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RENTCafé® Affordable Housing

Leading Practice Workflow—Annual Recertification

The focus of this RENTCafé Affordable Housing session is to review move-in leading practice workflows from the role of a RENTCafé Site Manager user who requires no further approval. Attendees may ask questions throughout the session and will be provided opportunities to practice in RENTCafé Affordable Housing.

Introduction

Affordable housing providers can now replace paper-based applications and compliances processes with online portals for applicants and residents through RENTCafé Affordable Housing. RENTCafé Affordable Housing extends the benefits and features of the Yardi RENTCafé suite to properties receiving federal or state housing assistance through standard workflows and verifications that provide compliance for programs including HUD 50059, Section 42 Low Income Tax Credit, HOME, and Rural Development.

In this Session

During our demonstration, we will explore how RENTCafé Affordable can:

- Reduce errors and expedite processing of compliance files.
- Electronically manage paperwork.
- Heighten communication among team members, applicants, and residents.
- Assign tasks to team members based on file status.
- Provide a central location for all information related to applications and certifications.
- Offer online completion of leases and certifications for your prospects and residents.

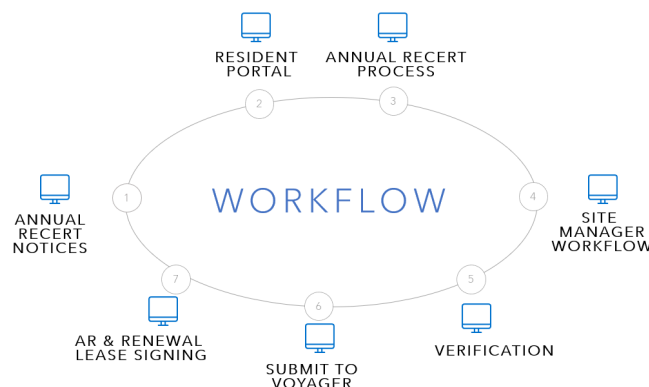
To begin, let's look at a high-level overview of the move-in leading practice workflow.

Workflow

With RENT Café Site Manager, you can create and send annual recertification notices online. If residents receive a recertification notice though email, the residents are provided a link directly to their portal.

- The resident completes the online recertification process.
- When the resident submits the recertification application, the site manager receives an alert. The site manager can review compliance details conveniently from the site manager's computer.
- The site manager:
 - Creates verifications in Site Manager and sends them to the resident's portal for release.
 - Sends submissions to Voyager, where the entire certification is created for them.
 - Sends certifications and lease renewals for resident signatures.

The following graphic shows a high-level overview of the annual recertification and lease renewal workflow.



Site Manager Introduction

- **Compliance Dashboard**
Site Manager saves filters based on last search by the same user. Use these filters to limit the records that appear. You can also search by secondary status.
- **Custom Dashboard**
Each role has different tiles assigned, based on the role responsibilities and the information the users need to access. (Refresh regularly if logged on.)
- **Household Page**
This page is the primary location for managing records and performing all actions. The **Member** tab initially appears.
- **More Menu**
Use this menu to view payments, review screening, and assign units.
- **Side Menu**
The side menu may change depending on your assigned access level. Today, we will focus on Recertification Notices.

Annual Recertification Notices

You can generate recertification notices for your residents from Site Manager.

From the side menu, click **Compliance Management** and then click **Recertification Letters**. The **Certifications** tab will show all recertifications that are due for residents. (Residents must have email addresses in Voyager to appear).

NOTE: If a resident due for annual recertification does not have an email address recorded in Voyager, an **Errors** tab appears next to the **Certifications** tab. The site manager can print only the recertification notice for those residents.

The screenshot displays the RENTCafé Site Manager interface. The left sidebar shows the navigation menu with 'Compliance Management' and 'Recertification Letters' highlighted. The main content area is titled 'Recertification Letters' and includes a 'New Processing History' section with dropdowns for 'Property' (Grayson Gardens) and 'Notice Type' (All). Below this is a 'Certifications' section with buttons for 'Uncheck All', 'Send Emails', 'Print Letters', 'Email & Print', and 'Create As Background Task'. A table lists the certification details:

Include	Building Id	Notice	Unit	Tenant Code	Tenant Name	Program	Contract No.	Next AR	Notice Due	Notice Sent Date	Phone No.	Email
<input checked="" type="checkbox"/>	grayson (Grayson Gardens TC Mkt)	Final Notice	501	10009597	Tucker Mack	TacCredit		12/01/2020	10/02/2020	08/31/2020		tuckmack@rpmnet.com

Showing 1 to 1 of 1 entries

The user can send the notice as an email, print the notice, or both.

When you have sent the recertification notice, the resident will receive an email with a link directly to the resident's portal so that the resident can complete the annual recertification application.

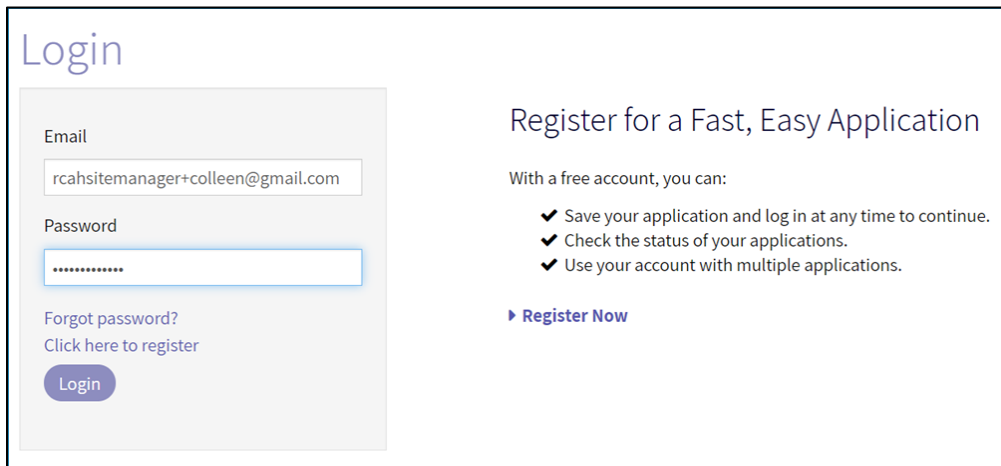
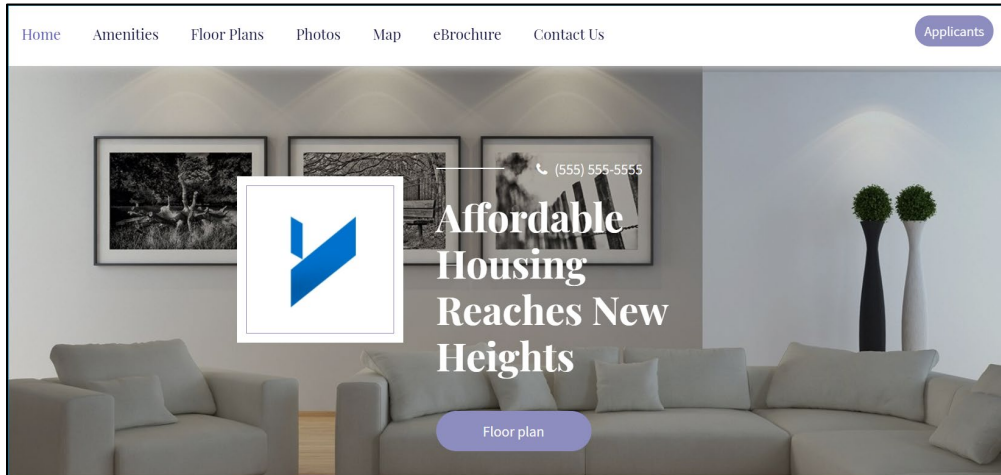
Resident Portal Login/Registration Overview

Resident Log-on

A prospect must register to begin the application process.

If a resident has not yet used the portal, the resident will need to register to be able to begin the recertification application process. After registering, the resident can log on and off the site as needed. When a resident logs off, RENTCafé saves the resident's completed information. When the resident logs on, RENTCafé displays the step from which the resident logged off.

If a resident has registered, the log-on screen appears.



Registration Process

Current residents will be validated through the first and last name and email address recorded on the **Resident** screen in Voyager. You can set up additional validations for phone, resident code, and apartment number.

When registering, residents will be asked whether they have a registration code. The registration code is the resident code (“t-code”) in Voyager.

Create an Account

Don't have an account yet?

Create your account today, and Apply Online!

- Submit your application
- Check out the status of your application
- Get ready to move in!

Already have an account? Login Now!

Email

Password

[Forgot password?](#)

Create an Account

Please contact the leasing office if you don't know your registration code.

Enter Your Registration Code

Don't have an account yet?

Create your account today, and Apply Online!

- Submit your application
- Check out the status of your application
- Get ready to move in!

Personal Details

First Name*

Last Name*

Phone (Home)*

Account Information

Email Address* (Your email address is your user name)

Password*

Confirm Password*

This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.

