



# **Tenmast WinTen2+**

Version 4.34.2

Enabling HOTMA on the Project Policy screen

May 2025

## Background

Tenmast WinTen2+'s **Project Policy** setup screen has been enhanced to support calculation changes published in HUD's Final Rule "Housing Opportunity Through Modernization Act of 2016: Implementation of Sections 102, 103, and 104."

On the **Project Policy** setup screen, users can now enable HOTMA compliant calculations by program type in their agency's database and easily update inflationary adjustment values.

## Enabling HOTMA-Compliant Calculations

### Which users can change the HOTMA effective date?

Users with security access to the **Project Policy** setup screen can set, change, or clear the HOTMA effective date for any program type that supports HOTMA calculations in WT2+.

An **audit log** has been added to capture changes to the HOTMA effective date. Hover your mouse over the "Set HOTMA Effective Date" button to view the audit log.

The screenshot shows the WinTen2+ Project Policy Setup screen. The 'Program Type' is set to 'Tax Credit' and the 'Project' is '1/1/0001'. The 'Schedules' section shows 'Add Policy' and 'Begin Date' as '1/1/0001'. The 'Policy Details' section is expanded, showing 'FSS' and 'Annual Inflationary Adjustments and Passbook Rate'. The 'Program Type HOTMA Effective Date' is set to '7/1/2025'. The 'Set HOTMA Effective Date' button is highlighted, and a tooltip displays the audit log for the effective date change.

Field	Value
Elderly Disability Allowance	\$650.00
Dependent Allowance	\$510.00
Passbook Rate	0.45 %
Imputed Asset Limit	51200
Asset Limitation	0.00
Full-Time Student Income Exclusion	480.00
Adoption Assistance Payments Income Exclusion	480.00

Medical/Disability Threshold (MTW) 0.0300 0.03

Minimum Rent \$50.00 Default Minimum Rent

**Default Elderly Disability** Audit for HOTMA Effective Date

**Default Dependent Allow** Changed on 5/1/2025 from 7/1/2025 to 3/1/2025 by

**Default Passbook Rate** Changed on 5/1/2025 from 3/1/2025 to 5/1/2025 by

**Default URP Threshold At** Changed on 5/2/2025 from 5/1/2025 to 7/1/2025 by

**Default Asset Limitation** Changed on 5/5/2025 from 7/1/2025 to 8/1/2025 by

**Default Full-Time Studen** Changed on 5/6/2025 from 8/1/2025 to 7/1/2025 by

**Default Adoption Assista** Changed on 5/7/2025 from 7/1/2025 to [NULL] by

Changed on 5/8/2025 from [NULL] to 7/1/2025 by

## Enabling HOTMA-compliant calculations for a program type

On **Project Policy** setup, enable HOTMA-compliant calculations for a program type by clicking the “Set HOTMA Effective Date” button.

***Note:** While the “Program Type HOTMA Effective Date” field is available on all policy screens, WT2+ doesn’t support setting different HOTMA effective dates for projects within a program type.*

Clicking the “Set HOTMA Effective Date” button will open a prompt for the user to change the effective date. Key in the “HOTMA Effective Date” (certification effective date) and click **OK**.

*If a HOTMA Effective Date was set in error, a user can clear the date by leaving the “Enter HOTMA Effective Date” blank on the HOTMA Effective Date prompt and click **OK**.*

On the **Project Policy** setup screen’s top toolbar, click **Save** to lock in your change.

Policy Details FSS

### Annual Inflationary Adjustments and Passbook Rate

The Housing Opportunity Through Modernization Act (HOTMA) Final Rule requires the following amounts to be adjusted on an annual basis. These amounts can be different for Moving to Work agencies.

Program Type HOTMA Effective Date 7/1/2025 Set HOTMA Effective Date

Elderly Disability Allowance	\$6
Dependent Allowance	\$5
Passbook Rate	0.1
Imputed Asset Limit	52
Asset Limitation	0.1
Full-Time Student Income Exclusion	48
Adoption Assistance Payments Income Exclusion	48

Medical/Disability Threshold (MTW) 0.0500

#### HOTMA Effective Date

WARNING: Setting the HOTMA Effective Date will enable certifications for this program type to use the HOTMA Sections 102 and 104 income and assets calculations.

