Allowance
 - Child Care Allowance
 - Disability Assistance Expenses
 - Health and Medical Care Expenses
- 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** **TTP**
- Subsidy and Family Share Calculation**
- Minimum Rent
 - Payment Standard Rent Calculation
 - Maximum Share at Initial Occupancy
 - Prorated Rent
- 5:00** **End of Day Four**

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DAY FIVE
RENT CALCULATION (continued)

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| 8:00 | Rent Calculation Quiz
Case Studies |
| 10:15 | Break |
| 10:30 | Case Studies (continued)
Certificates of Participation Awarded |
| 12:00 | Lunch (on your own) |
| 1:00 | Optional Certification Exam |
| 4:00 | End of Exam |