I have read and accept the Terms and Conditions

Resident Portal–Annual Recertification Process

From the resident portal, the resident will display the **Compliance** tab. If the resident is due for a recertification in the next 120 days, a message appears allowing the resident to begin completing the certification.

Language Selection

The resident’s first step is to select a preferred language. You as the administrator can decide which languages will be available for each property. Allowing a resident to complete the certification in the resident’s preferred language will make the recertification process easier and may reduce the amount of help they need from your staff.

Recertification Progress 0%

My Recertification...

* Denotes a required field

Please select your preferred language

Translated application questions are optional. This service is provided solely for your convenience, and is not intended to replace a professional translator.

Preferred Language*

- English
- Español (Spanish)
- 日本人 (Japanese)

Next

Household Members

The **Household Members** step is automatically completed with members from the resident’s previous certification. Residents need click the **More Info Needed** button and update each member’s information.

Recertification Progress 1%

My Recertification...

* Denotes a required field

Household Members

For each existing household member, please complete the required information by clicking More Info Needed.
If any of the following household members has vacated, please remove their record by clicking the Delete button next to their name.
For anyone who is expected to move into this household at the time of recertification, click Add Household Member.

Add Household Member

First Name	Last Name	Date of Birth	Edit	Delete
Parker	Lane	6/4/1981	More Info Needed	Delete
Cindy	Lane	3/4/1979	More Info Needed	Delete

Showing 1 to 2 of 2 entries

Back Next

Member Student Status

Depending on the housing programs for which the household is recertifying, student status steps require information regarding specific members or the household as whole.

For a tax credit certification, each member must provide information regarding the member’s current student status. Examples of the questions asked are student status, type of education, and the name of the student’s educational institution.

My Recertification... Recertification Progress 3%

* Denotes a required field

Member Student Status

This property participates in one or more housing programs that require additional information to be gathered regarding the student statuses of household members.
For each of the members listed below, please click **Edit** and answer the questions as they pertain to that member.

Member Name	Status	Edit
Parker Lane	Incomplete	Edit
Cindy Lane	Incomplete	Edit

Showing 1 to 2 of 2 entries

[Back](#) [Next](#)

Student Status

What is this person's student status?*

Part-Time Student

Is this person a student at an Institution of Higher Education as defined under Section 102 of the Higher Education Act of 1965 (20 U.S.C. 1001 and 1002)?*

Yes

Where is this person currently enrolled as a student?*

Georgia State University

Was this person an orphan or ward of the court through the age of 18?*

No

Does this person have legal dependents other than a spouse (such as an elderly dependent parent)?*

No

Is this person a graduate or professional student?*

Yes

Household Student Status

For a tax credit property with student household members, the resident must select one of the following statements about student status.

My
Recertification Progress 4%

Recertification...
* Denotes a required field

- Language Selection
- Household Members
- Member Student Status
- Household Student Status
- Live-In Aide
- Anticipated Household Additions
- Income
- Assets
- Final Review & Submission

Household Student Status

This property participates in the Low-Income Housing Tax Credit (LIHTC) program, which requires additional information to be collected regarding the student statuses of households. In accordance with this program's guidelines, a full-time student is defined as an individual of any age who:

- Currently attends, has attended, or will attend school (including K-12) for five (5) months or more during the current and /or upcoming calendar year at a regular educational institution.

AND

- Is/Was/Will be considered a full-time student by the educational institution. *(Note: The criteria used to define a full-time student may vary across institutions.)*

Please select the statement below that is true regarding your household's student status: *

- Household consists of all members who have been/will be FULL-TIME students for five months or more out of the current and/or upcoming calendar year (months need not be consecutive).
- Household contains all students, but is qualified because the following occupant is a PART-TIME student who is not/will not be a full-time student for five months or more of the current and/or upcoming calendar year.
- Household contains at least one occupant who is not a student and has not been/will not be a student for five months or more out of the current and/or upcoming calendar year (months need not be consecutive).

Back
Next

Live-In Aide

If the resident's household includes a live-in aide, the resident completes this step.

My
Recertification Progress 0%

Recertification...
* Denotes a required field

- Language Selection
- Household Members
- Member Student Status
- Household Student Status
- Live-In Aide
- Anticipated Household Additions
- Income
- Assets
- Final Review & Submission

Live-In Aide

To qualify as a live-in aide, the following criteria must be met:

- The live-in aide is determined to be essential to the care and well-being of one or more elderly, near-elderly, or disabled household members.
- The live-in aide is not obligated for the support of one or more elderly, near-elderly, or disabled household members.
- The live-in aide would not be living in the unit except to provide the necessary supportive services to one or more elderly, near-elderly, or disabled household members.

Add Live-In Aide

No Live-In Aides Added

Back
Next

Anticipated Household Additions

The resident adds anticipated household members expected over the next 12 months, including unborn children.

My Recertification... Recertification Progress 7%

* Denotes a required field

Please tell us about anyone who is expected to move into the household in the next 12 months

Please click **Add Anticipated Household Addition** and enter information for each person who is expected to move into the household in the next 12 months, including unborn children.

Add Anticipated Household Addition

No Anticipated Household Additions Added

[Back](#) [Next](#)

Income

On this step, the resident answers questions about household income. The resident selects **Yes** or **No** for each question. The answers determine additional questions that appear.

My Recertification... Recertification Progress 8%

* Denotes a required field

Next we will gather information about your household's income.

Please provide all sources of income that the household is currently receiving or expects to be receiving over the next 12 months.

Do you or any member of your household have the following :

Employment Wages or Salaries? *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Regular Pay for a Member of the Military? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Self-Employment Income? *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Unemployment Benefits or Severance Pay? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Insurance Settlements/Workers' Compensation? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Social Security Income (Social Security Benefits or SSDI) *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Supplemental Security Income (SSI)? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Disability Benefits Excluding Social Security Disability Insurance (SSDI)? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Public Assistance (excluding food stamps and medical assistance)? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Child Support (answer yes if you have a court order or informal agreement, even if you are receiving less than the full amount awarded)? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Alimony/Spousal Maintenance? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Regular Cash and Non-Cash Contributions, Assistance with Paying Bills, or Gifts from Individuals not Living in the Unit (not including groceries)? *	<input type="radio"/> Yes <input checked="" type="radio"/> No

My Recertification... Recertification Progress 10%

* Denotes a required field

Please tell us about any employment wages or salaries

Include all income from employment. Please also include tips, overtime, bonuses, commissions, cash payments, and seasonal employment.

Add Employment

No Employment Added

[Back](#) [Next](#)

Non-Employment

Each member age 18 or over who claims zero income must provide non-employment information.

My Recertification... Recertification Progress 38%

* Denotes a required field

Non-Employment

This step is to be completed by each household member who is 18 years of age or older and claiming no employment income.

Member Name	
Cindy Lane	More Info Needed

Showing 1 to 1 of 1 entries

[Back](#) [Next](#)

- Language Selection
- Household Members
- Member Student Status
- Household Student Status
- Live-In Aide
- Anticipated Household Additions
- Income
- Employment
- Self-Employment
- Non-Employment**
- Zero Income
- Assets
- Final Review & Submission

Is this person currently unemployed?*

Yes

Please select the statement that is true:*

- This person is currently receiving unemployment benefits or other benefits related to their non-employed status.
- This person is not currently receiving and is not expecting to receive unemployment benefits or other benefits related to their non-employed status.
- This person is not currently receiving, but expects to begin receiving unemployment benefits or other benefits related to their non-employed status.

Is this person expecting to become employed in the next 12 months? (If no, select each statement below that applies to this person)*

No

Zero Income

A household member age 18 or over who claims zero income must provide information about how rent and expenses will be paid while the member is living in the apartment.

Recertification Progress 39%

My Recertification... * Denotes a required field

Zero Income

Every adult household member who claims zero income must complete this step. Each member must provide information on how rent and other necessities will be paid for while residing in the unit.

Member Name	
Cindy Lane	More Info Needed

Showing 1 to 1 of 1 entries

Back Next

Assets

On this step, the prospect answers questions about household assets. The prospect selects Yes or No for each question. The answers determine additional questions that appear.

Recertification Progress 40%

My Recertification... * Denotes a required field

Next, we will need to gather information about your household's assets.

Do you or any member of your household have the following :

Checking Accounts? *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Savings Accounts? *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Cash Cards (including government benefits cards)? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Stocks? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Bonds? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Money Market/Mutual Funds? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Certificates of Deposit? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Trust? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Lump Sum Receipts (ie. inheritance, insurance settlement, lottery winnings, capital gains)? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
401(k) or 403(b) Accounts? *	<input type="radio"/> Yes <input checked="" type="radio"/> No

Members enter the details about each asset with a **Yes** answer. An additional step appears on the side menu.

My Recertification... Recertification Progress 42%

* Denotes a required field

Please tell us about any checking accounts

Include all checking accounts for everyone in the household.

Add Checking Account

No Checking Accounts Added

Back Next

Childcare Expenses

On this step, the resident answers a question about childcare expenses paid to an outside source so that an adult family member can work, seek employment, or attend school. If the household selects Yes, an additional step appears requiring details about the childcare expense.

