

**AGENDA**  
*HOUSING CHOICE VOUCHER SPECIALIST*  
**HOTMA**  
**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
  - PHA Administrative Plan
  - Overview of HOTMA
  - Nondiscrimination and Fair Housing Compliance
    - Disability
    - Verification
    - 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 Number Requirements**  
              **Restriction on Assistance to Noncitizens**
- Learning Activity
- 2:30**      **Break**
- 2:45**      **Income Limits**
- Learning Activity
  - 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
    - Voucher Issuance
    - Extensions
    - Suspensions
  - 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 a Family Can Lease**
- Initial Steps in the Leasing Process**
- Request for Tenancy Approval
  - Initial Inspection
  - 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**
- Rent to Owner
  - Rent Increases
  - Rent Reasonableness
- Chapter 5 Knowledge Check**
- Annual Activities**
- Annual Reexaminations
  - Non-Interim Reexam Transactions
- 2:30 Break**
- 2:45 Annual Activities (continued)**
- Interim Reexaminations
    - Interim Decreases
    - Interim Increases
    - Changes in Family Composition
    - Family Reporting
    - Effective Date of Changes
  - Moves with Continued Assistance
  - Periodic Inspections
- Chapter 6 Knowledge Check**
- 5:00 End of Day Two**

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**DAY THREE**  
OCCUPANCY (continued)

- 8:00**      **Terminations**
- Mandatory and Discretionary Terminations
  - Termination of the HAP Contract
- Informal Hearings**
- Chapter 7 Knowledge Check**
- Portability**
- Overview
  - Limitations and Residency
  - Responsibilities of IHA, RHA and Family
  - Portability Billing
  - Penalties
  - Learning Activity
- Chapter 8 Knowledge Check**
- 10:15**      **Break**
- 10:30**      **Rent Calculation**
- Form HUD 50058 Overview**
- Annual Income**
- Income of Various Household Members
  - Earned Income
  - Income of Students
- 12:00**      **Lunch (on your own)**
- 1:00**      **Rent Calculation (continued)**
- Annual Income**
- Periodic Payments
  - Nonrecurring Income
  - Imputed Welfare Income
  - Zero Income Families
- 2:30**      **Break**
- 2:45**      **Income (continued)**
- Other Types of Income
- Assets**
- Real Property vs Personal Property
  - Savings and Checking Accounts
- 5:00**      **End of Day Three**

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**DAY FOUR**

RENT CALCULATION (continued)

- 8:00**      **Assets** (continued)
- Jointly Owned Assets
  - Trusts
  - Tax Refunds
  - Retirement Accounts
  - Other Assets
  - Self-Certification of Assets
  - Income from Assets
  - Assets Disposed of for Less than Fair Market Value
- 10:15**      **Break**
- 10:30**      **Adjusted Income Calculation**
- Dependent Allowance
  - Elderly/Disabled Allowance
  - Childcare Allowance
  - Disability Assistance Expenses
  - Health and Medical Care Expenses
  - Hardship Exemptions
    - Phased-in Relief
    - General Relief
  - 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**  
**RENT CALCULATION (continued)**

- |              |                                                                                                                                                                                                                                                                                                                        |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>8:00</b>  | <b>TTP</b> <ul style="list-style-type: none"><li>▪ Minimum Rent</li></ul> <b>Utility Allowances</b><br><b>Subsidy and Family Share Calculation</b> <ul style="list-style-type: none"><li>▪ Payment Standards</li><li>▪ Rent Calculation</li><li>▪ Maximum Share at Initial Occupancy</li><li>▪ Prorated Rent</li></ul> |
| <b>10:15</b> | <b>Break</b>                                                                                                                                                                                                                                                                                                           |
| <b>10:30</b> | <b>Rent Calculation Quiz</b><br><b>Case Studies</b>                                                                                                                                                                                                                                                                    |
| <b>12:00</b> | <b>Lunch (on your own)</b>                                                                                                                                                                                                                                                                                             |
| <b>1:00</b>  | <b>Optional Certification Exam</b>                                                                                                                                                                                                                                                                                     |
| <b>4:00</b>  | <b>End of Exam</b>                                                                                                                                                                                                                                                                                                     |