

AGENDA
PUBLIC HOUSING SPECIALIST
HOTMA PHASE I
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
- 10:15** **Break**
- 10:30** **Rent Calculation**
Overview of HUD-50058 Form
- 12:00** **Lunch (on your own)**
- 1:00** **Annual Income**
- Income of Various Household Members
 - Earned Income
 - Seasonal Income
- 2:30** **Break**
- 2:45** **Annual Income (continued)**
- Income of Students
 - Periodic Payments
- 5:00** **End of Day Three**

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DAY FOUR

- 8:00** **Annual Income** (continued)
- Nonrecurring Income
 - Imputed Welfare
 - Other Types of Income
- 10:15** **Break**
- 10:30** **Assets**
- Types of Assets
 - Market Value
 - Cash Value
 - Anticipated Income
- 12:00** **Lunch** (on your own)
- 1:00** **Adjusted Income Calculation**
- Dependent Allowance
 - Elderly/Disabled Allowance
 - Child Care Allowance
 - Disability Assistance Expenses
 - Health and Medical Care Expenses
- Verification Requirements**
- 2:30** **Break**
- 2:45** **Rent Calculations**
- Total Tenant Payment
 - Tenant Rent
 - Ceiling Rent
 - Flat Rent and Family Choice in Rents
- 5:00** **End of Day Four**

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DAY FIVE

- 8:00 **Rent Calculation Quiz**
 Rent Calculations (continued)
 - Prorated Rent
- 10:15 **Break**
- 10:30 **Rent Calculation Case Studies**
 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**