Application Progress 76% Applications & Certifications | Hi, Colleen

* Denotes a required field

Next, we will need to gather information about your household's child care expenses.

Do you or any member of your household have the following :

Expenses paid for child care to enable any adult household member to be employed, seek employment, or go to school? * Yes No

Back Next

Application Progress 78% Applications & Certifications | Hi, Colleen

* Denotes a required field

Please tell us about child care expenses

Include any out-of-pocket expenses from child care which enable an adult household member to work, seek employment, or go to school.

Add Child Care Expense

No Child Care Expenses Added

Back Next

Expenses

If the household is recertifying for 50059, Rural Development, or HOME assistance, questions about expenses appear. To be eligible for expenses, the household head, spouse, or co-head must be elderly (age 62 or older) or disabled.

NOTE: Residents in properties with only tax credit assistance will not be asked about expenses.

Disability Assistance Expenses

On this step, the resident answers questions about disability expenses. The household head, spouse, or do-head must be disabled and pay disability expenses to be able to work.

The resident selects **Yes** or **No** for each question. If the resident selects **Yes**, an additional step appears requiring details about the disability expense.

The screenshot shows a web application interface. At the top, there is a progress bar labeled 'Application Progress' at 79%. The user is identified as 'Hi, Colleen'. A note states '* Denotes a required field'. The main heading reads: 'Next, we will need to gather information about your household's disability assistance expenses.' Below this, the question is: 'Do you or any member of your household have the following :'. Two questions are listed with radio button options:

- 'Expenses paid for attendant care for a disabled household member that enable an adult household member to work? *' with 'No' selected.
- 'Expenses paid for the cost of an auxiliary apparatus or assistance animal for a disabled household member, including costs for maintenance and upkeep? *' with 'Yes' selected.

 At the bottom, there are 'Back' and 'Next' buttons.

The screenshot shows a form titled 'Tell Us About Auxiliary Apparatus/Assistance Animals'. It contains the following fields:

- 'Expense Details' (tabbed section)
- 'Who incurs this expense?*' with a dropdown menu showing 'Richard Smith'.
- 'How much is each expense payment?*' with a text input field containing '\$100.00'.
- 'What is the description of this expense?*' with a text input field containing 'Assistance Animal'.
- 'Is this expected to be an ongoing expense?*' with a dropdown menu showing 'Yes'.
- 'How often does this person pay for this expense?*' with a dropdown menu showing 'Monthly'.

Medical Expenses

On this step, the resident answers questions about medical expenses. The household head, spouse, or co-head must be disabled or elderly (over 62 years of age).

The resident selects **Yes** or **No** for each question. If the resident selects **Yes**, an additional step appears requiring details about the medical expense.

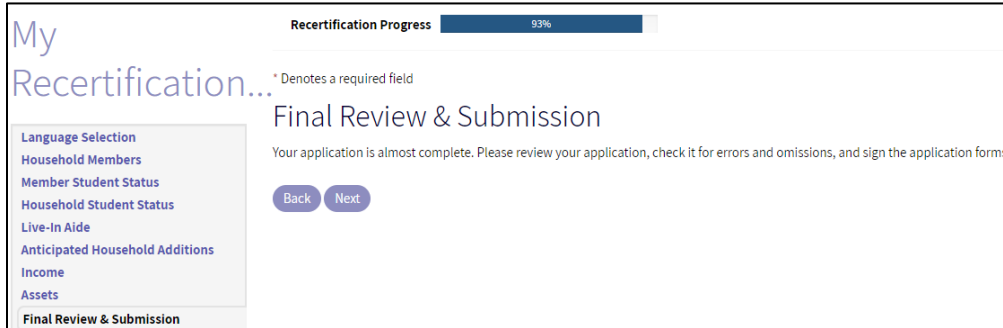
The screenshot shows a web application interface for a medical expenses questionnaire. At the top, there is a progress bar labeled 'Application Progress' at 83% and a user profile 'Applications & Certifications | Hi, Colleen'. A note states '* Denotes a required field'. The main heading is 'Next, we will need to gather information about your household's medical expenses.' Below this, a sub-heading reads 'Households in which the head of household, spouse, or co-head are disabled or are at least 62 years old qualify for deductions based on out-of-pocket expenses.' The primary question is 'Do you or any member of your household have the following :'. A list of seven questions follows, each with radio button options for 'Yes' and 'No':

- Expenses from Medicare premiums? * (No selected)
- Expenses from other medical insurance premiums? * (No selected)
- Expenses from medical assistance through a public assistance agency? * (Yes selected)
- Expenses incurred from ongoing visits to a dentist or doctor's office? * (Yes selected)
- Expenses from prescription medications? * (Yes selected)
- Expenses from over-the-counter medication prescribed by a healthcare professional? * (No selected)
- Outstanding medical bills for which you or a member of your household are currently paying? * (Yes selected)
- Additional out-of-pocket medical expenses? * (No selected)

The screenshot shows a web application interface for adding medical assistance details. At the top, there is a progress bar labeled 'Application Progress' at 86% and a user profile 'Applications & Certifications | Hi, Colleen'. A note states '* Denotes a required field'. The main heading is 'Please tell us about any expenses from medical assistance through a public assistance agency'. Below this, a sub-heading reads 'Include any out-of-pocket expenses from Medical Assistance (MA)'. There is a button labeled 'Add Medical Assistance'. Below the button, a message states 'No Medical Assistance Added'. At the bottom, there are 'Back' and 'Next' buttons.

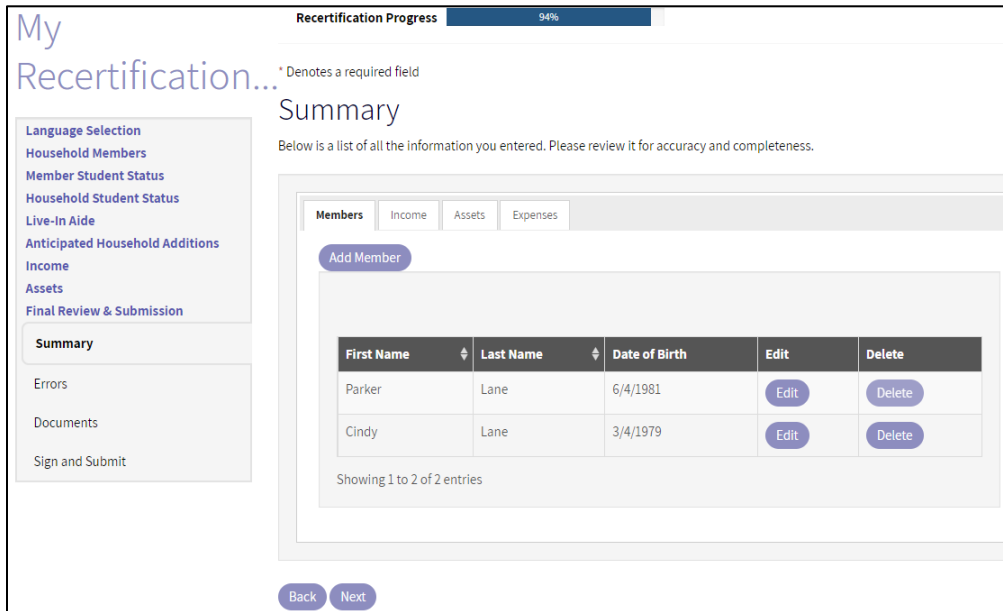
Final Review and Submission

This step prepares the prospect for reviewing all items in the household’s application.



Summary

On the **Summary** screen, the household can make any final changes to the application.



Errors

To help identify errors, RENTCafé Affordable Housing compares how the resident answered the questions to the details the resident provided.

If the resident missed details needed on a previous step, the resident must either provide them or change the answer before the resident can move forward.

Once all errors are resolved, the resident can move forward.

Recertification Progress 96%

* Denotes a required field

Errors

To ensure that we have captured all the information needed to qualify this household for the housing program(s) at this property, please review and resolve the items below.

Error	Corrective Actions
Household has no children. Confirm that this is correct, or add a child member.	<input type="button" value="Add"/> <input type="button" value="Confirm"/>
Please confirm that all assets have been entered for all household members. If you need to add a new asset please navigate back to the assets section and add the missing asset(s).	<input type="button" value="Confirm"/>
Please confirm that all household members have been added. If you need to add a new member please navigate back to the members section and add the missing member(s).	<input type="button" value="Confirm"/>
Please confirm that all incomes have been entered for all household members. If you need to add a new income please navigate back to the incomes section and add the missing income(s).	<input type="button" value="Confirm"/>

Back Next

Documents

On this step, residents can upload requirements.

You can list the required documents to alert households about the documents they need to attach. Residents may use a scanner, tablet, or phone to upload documents.

Recertification Progress 97%

* Denotes a required field

Documents

Based on the answers provided, here is a PRELIMINARY checklist of items we will need to obtain during the application review process. Depending on the review, you may be asked to provide additional verifications by the community, prior to approval.

