



HOTMA PH Income & Rent Calculations

Workshop Agenda | San Antonio, TX | St Anthony Hotel

Dates: August 4 - 6, 2026

Tentative Class Times: 8:30am – 4:30pm (CT) | Lunch: 12:00pm – 1:00pm

All participants will need a pencil and calculator for working case studies throughout the workshop.

DAY 1

- Introduction & HOTMA Compliance Roadmap
 - What is Already Required & What Must be Ready for January 1, 2027
 - Local Policy Decisions
 - Staff, Software, Forms, & File Readiness
- Application Forms & Consent Requirements
 - Application Forms & Family Composition Review
 - Form HUD-9886-A
 - Consent Requirements & Revocation of Consent
- Impact of Data Entry on Form HUD-50058
 - HOTMA-Compliant Reporting Expectations
 - Common HUD-50058 Data Entry Errors
 - Why Accurate Coding Matters for Compliance & Subsidy
- HUD's Verification Hierarchy
 - EIV Requirements
 - Safe Harbor Verification
 - File Documentation Standards
- Annual Income
 - Definition of Annual Income
 - Earned & Unearned Income
 - Day Laborer, Independent Contractor, & Seasonal Worker Definitions
 - Anticipated Income & Practical Calculation Issues
 - Acceptable Forms of Verification for Earned & Unearned Income
 - Determining Timeline of Annual Income During Annual Reexamination

DAY 2

- Assets & Income from Assets
 - Definition of Net Family Assets
 - Excluded Assets
 - Verification & Documentation of Assets
 - Actual Asset Income Versus Imputed Asset Income
 - Passbook Rate & Inflation-Adjusted Thresholds
- Federally Mandated Income Exclusions
 - Updated Income Exclusions
 - Nonrecurring Income
 - Student Financial Assistance
 - Verification & Documentation of Excluded Income

- Processing Over-Income Families
 - Public Housing Over-Income Requirements
 - Notices & Tracking
 - Policy & File Documentation Considerations
- Deductions & Allowances
 - Mandated Deductions & Allowances
 - Hardship Exemptions & Required Documentation
 - Permissible Deductions

DAY 3

- Adjusted Income & Total Tenant Payment
 - Moving from Annual Income to Adjusted Income
 - TTP Calculation Steps
 - Common Calculation Errors
- Minimum Rent & Hardship Exemptions
 - Minimum Rent Requirements
 - Temporary & Long-Term Hardship Exemptions
 - Required Notices, Verification, & File Documentation
- Flat Rent Requirements
 - Annual Flat Rent Activities
 - Family Choice Requirements
 - Flat Rent Hardship Requests
- Utility Allowances & Tenant Rent
 - Applying Utility Allowances in Public Housing
 - Utility Reimbursement Issues
 - Calculating Final Tenant Rent
- Mixed-Family Prorated Rent Calculations
 - Eligible & Ineligible Household Members
 - Proration Steps
- Income Reexaminations Under HOTMA
 - Decreases in Adjusted Income
 - Increases in Adjusted Income
 - Non-Interim Updates & Mid-Cycle Reporting
- Putting It All Together – Final Case Study & Review
- Optional Certification Examination Administered Online