

**AGENDA**  
*PUBLIC HOUSING SPECIALIST WEB TRAINING*  
**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**
- 12:00     **End of Seminar**

**Certification Exam Available Online**