Learn More	Document	Upload	Scan	View	Delete	Uploaded Date
	Cindy Lane - Cindy's Candles - Scan Financial Statement(s) of the business (audited or unaudited) including an accountant's calculation of straightline depreciation expense if accelerated depreciation was used on the tax return or financial statement.	<input type="button" value="Upload"/>	<input type="button" value="Scan"/>			
	Cindy Lane - Cindy's Candles - Scan form 1040 with Schedule C, E, or F	<input type="button" value="Upload"/>	<input type="button" value="Scan"/>			
	Parker Lane - Target - Scan 4-6 consecutive pay stubs	<input type="button" value="Upload"/>	<input type="button" value="Scan"/>			
	Optional - Scan other household documents.	<input type="button" value="Upload"/>	<input type="button" value="Scan"/>			
	Parker Lane - Bank Account - Savings Account - Upload a copy of the most current account statement from the financial institution.	<input type="button" value="Upload"/>	<input type="button" value="Scan"/>			
	Parker Lane - Bank Account - Checking Account - Scan last 6 months of statements.	<input type="button" value="Upload"/>	<input type="button" value="Scan"/>			

Showing 1 to 6 of 6 entries

Back Next

Sign and Submit

Signing the recertification application is the resident’s final step.

In the following example, the household is using electronic signatures. If you offer electronic signatures, the member selects a signature font. RENTCafé Affordable Housing show the member where the member needs to sign, initial, and date the recertification.

You can allow the household head to invite the other adult household members to sign documents. This option ensures that each adult household member signs that member’s own set of documents.

Site Manager Workflow

Compliance Management Dashboard

Like the **Community Manager Dashboard** in Voyager, the **Compliance Management** dashboard provides the Site Manager user with a single location for viewing current and pending activities.

Using the **Compliance Management** dashboard and customized tiles reduces confusion and expedites processing activities. You can use roles and groups to provide users with access to only the information needed for their roles. For example, you can find annual recertification applications on the **Annual Recertification Dashboard**.

Users can use the **Search All** tile to view any applications that residents have started but not completed. This tile also provides quick access to a specific resident.

Compliance Management

Search All
Move In Dashboard
Annual Recertification Dashboard
Waiting List Dashboard
Market Application Dashboard
Compliance Manager

Results are as of 07/19/2021 10:18 AM. Click the "Refresh Dashboard Data" button to see the most recent changes and up-to-date information.

[Refresh Dashboard Data](#)

Search All

Search Applications

Household Page

Property:

Last Name:

Status:

Request Type:

Awaiting Follow-Up:

Email:

Prospect Code:

First Name:

SSN:

Unit Name:

New Document Added:

Created between:

Updates between:

Completed between:

Submitted between:

Preferred Move In:

Find

10 records per page Search:

Name	Property Name	Unit	Status	Request Type	Last Updated	Completed	Preferred Move In	Deposit	Date Submitted				
Payne, Jessica	Skyline Towers	SKY01	Submitted	Standard Tax Credit and HUD Annual Recertification	07/22/2021	06/18/2021	09/01/2020		06/18/2021				
Dav, Jason	Skyline Towers	SKY03	Pending - Verify	Standard Tax Credit and HUD Annual Recertification	07/22/2021	07/22/2021	09/01/2020						

Compliance Management Dashboard–Annual Recertification Dashboard

Most **Annual Recertification Dashboard** tiles involve actions that need to be addressed. These tiles organize tasks and help prevent team members from overlooking important pending actions.

The **Annual Recertification Dashboard** displays all completed items needing review and further action. You can click a tile to reveal additional information and perform the appropriate action.

Compliance Management

Search All
Move In Dashboard
Annual Recertification Dashboard
Waiting List Dashboard
Market Application Dashboard
Compliance Manager

Results are as of 07/19/2021 10:21 AM. Click the "Refresh Dashboard Data" button to see the most recent changes and up-to-date information.

[Refresh Dashboard Data](#)

Search All

Search Applications

1

Recertification

Is Due

2

Recert Apps

Pending

2

Pending Verify

0

Letters

Are Unanswered

2

Pending

Compliance

Approved

2

Incomplete

Corrections

Needed

0

Recertifications

Need Tenant Signatures

0

Recertifications

Need Countersignature

Recent Apps Pending Search:

	Name	Property Name	Unit	Status	Request Type	Last Updated	Completed	Preferred Move In	Deposit	Date Submitted				
	Pavon, Jessica	Skyline Towers	SKY01	Submitted	Standard Tax Credit and HUD Annual Recertification	06/18/2021	06/18/2021	09/01/2020		06/18/2021				
	Ray, Jason	Skyline Towers	SKY03	Incomplete	Standard Tax Credit and HUD Annual Recertification	06/18/2021		09/01/2020						

Household Page–Application

In RENTCafé, clicking a resident’s name displays the **Household Page**.

On the **Application** tab, you can click the **Compare to Previous Certification** button to compare the current certification to the resident’s previous certification in Voyager.

Household Name: Payne, Jessica (1)	Request Type: Annual Recertification
Registration Code: 13463-Tt0010258	Created Date: 06/09/2021
Property / Unit: Skyline Towers / SKY01 (2 Bedrooms)	Current Status: Submitted
SSN: ***.**-6788	Next Annual Recert Date: 9/1/2022
Actual Move-In Date: 9/1/2020	Language: English

Application	Members	Incomes	Assets	Expenses	Documents	Signed Documents	Errors & Alerts (0)	Notes	Audit Log
--------------------	---------	---------	--------	----------	-----------	------------------	---------------------	-------	-----------

Application Status: Submitted [Compare to Previous Certification](#)

Reason:

Std Deposit: 0.00

Deposit Override:

Timed Action Begin Time:

Compare Certification					
Previous Cert Effective Date: 9/1/2020		Previous Cert Total Annual Income Amount: \$20,212.60		Previous Cert Total Market Asset Value: \$120.98	
Previous Cert Type: Move In		Current Cert Total Annual Income Amount: \$15,034.00		Previous Cert Total Expense Cost: \$500.00	
				Current Cert Total Expense Cost: \$6,000.00	
Current Members					
Name	DOB	Relationship	SSN	Disability	Student
Payne, Jessica	4/1/1990	Head of Household	987-65-6788	No	
Payne, Matthew	2/2/2016	Dependent	000-11-1999	Yes	Yes
Previous Members					
Name	DOB	Relationship	SSN	Disability	Student
Payne, Jessica	3/2/1990	Head of Household	958-49-5839		No
Payne, Bruce	4/2/2013	Dependent	764-00-0000	Yes	Yes
Current Incomes					
Name	Income Type	Annual Income			
Jessica Payne	Other Wage	\$13,234.00			
Jessica Payne	Child Support	\$1,800.00			
Previous Incomes					
Name	Income Type	Annual Income			
Jessica Payne	Other Wage	\$17,812.60			
Jessica Payne	Child Support	\$2,400.00			
Current Assets					
Name	Source	Market Value	Yearly Income		
Jessica Payne	Wells Fargo	\$160.00	\$0.00		
Jessica Payne	Wells Fargo	\$560.00	\$0.00		
Previous Assets					
Name	Source	Market Value	Yearly Income		
Jessica Payne	Checking	\$120.98	\$0.00		
Current Expenses					
Name	Source	Yearly Cost			
Jessica Payne		\$6,000.00			
Previous Expenses					
Name	Source	Yearly Cost			
Bruce Payne	Medication	\$500.00			

■ - Updated Records
■ - Deleted Records
■ - Added Records

Household Page—Members

In RENTCafé, clicking a resident’s name displays the **Household Page**. The **Household Page** displays a list of all household members, their ages, disability status, and relationship to the household head.

RENTCafé has reviewed for completeness all information entered by the resident at each step in the recertification process. All resident information displayed will ultimately flow to the certification in Voyager.

Edit and **View** buttons appear on each tab of the Household Page.

- Use the **Edit** buttons for verification purposes.
- Use the **View** buttons to view the details entered by the resident. Site Manager users cannot make changes to this information.

Application	Members	Incomes	Assets	Expenses	Additional Occupants	Documents	Signed Documents	Errors & Alerts (0)	Notes	Audit Log
Compliance Application	Correspondence	All Verifications								
Add Member										
First Name	Last Name	Date of Birth	Disabled	Age	Verified	Sent Verification Letter	Manager	Applicant		
Colleen	Smith	2/1/1985	No	36	No	No	Edit	View		
Richard	Smith	5/9/1984	Yes	37	No	No	Edit	View		
Alexander	Smith	6/1/2017	No	4	No	No	Edit	View		

Household Page—Incomes

The **Incomes** tab provides details for each income source: the member earning the income, the income type, the resident-entered annual income, and the total verified annual income.

Updated income does not appear until verification has been completed. If you have not yet verified income, **No** appears in the **Verified** field. After verification, you can determine if you need to make corrections.