**Audit Log:**  
Changed on 5/1/2025 from 7/1/2025 to 3/1/2025 by [redacted]  
Changed on 5/1/2025 from 3/1/2025 to 5/1/2025 by [redacted]  
Changed on 5/2/2025 from 5/1/2025 to 7/1/2025 by [redacted]

Enter HOTMA Effective Date: [text box]

Cancel OK

## Considerations for enabling HOTMA

- In WT2+, HOTMA can only be enabled for program types that actively support the collection and submission of HOTMA-compliant certification calculations.
  - If a program type doesn't (yet) support HOTMA, users will not be able to enable HOTMA in the database for that program type.

The screenshot shows the 'Project Policy' setup for 'Housing Choice Voucher'. The 'Schedules' section has a 'Begin Date' of 6/3/2019. The 'Policy Details' tab is selected, showing 'FSS' (Family Support Services). A section titled 'Annual Inflationary Adjustments and Passbook Rate' explains that the Housing Opportunity Through Modernization Act (HOTMA) Final Rule requires annual adjustments. Below this, there are fields for 'Program Type HOTMA Effective Date' and a 'Set HOTMA Effective Date' button. A table lists various allowances and exclusions with their default values. A tooltip message states: 'HOTMA not Supported for Program Type. HOTMA calculations are not currently available for this program type. WT2+ currently supports HOTMA calculations for the following program types: Rural Development, Tax Credit'.

Program Type HOTMA Effective Date	Set HOTMA Effective Date
Elderly Disability Allowance	Default Elderly Disability Allowance
Dependent Allowance	Default Dependent Allowance
Passbook Rate	Default Passbook Rate
Imputed Asset Limit	Default URP Threshold Amount
Asset Limitation 0.00	Default Asset Limitation
Full-Time Student Income Exclusion 0.00	Default Full-Time Student Income Exclusion
Adoption Assistance Payments Income Exclusion 0.00	Default Adoption Assistance Payments Income Exclusion

- When Project Policy setup is changed to enable HOTMA, please advise any users that are currently logged into WT2+ to log out and log back in to see the changes.
- Certifications that were *finalized* prior to enabling HOTMA will not be changed by the system when the HOTMA effective date is set.
  - Finalized certifications that should use HOTMA-compliant calculations will need to be reviewed, and either re-opened or voided to correct the certification data.
- *In process* certifications that have an effective date equal to or greater than the HOTMA effective date will reflect the HOTMA-compliant calculations.
- Certifications finalized with an effective date less than the "HOTMA effective date" will use pre-HOTMA certification calculations.

# Inflationary Adjustments

The **Project Policy** setup screen now groups inflationary adjustment fields together at the top of the policy record so they can be more easily updated by your agency when the new amounts are published on [HUD's website](#).

The screenshot displays the WinTen2+ Project Policy Setup interface. At the top, the 'Program Type' is set to 'Tax Credit' and the 'Project' field is highlighted. Below this, the 'Schedules' section includes an 'Add Policy' button and a table with 'Begin Date' (1/1/0001) and 'End Date' (blank). The 'Policy Details' tab is active, showing the 'FSS' section. A heading 'Annual Inflationary Adjustments and Passbook Rate' is followed by a note about the Housing Opportunity Through Modernization Act (HOTMA). Below this, a table lists various adjustment fields with their current values and default values.

Field	Value	Default
Program Type HOTMA Effective Date	7/1/2025	Set HOTMA Effective Date
Elderly Disability Allowance	\$650.00	Default Elderly Disability Allowance
Dependent Allowance	\$510.00	Default Dependent Allowance
Passbook Rate	0.45 %	Default Passbook Rate
Imputed Asset Limit	\$1200	Default URP Threshold Amount
Asset Limitation	0.00	Default Asset Limitation
Full-Time Student Income Exclusion	480.00	Default Full-Time Student Income Exclusion
Adoption Assistance Payments Income Exclusion	480.00	Default Adoption Assistance Payments Income Exclusion
Medical/Disability Threshold (MTW)	0.0300	0.03
Minimum Rent	\$50.00	Default Minimum Rent