Public Housing & Housing Choice Voucher
HOTMA Compliant Income/Rent Calculations

AGENDA

October 13 - 15 (Tuesday - Thursday)

Class times: 9:00 a.m. – 4:30 p.m. Lunch: 12:00 p.m. – 1:00 p.m.

DAY 1 – HOTMA FOUNDATIONS, FAMILY COMPOSITION, VERIFICATION, AND ANNUAL INCOME

HOTMA Framework and Implementation

- Income-to-rent calculation process
- Path to HOTMA
- HOMTA compliance roadmap
- Federal requirements and deadlines

Family Composition, Eligibility, and Responsibilities

- Family and household member classifications
- Dependents, students, and elderly or disabled families
- Eligibility and rent-calculation impact
- Family disclosures, consent forms, and documentation

New HUD-50058 Reporting and Application

- Purpose and organization of the HOTMA-compliant HUD-50058
- New and revised fields for assets, income, deductions, and hardship relief
- Action types, effective dates, and program-specific reporting sections
- Translating verified information into accurate HUD-50058 data

Verification Requirements

- HOTMA verification hierarchy
- The 9886-A
- EIV, upfront income verification, and third-party documentation
- Discrepancy resolution and file documentation

Determining Annual Income

- HOTMA definition of annual income
- Income types and sources
- Income methodology at admission
- Fluctuating, seasonal, and irregular income

Income Exclusions

- HOTMA definitions and changes
- Federally mandated income exclusions
- Treatment of excluded income
- Verification and documentation of excluded income

DAY 2 – ASSETS, DEDUCTIONS, ADJUSTED INCOME, AND INTERIM REEXAMINATIONS

Net Family Assets and Eligibility

- HOTMA asset definitions – necessary and non-necessary items of personal property
- Asset and real-property limitations
- Eligibility, exceptions, and PHA discretion
- Included and excluded asset types

Calculating Income from Assets

- Asset verification and self-certification
- Cash value and disposed assets
- Actual and imputed asset income
- Passbook rate and total asset-income calculation

Deductions, Allowances, and Hardship Relief

- Dependent and elderly or disabled family deductions
- Health, medical, and disability-assistance expenses
- Child-care expenses and PHA permissive deductions
- Medical-expense phase-in and medical and child-care hardship relief

Adjusted Income and Total Tenant Payment

- Calculating adjusted annual and monthly income
- Percentage-of-income calculations
- Minimum-rent requirements
- Minimum-rent hardship exemptions

Annual Reexaminations

- Prior 12-month income review
- Adjustments for current changes
- Review of family composition, assets, and deductions
- Effective dates, notices, and HUD-50058 reporting

Interim Reexaminations

- Family reporting responsibilities
- Required and discretionary interim changes
- Income and adjusted-income thresholds
- Effective dates, corrections, and de minimis errors

DAY 3 – PROGRAM-SPECIFIC RENT CALCULATIONS AND APPLICATION

Public Housing Over-Income Families

- Identification and tracking requirements
- Required notices and applicable grace periods
- Continued occupancy and alternative rent
- Termination, reporting, and documentation requirements

Public Housing Income-Based and Flat Rent

- Total Tenant Payment, tenant rent, and minimum rent
- Utility allowances and utility reimbursements
- Flat rent requirements and processes
- Annual family choice of rent

HCV Rent Determination and Subsidy Calculation

- Contract rent, gross rent, and rent reasonableness
- Payment standards, exception payment standards, and utility allowances
- Total Tenant Payment, family share, and tenant rent to owner
- Housing Assistance Payment and utility reimbursement

HCV Rent and Subsidy Changes

- Maximum family share at initial occupancy
- Changes in payment standards
- Changes in utility allowances
- Effective dates and recalculation requirements

Mixed-Family Prorated Rent and Assistance

- Identifying mixed families and eligible family members
- Public Housing prorated rent
- HCV prorated assistance
- Calculation and documentation requirements

Rent Calculation Parking Lot and Review

- Participant-driven discussion of challenging HOTMA concepts
- Revisit parked topics, calculations, and policy decisions
- Clarify remaining PH and HCV rent-calculation issues
- Reinforce key processes before comprehensive case studies

Comprehensive Program-Specific Case Studies

- Complete Public Housing rent calculation
- Complete HCV subsidy calculation
- Mixed-family prorated-assistance calculation
- Documentation, effective dates, and error correction