Application	Members	Incomes	Assets	Expenses	Additional Occupants	Documents	Signed Documents	Errors & Alerts (0)	Notes	Audit Log
Compliance Application	Correspondence	All Verifications								
Add Income										
Name	Income Source	Applicant Entered Income	Verified Earnings	Verified	Sent Verification Letter	Manager	Applicant			
Colleen Smith	Employment - Roswell Florist	\$31,200.00	\$31,557.50	Yes	Yes	Edit	View			
Colleen Smith	Regular Contribution - Mother	\$900.00		No	No	Edit	View			
Colleen Smith	Student Financial Aid - Georgia State	\$3,000.00		No	No	Edit	View			

Household Page–Assets

The **Assets** tab provides details for each asset: the member owning the asset, the asset type, the resident-entered asset value, and the verified asset value.

Zero (**0.00**) appears in the **Verified Income** field until verification is completed, ensuring that the correct verified asset value and income will appear on the calculation worksheet and certification. After verification, you can determine if you need to make corrections to asset value or income.

RENTCafé will always retain and display the original resident-entered information. During a file review, you can quickly display the information supplied by the resident compared to the independently verified information.

Name	Asset Name	Applicant Entered Value	Verified Value	Applicant Entered Income	Verified Income	Verified	Sent Verification Letter	Manager	Applicant
Colleen Smith	Checking Account - Wells Fargo	\$160.00	\$156.43	\$0.00	\$0.00	Yes	Yes	Edit	View
Colleen Smith	Savings Account - Wells Fargo	\$560.00	\$0.00	\$5.60	\$0.00	No	No	Edit	View

Household Page–Expenses

The **Expenses** tab provides details for each disability or medical expense entered by the resident: the member incurring the expense, the resident-entered cost, and the verified cost.

Zero (**0.00**) appears in the **Verified Annual Cost** field until verification is completed, ensuring that the correct verified expense amount will appear on the calculation worksheet and certification. After verification, you can determine if you need to make corrections.

RENTCafé will always retain and display the original resident-entered information. During a file review, you can quickly display the information supplied by the resident compared to the independently verified information.

Name	Expense Description	Applicant Entered Annual Cost	Verified Annual Cost	Verified	Sent Verification Letter	Manager	Applicant
Colleen Smith	Child Care Expense	\$7,200.00	\$0.00	No	No	Edit	View
Richard Smith	Auxiliary Apparatus/Assistance Animal Expense - Assistance Animal	\$1,200.00	\$0.00	No	No	Edit	View
Richard Smith	Medical Assistance	\$1,200.00	\$0.00	No	No	Edit	View

Household Page–Additional Occupants

The **Additional Occupants** tab displays member information for additional adult occupants.

The fourth column on this tab identifies whether the occupant is a lessee. For example, a live-in aide would be an additional occupant but would not be a lessee.

Application	Members	Incomes	Assets	Expenses	Additional Occupants	Documents	Signed Documents	Errors & Alerts (0)	Notes	Audit Log
Compliance Application		Correspondence		All Verifications						
Add Additional Occupant										
First Name	Last Name	Nickname	Relationship	Is Lessee?	Edit	Delete				
Richard	Smith		Spouse	Yes <input type="checkbox"/>	Edit	Delete				

Household Page–Documents

On the **Documents** tab, Site Manager users can view, print, delete, edit, and re-order any documents uploaded by the resident.

If you want to edit the information, click **Edit**. You can change the document name, mark the document as manager-view only, prevent the resident from deleting the document, and send the document to voyager.

The site manager user can also upload or scan documents if the resident is unable to do so.

Application	Members	Incomes	Assets	Expenses	Additional Occupants	Documents	Signed Documents	Errors & Alerts (0)	Notes	Audit Log	Compliance Application
Correspondence		All Verifications									
Print Documents											
You may drag and reorder any of the saved documents below.											
10 records per page										Search:	
Document	Document Name	Manager View Only	Send to Voyager	Uploaded Date	Size	Edit	Delete				
Richard Smith - Scan copy of social security card.											
Optional - Scan other household documents.											
Colleen Smith - Bank Account - Savings Account - Upload a copy of the most current account statement from the financial institution.											
Colleen Smith - Bank Account - Checking Account - Scan last 6 months of statements.											
Colleen Smith - Georgia State - Scan documents issued by the educational institution showing the amount of financial aid received	Georgia-new-front-1.png	No	Yes <input type="checkbox"/>	05/19/2021 4:02 PM	1.59 MB	Edit	Delete				
Richard Smith - Prescription Medication - Prescriptions - provide copies of receipts or printout from pharmacy showing out-of-pocket payments over the last 12 months.	Pharmacy Invoice	No	Yes <input type="checkbox"/>	05/19/2021 4:16 PM	165 KB	Edit	Delete				
Colleen Smith - Child Care Expense - Child Care - Provide copies of receipts for child care expenses.	Daycare Invoice	No	Yes <input type="checkbox"/>	05/19/2021 4:23 PM	11 KB	Edit	Delete				

Household Page–Signed Documents

On the **Signed Documents** tab, you can review any documents that were signed electronically. You can also print any documents requiring a wet signature.

If required, the site manager can countersign these documents.

Once signed, you can scan, attach, and place documents your required order.

Site Manager presents a reviewer with a completed application document printed in a clean, and easy-to-read format. If your organization uses electronic signatures, the signatures appear at the bottom of the application.

LEADING PRACTICE WORKFLOW – ANNUAL RECERTIFICATION

Application	Members	Incomes	Assets	Expenses	Additional Occupants	Documents	Signed Documents	Errors & Alerts (0)	Notes
Audit Log	Compliance Application	Correspondence	All Verifications						
View All		Email Documents							
Document	View	Sign	Counter Sign						
Household Documents for Colleen Smith to Sign	View Document (Signed)	Signing Complete	Click here to sign						
Member Documents for Colleen Smith to Sign	View Document (Signed)	Signing Complete	Click here to sign						
Household Documents for Richard Smith to Sign	View Document (Signed)	Signing Complete	Click here to sign						
Member Documents for Richard Smith to Sign	View Document (Signed)	Signing Complete	Click here to sign						

Sign Document

Required Actions

[NEXT](#)

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Owner's Notice #1 5/20/2021

Property name Skyline Towers **Head of household** Katherine Tapper

Dear Katherine Tapper,

Section 214 of the Housing and Community Development Act of 1980, as amended, prohibits the Secretary of HUD from making financial assistance available to persons other than U.S. citizens or nationals, or certain categories of eligible non-citizens, for the programs associated with this property.

You have applied, or are applying for, assistance at this property; therefore, you are required to declare U.S. citizenship or submit evidence of eligible immigration status for each of your family members for whom you are seeking housing assistance. Your household must do the following:

1. Complete a Family Summary Sheet which must list all family members who will reside in the assisted unit.
2. Complete a Citizenship Declaration for each family member listed on the Family Summary Sheet.
3. Provide sufficient evidence to back up each household member's declaration of citizenship or eligible non-citizenship status.

Submit the Family Summary Sheet, Citizenship Declaration(s), and documentation supporting each declaration to the name and address listed below by _____.

Skyline Towers
500 Colonial Center Pkwy
Roswell GA 30076

This Section 214 review will be completed in conjunction with the verification of other aspects of eligibility for assistance. If you need assistance with determining the type of documentation required or with completing any of the documents listed above, please contact the property at (770) 553-2555. Also, if you are unable to provide the required documentation by the date shown above, you should immediately contact this office and request an extension. Failure to provide this information or establish eligible status may result in denial of housing assistance.

If this Section 214 review results in a determination of ineligibility, you will have an opportunity to appeal the decision. Also, if the final determination concludes that only certain members of your family are eligible for assistance, your family may be eligible for prorated assistance. What this means is that when assistance is available, a reduced amount of assistance may be provided for your family based on the number of members who are eligible.

If assistance becomes available and the other aspects of your eligibility review show that you are eligible for housing assistance, that assistance may be provided to you if at least one member of your household has submitted the required documentation. Following verification of the documentation submitted by all family members, assistance may be adjusted depending on the immigration status verified. You will be contacted as soon as we have further information regarding your eligibility for assistance.

Sincerely,

Property Manager

[SIGN & COMPLETE](#)

Household Page—Errors & Alerts

The **Errors & Alerts** tab highlights any issues with the recertification and provides reminders to confirm items of specific interest to your community, such as compliance with pet or vehicle requirements.

