

AGENDA
NMA HOTMA SUMMIT

DAY ONE

- 8:00 Registration
- 8:30 Welcome and Introductions
- 8:45 Overview of HOTMA for PIH Programs
- History of HOTMA
 - Effected Programs
 - Implementation Timelines
 - HOTMA Resources
- 10:00 Break
- 10:20 Calculating Income
- New Definition of Annual Income
 - Using Outside Determinations of Income
 - Projecting Income for New Admissions and Interims Reexams
 - Using Past Income for Annual Reexams
 - Learning Activity: Calculating Income
- 12:00 Lunch

AGENDA
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DAY ONE (continued)

- 1:00** **Review of Changes to Income under HOTMA**
- Student Financial Assistance
 - Learning Activity: Calculating Student Financial Assistance
 - Earned Income
 - Earned Income Disallowance
 - Nonrecurring Income
 - Certain Disability Payments
 - Training Program Income
- 2:30** **Break**
- 2:45** **Assets**
- When Net Cash Value is \$50,000 or Less
 - When Net Cash Value is Over \$50,000
 - Asset Limitation
 - Real Property Ownership Limitation
 - Necessary Items of Personal Property
 - Trusts
 - Retirement Accounts
 - Learning Activity: Assets
- 5:00** **End of Day One**

AGENDA
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DAY TWO

- 8:00 **Calculating Adjusted Income**
- Dependent Allowance
 - Health and Medical Care Expenses/Disability Assistance Expenses
 - Hardship Exemptions
 - Learning Activity: Adjusted Income
- 10:10 **Break**
- 10:30 **Interims**
- Mandatory Interims
 - Discretionary Interims
 - Effective Dates
 - Learning Activity: Interims
- Other Changes**
- HUD Form 9886
 - Enterprise Income Verification (EIV)
 - De Minimis Errors
- Q & A Session**
- 11:45 **Certificates of Participation Awarded**
- 12:00 **End of Session / *Lunch***