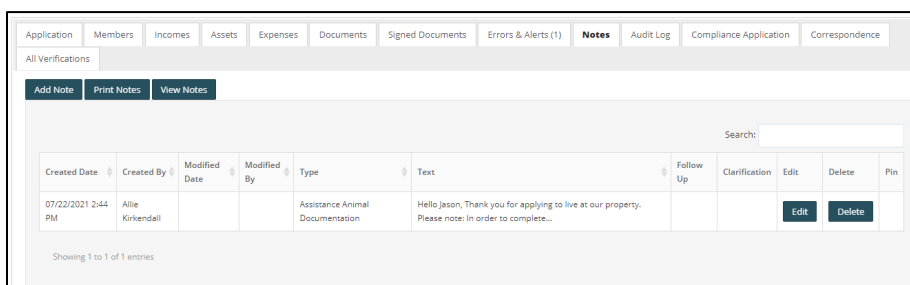
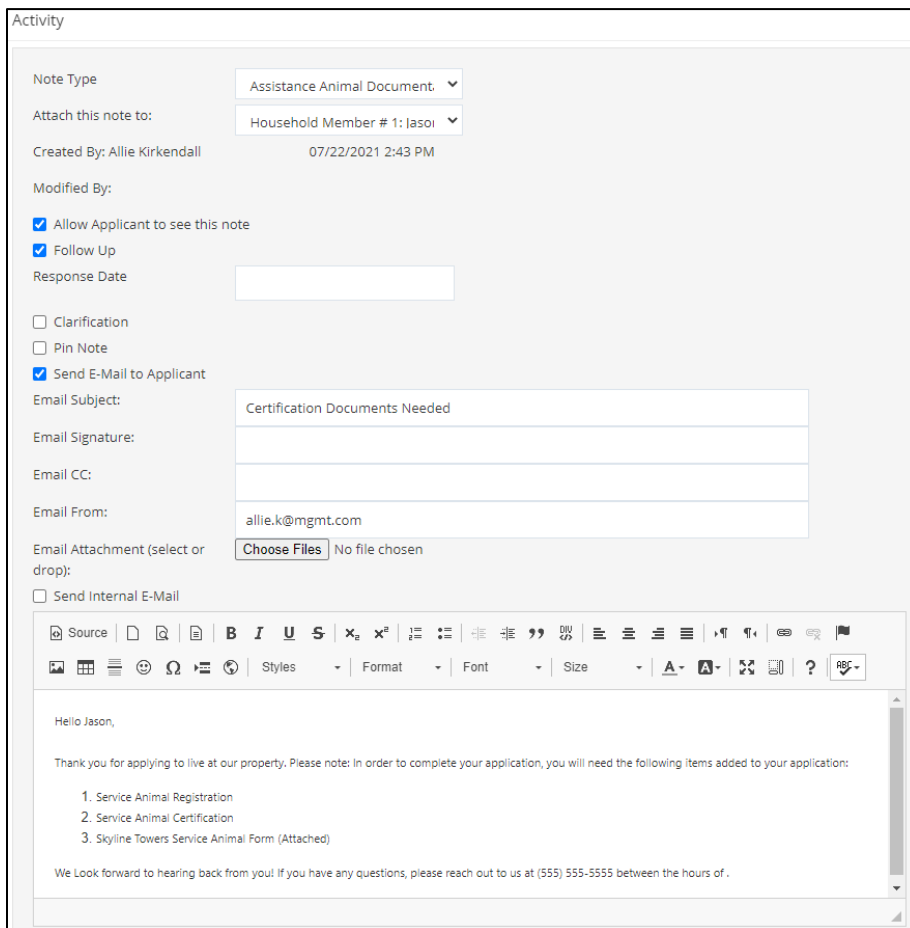
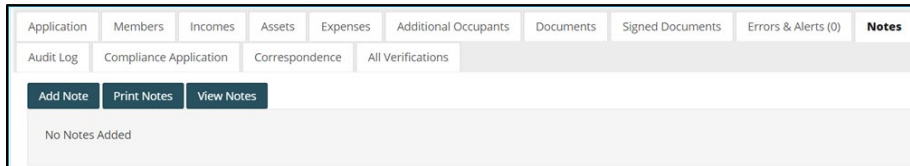
Application	Members	Incomes	Assets	Expenses	Additional Occupants	Documents	Signed Documents	Errors & Alerts (0)	Notes
Audit Log	Compliance Application	Correspondence	All Verifications						
Search: <input type="text"/>									
Error	Corrective Actions								
Please confirm that all assets have been entered for all household members. If you need to add a new asset please navigate back to the assets section and add the missing asset(s).	Confirmed								
Please confirm that all household members have been added. If you need to add a new member please navigate back to the members section and add the missing member(s).	Confirmed								
Please confirm that all incomes have been entered for all household members. If you need to add a new income please navigate back to the incomes section and add the missing income(s).	Confirmed								
Richard Smith has no income records. Confirm that this is correct or add an income record.	Confirmed								

Household Page–Notes

The **Notes** tab optimizes communication between team members by providing a central place to see all notes pertaining to an application or certification. You can send notes to an applicant, a resident, or a co-worker. Each note includes the recipient’s name and date sent, providing you with an audit log.

You can create “note type” templates that will automatically add note content for you. You can set up notes to generate automatically when the status of an application changes. For example, if you must consistently ask for additional documentation, create a template with text for your standard request. Select that text from the **Note Type** drop-down list the next time you request documentation.

Whether general or specific, you can attach notes to any information gathered on previous tabs for clarification or follow-up, reducing the time spent on emails and phone messages.



Household Page–Audit Log

The audit log displays a variety of information about household activities. The log tracks steps already completed, information entered on the application, changes made since the initial entry, and the person who created those changes.

Clicking **Show Detailed View** displays the specific details for each change, who made the change, and when the change was made. Updates to resident answers appear with a question mark (?). Clicking a question mark displays details of the original and updated information.

User	Date/Time	Description
Single	05/20/2021 4:59 PM	Manager Counter Signature Started for Colleen Smith's Individual Member Document
Single	05/20/2021 4:57 PM	Manager Counter Signature Started for Colleen Smith's Household Document
Richard Ellen	05/19/2021 4:59 PM	Document signing complete. Status changed to pending.
Richard Ellen	05/19/2021 4:59 PM	Status changed from Incomplete to Pending
Richard Ellen	05/19/2021 4:58 PM	ySignature Starting
Richard Ellen	05/19/2021 4:57 PM	ySignature Starting
Colleen Smith	05/19/2021 4:51 PM	HOH has invited Richard Smith to Sign Documents
Colleen Smith	05/19/2021 4:48 PM	ySignature Starting

Household Page–Compliance Application

The **Compliance Application** tab shows the full application as it appears for the resident. You can also reset the resident's current step in the application process.

This tab is very helpful when asks for assistance because the Site Manager user and resident are both is viewing the same screen.

Application		Members	Incomes	Assets	Expenses	Additional Occupants	Documents	Signed Documents	Errors & Alerts (0)	Notes	Audit Log	Compliance Application
Correspondence		All Verifications										
First Name	Last Name											
Colleen	Smith											Change Current Step
Showing 1 to 1 of 1 entries												

Household Page–Correspondence

The **Correspondence** tab displays all emails sent from the property in bulk.

For example, you notice that recertifications remain at the incomplete status for more than a week. You can send an email to all the residents at once. The sent emails will appear on the **Correspondence** tab.



Application													Members	Incomes	Assets	Expenses	Documents	Signed Documents	Errors & Alerts (0)	Notes	Audit Log	Compliance Application	Correspondence	All Verifications
Emails are sent periodically by a process running in the background. Email Status is as of 7/15/2021 5:43 PM																								
													Search:											
Name	Type	Subject	Sent By	Date Created	Status	Email Opened	Response Received	Acknowledgement Required	Acknowledgement Due Date	Update Waitlist Request	Reprint/Resend User	Reprint/Resend Date	Actions											
Compliance - Tax Credit Second Recertification Notice	Email	RENT/Caré - Second Recertification Notice	Colleen Single	06/09/2021 11:52 AM									Edit View											

Verification

The status of the recertification is now **Pending**. When you are ready to verify the information, you can change the secondary status to **Verify**, indicating to your team that this recertification is being verified.

Before verifying member, income, asset, or expense data, we need to send verification letters to the third parties. You can upload verification letters directly from Voyager.

Select a letter from the drop-down list. For example, if you want to send an employment verification letter, type the name of the letter. RENTCafé Affordable Housing uses progressive search to display all letters with matching names.

When you have selected the letter, select the correspondent. Type at least three characters of the name and click the **Search** button . If the correspondent is not yet on file, click the **Add Correspondent** button  and add the correspondent.

If an electronic signature is needed for the verification letter, RENTCafé Affordable Housing can produce the letter for signature. Clicking **Show to User** makes the letter available in the portal for your resident to electronically sign. An email is automatically sent alerting the household that a new document needs to be signed. Once signed, an email is sent to the property manager notifying the manager that the verification letter is signed.

If a signature is not required, click the **Printer** button to view and print the letter. Clicking **Save** automatically updates the sent date in Site Manager for each corresponding letter.

The **All-Verifications** tab displays all members of a household, along with their incomes, assets, and expenses. It provides a centralized view of the verification process. You can review all verification attempts, documents, details, status, and dates. You can quickly review verified items and verifications that need to be completed.

When you receive the verification response from the correspondent, you can upload a copy to the application from the **All Verifications** tab. These letters will also be submitted to Voyager.

Household Page

[Submit to Voyager](#)
[Save](#)
More ▾

Household Name: Day, Jason (1)	Request Type: Annual Recertification	Income Limit: \$0059 - \$30,150.00 Tax Credit - \$36,180.00
Registration Code: 13463-T10010263	Created Date: 06/18/2021	140% Income Limit: \$0059 - \$30,150.00 Tax Credit - \$36,180.00
Property / Unit: Skyline Towers / SKY03 (2 Bedrooms)	Current Status: Pending - Verify	Total Applicant Entered Income: \$0.00
SSN:	Next Annual Recert Date: 9/1/2021	Total Verified Income: \$0.00
Actual Move-In Date: 9/1/2020	Language: English	Verifications Complete: 0 of 2

Application
Members
Incomes
Assets
Expenses
Documents
Signed Documents
Errors & Alerts (1)
Notes
Audit Log
Compliance Application
Correspondence

All Verifications

Search:

Member	Relationship	Verification Type	Description	Status	Level	Date	Date Sent			
Jason Day	Head of Household	Member		Not Started				View Details	Upload Document	Add Note
Jason Day	Head of Household	Income	Target	Not Started				View Details	Upload Document	Add Note
Jason Day	Head of Household	Asset	BoA	Not Started				View Details	Upload Document	Add Note

LEADING PRACTICE WORKFLOW – ANNUAL RECERTIFICATION

Household Page

Household Name: Day, Jason (1)
 Registration Code: 13463-T0010263
 Property / Unit: Skyline Towers / SKY03 (2 Bedrooms)
 SSN:
 Actual Move-In Date: 9/1/2020

Request Type: Annual Recertification
 Created Date: 06/18/2021
 Current Status: Pending - Verify
 Next Annual Recert Date: 9/1/2021
 Language: English

Income Limit:
 140% Income L
 Total Applicant
 Total Verified In
 Verifications Co

Submit to Voyager Save More

- Calculate Rent to Income Ratio
- Change Status
- Delete Application
- Manage Certification Signature Documents
- Manage Verification Letters
- Move Applicant to Workflow
- Print Data Dictionary
- Return to Dashboard
- View Audit Log Report
- View Certification
- View Income Calculation Worksheet

Application Members Incomes Assets Expenses Documents Signed Documents Errors & Alerts (1) Notes Audit Log Compliance Ac

All Verifications

Search:

Member	Relationship	Verification Type	Description	Status	Level	Date	Date Sent			
Jason Day	Head of Household	Member		Not Started				View Details	Upload Document	Add Note
Jason Day	Head of Household	Income	Target	Not Started				View Details	Upload Document	Add Note
Jason Day	Head of Household	Asset	BoA	Not Started				View Details	Upload Document	Add Note

Save Date Received
View All Saved Letters

- 1) Select a letter from the drop-down list in the Letter column.
- 2) In the Search column, look up a correspondent code by typing at least three letters of the Correspondent description and clicking the magnifying glass.
- 3) Select the Correspondent from the drop-down list. (The person you want to send the letter to is the Correspondent.)
- 4) To add a new Correspondent, click on the green plus sign. (This new Correspondent can be associated with a Company, Property List or individual Property.)
- 5) Click the Print button. (This will populate the Date Sent column.)

Add Row	Member	Type	Source	Letter	Search	Correspondent	Delivery Method	Date Sent	Show To User	View
<input type="checkbox"/>	Colleen Smith	Member	none	Select an Option	<input type="text"/>		NA		<input type="checkbox"/>	
<input type="checkbox"/>	Colleen Smith	Expense		Select an Option	<input type="text"/>		NA		<input type="checkbox"/>	
<input type="checkbox"/>	Colleen Smith	Asset	Wells Fargo	Select an Option	<input type="text"/>		NA		<input type="checkbox"/>	
<input type="checkbox"/>	Colleen Smith	Asset	Wells Fargo	59assets-Asset Verification Letter 59	<input type="text"/>		NA		<input type="checkbox"/>	
<input type="checkbox"/>	Colleen Smith	Income	Roswell Florist	tcassets-Asset Verification Letter TC	<input type="text"/>		NA		<input type="checkbox"/>	
<input type="checkbox"/>	Colleen Smith	Income	Mother	59banking-Banking Account Verification 59	<input type="text"/>		NA		<input type="checkbox"/>	
<input type="checkbox"/>	Colleen Smith	Income	Georgia State	tcbanking-Banking Account Verification TC	<input type="text"/>		NA		<input type="checkbox"/>	
<input type="checkbox"/>	Richard Smith	Member	none	TCpropown-Real Property Owned TC	<input type="text"/>		NA		<input type="checkbox"/>	
<input type="checkbox"/>				TCunder_5k-Assets Under 5000\$ Self Affidavit TC	<input type="text"/>		NA		<input type="checkbox"/>	

Income Verification Example

In this example, we will use pay stubs for income verification.

1. For the income you want to verify, click **View Details**.
2. Click **Add New Verification–Income**.
3. Under **How did you verify the income information**, select **3rd Party Documents**.
4. Under **How was the income certified**, select **Pay Stubs**.
5. Add four different pay stub amounts and the frequency paid.

If your organization requires multiple verification sources, Site Manager can add multiple verification items and select the item you want to send to Voyager.

6. If you are using more than one source for these verifications, select the **Use This Verification Source** check box for your selected verification record to identify the source that you want submitted to Voyager. When this check box is selected, **Yes** appears in the **Active** column on the verification details screen.

Completing a verification updates the **Verifications Complete** message in the top part of the screen.

Verification Details x

Member Name: Katherine Tapper

Income Description: Target, Yearly Income: \$15,600.00

No verifications exist for this Income

[Add New Verification](#)

Add New Verification

Use This Verification Source

See File Copy for Calculation

HUD Income Type Other Wage ▾

How did you verify the income information? 3rd Party Documents ▾

How was the income certified? Pay Stubs ▾

Check 1	Check 2	Check 3	Check 4
\$300.00	\$300.00	\$300.00	\$300.00
Check 5	Check 6	Check 7	Check 8
\$0.00	0.00	0.00	0.00
Check 9	Check 10	Check 11	Check 12
0.00	0.00	0.00	0.00
Check 13	Check 14	Check 15	Check 16
0.00	0.00	0.00	0.00

Check Average Frequency Annual Income

\$300.0000 Weekly ▾ \$15,600.00

Notes [Text Area]

Asset Verification Example

In this example, we will verify an asset that earns interest.

1. Display the **All Verifications** tab and click **View Details**.
2. Click **Add New Verification–Assets**. You can enter up to six months of balances and corresponding interest rates.

NOTE: If no interest was earned for any given month, enter **0** and select **Include Zero Dollar Amounts in Calculation**. RENTCafé will include the zero amount when totaling annual income for the asset.

3. If you are using more than one source for these verifications, select the **Use This Verification Source** check box for your selected verification record to identify the source that you want submitted to Voyager. When this check box is selected, **Yes** appears in the **Active** column on the verification details screen.

Completing a verification updates the message in the top part of the screen.

Verification Details x

Member Name: Colleen Smith
 Asset Name: Wells Fargo, Market Value: \$160.00
 No verifications exist for this Asset

[Add New Verification](#)

Add New Verification x

Use This Verification Source

How did you verify the asset information? 3rd Party Documents ▼

How was the asset value certified? Interest Rates ▼

Include Zero Dollar Amounts in Calculation

Amount 1	Interest Rate Percent 1	Amount 2	Interest Rate Percent 2	Amount 3	Interest Rate Percent 3	Amount 4	Interest Rate Percent 4	Amount 5	Interest Rate Percent 5	Amount 6	Interest Rate Percent 6
<input type="text" value="\$160.00"/>	<input type="text" value="1.0000"/>	<input type="text" value="\$160.00"/>	<input type="text" value="1.0000"/>	<input type="text" value="\$160.00"/>	<input type="text" value="1.0000"/>	<input type="text" value="\$160.00"/>	<input type="text" value="1.0000"/>	<input type="text" value="\$160.00"/>	<input type="text" value="1.0000"/>	<input type="text" value="\$0.00"/>	<input type="text" value="0.0000"/>

Total Annual Income \$1.11

Notes

Submission to Voyager

Income Calculation Worksheet

Use the **Income Calculation Worksheet** to review how the income on the certification was verified and with which verification sources (if more than one). You can review the income and asset calculations before approving the certification.

Click the **More** button and select **Income Calculation Worksheet**.

You can email this report, if needed.

Submit to Voyager Save More

- Calculate Rent to Income Ratio
- Change Property
- Change Status
- Change Unit
- Delete Application
- Manage Certification Signature Documents
- Manage Verification Letters
- Move Applicant to Workflow
- Print Data Dictionary
- Return to Dashboard
- View Audit Log Report
- View Certification
- View Income Calculation Worksheet**

Email Report

1 of 1 Find | Next

Income Calculation Worksheet

Property Code: skyline Household: Jessica Payne Certification Date: 9/1/2021
 Property Name: Skyline Towers Unit Size: 2 Br
 Unit Code: SKY01 Certification Type: Annual Re-Certification

Household Members:

Member Name	Relationship	Gender	DOB	Age	Disabled	Student	Date Submitted
Jessica Payne	Head	F	4/1/1990	31			6/18/2021

Income Calculations:

Job Name	Member Name	Verification Type	Verification Method	Frequency	\$/Period	Number of Periods	Calculated Income	Verified Income
Target	Jessica Payne	Rate of Pay	Third Party Forms	Bi-Weekly	\$509.00	26.00	\$13,234.00	\$13,234.00
Child Support	Jessica Payne	Gross Detail	Third Party Forms	Monthly	\$150.00	12.00	\$1,800.00	\$1,800.00
Total of all Income Sources							\$15,034.00	

Asset Calculations:

Member Name	Description	Divest Cost	Market Value	Interest Rate	Annual Income
Jessica Payne	Wells Fargo	\$0.00	\$160.00	N/A	\$0.00
Jessica Payne	Wells Fargo	\$0.00	\$560.00	N/A	\$0.00
		\$0.00	\$720.00		\$0.00

Total Annual Income:

Total Mkt Value	Total Sale / Divest Cost	Total Asset Cash Value:	Pass Book Rate:	Total Income From Assets:
\$720.00	\$0.00	\$720.00	0.08%	\$0.00
Total Income:		Total From Assets:		Total Annual Income:
\$15,034.00		+ \$0.00		= \$15,034.00

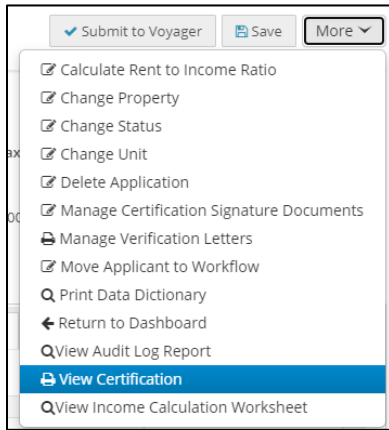
Total Expenses:

Member Name	Description	Frequency	Amount	Annual Expense
Jessica Payne		Yearly	\$6,000.00	\$6,000.00

Site Manager users can review the certification before submitting to Voyager.

Click the **More** button and select **View Certification**.

Enter the details of the certification you want to view. The certification appears in a new window.



View Certification

Cert Type*
 Recertification

Cert Effective Date*
 9/1/2021

Tax Credit Cert
 HUD 50059 Cert

Do you want to overwrite the existing certification in Voyager?
 No

Tenant Rent \$0.00
 Subsidy Amount \$0.00

NAHMA Household Type
 FA - Family

NAHMA Special Status
 D - Disabled

NAHMA Federal Subsidy Type

NAHMA Non-Federal Subsidy Type

NAHMA Is Self Certified?

View Certification Cancel

10/09/2019 **TENANT INCOME CERTIFICATION** Effective Date: 09/01/2021
 Initial Certification Recertification Other Move-in Date: 09/01/2020
 (MM/DD/YYYY)

PART I. DEVELOPMENT DATA

Property Name: Skyline Towers County: BIN #: 9000000
 Address: 500 Colonial Center Pkwy, Roswell, GA 30076 Unit Number: SKY01 #Bedrooms: 2

PART II. HOUSEHOLD COMPOSITION

HH Mbr #	Last Name	First Name & Middle Initial	Relationship to Head of Household	Date of Birth (MM/DD/YYYY)	F/T Student (Y or N)	Last 4 Digits of Social Security No. if applicable
1	Payne	Jessica	H	04/01/1990	N	6788
2	Payne	Matthew	C	02/02/2016	Y	1999
3						
4						
5						
6						
7						
8						

PART III. GROSS ANNUAL INCOME (USE ANNUAL AMOUNTS)

HH Mbr #	(A) Employment or Wages	(B) Social Security/Pensions	(C) Public Assistance	(D) Other Income
1	13,234.00	0.00	0.00	1,800.00
TOTALS	\$ 13,234.00	\$ 0.00	\$ 0.00	\$ 1,800.00

Add totals from (A) through (D), above TOTAL INCOME (E): \$ 15,034.00

PART IV. INCOME FROM ASSETS

HH Mbr #	(F) Type of Asset	(G) C/I	(H) Cash Value of Asset	(I) Annual Income from Asset
1	Wells Fargo	C	160.00	0.00
1	Wells Fargo	C	560.00	5.00
TOTALS:			\$ 720.00	\$ 5.00

Enter Column (H) Total If over \$5,000 \$ 0.00 X Current Passbook Rate = 0.06% (J) Imputed Income \$ 0.00
 Enter the greater of the total of Column (I) or (J); imputed income TOTAL INCOME FROM ASSETS (K) \$ 5.00
 (L) Total Annual Household Income from All Sources (A, B, C, D, E) + (K) \$ 15,039.00

Submit the certification to Voyager.

When the verification process is completed and the resident has been re-certified for the program, click **Submit to Voyager**. RENTCafé pushes all information gathered and verified to Voyager and create the household’s annual recertification in Voyager.

Household Page

✔ Submit to Voyager
Save
More ▾

Prospect Code Tenant Code: p0010784 t0006259	Created Date: 07/20/2021	Last Updated Date: 07/20/2021
Household Name: Grant, Nicholas (2)	Current Status: Pending	Property / Unit: Ashwood Gardens / 105 (1)

Submit to Voyager

Cert Type* Recertification ▾	Tenant Rent <input type="text" value="\$0.00"/>
Cert Effective Date* <input type="text" value="9/1/2021"/>	Subsidy Amount <input type="text" value="\$0.00"/>
<input checked="" type="checkbox"/> Tax Credit Cert <input checked="" type="checkbox"/> HUD 50059 Cert	NAHMA Household Type FA - Family ▾
	NAHMA Special Status D - Disabled ▾
	NAHMA Federal Subsidy Type ▾
	NAHMA Non-Federal Subsidy Type <input type="text"/>
	<input type="checkbox"/> NAHMA Is Self Certified?

Submit to Voyager
Cancel

Household Page

✔ Resubmit to Voyager
✔ Resubmit Documents to Voyager
Save
More ▾

Submitted to Voyager

Prospect Code Tenant Code: p0010784 t0006913	Created Date: 11/08/2017	Last Updated Date: 11/08/2017
Household Name: Smith, Reggie (3)	Current Status: Submitted	Property / Unit: Magnolia Glen Apartments / 227 (2 Bedrooms)
Registration Code: 3783-Tt0006913	Total Applicant Entered Income: \$16,900.00	Most Recent Cert Effective Date: 12/1/2018
Most Recent Cert Type: AR	Total Verified Income: \$21,455.50	SSN: 909-89-8989
Preferred Move-In Date: 12/01/2016	Language: English	Next Annual Recert Date: 1/1/2021

Recertification and Lease Renewal Signing Processes

Signing the Certification in RENTCafé

After submitting the certification to Voyager, you are now ready to sign the certification.

On the **Household Page**, click the **More** button and select **Manage Certification Signature Documents**.

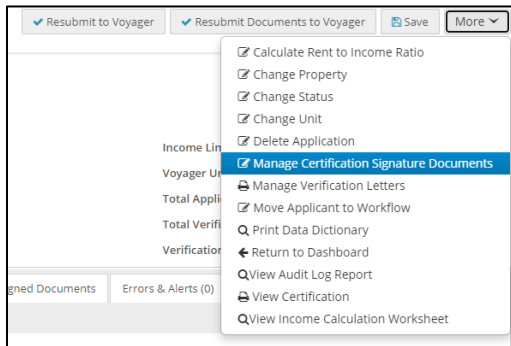
If the property has multiple affordable housing programs, you will see all certifications that were created.

Select **Show [applicable certification] To User**. An email is automatically sent notifying the resident that a certification is ready to be signed. The resident will click the link in the email and log on to the resident’s portal. There will now be new a document available for that resident to sign.

Once the resident signs, an email is sent to the property management team to countersign. Under **Manage Certification Signature Documents**, a **Countersign** button appears for the site manager.

When all parties have signed, a new option, **Send TIC to Voyager**, appears.

When the certification is completely signed, the completion dates must be entered in Voyager to lock the certification.




Manage Compliance Documents

TIC Signing						
	Visibility to User	Re-Send Certification Invitation E-Mail		Send Certification to Voyager	View Certification	TIC to Use
TIC Effective 5/19/2021	<div style="border: 2px solid red; padding: 2px;"> Show TIC To User <input checked="" type="checkbox"/> Send email to user? </div>	N/A	Counter Sign Pending User Signature	Send TIC To Voyager Pending Signatures	View TIC	National TIC

50059 Signing						
	Visibility to User	Re-Send Certification Invitation E-Mail	Counter Sign Certification	Send Certification to Voyager	View Certification	TIC to Use
50059 Effective 5/19/2021	<div style="border: 2px solid red; padding: 2px;"> Show 50059 To User <input checked="" type="checkbox"/> Send email to user? </div>	N/A	Counter Sign Pending User Signature	Send 50059 to Voyager Pending Signatures	View 50059	N/A

Applications & Certifications



The Lofts
88 Kingston Ave
Santa Barbara, CA 93117

Account Information

- 👤 Type: Annual Recertification
- 👤 Status: Submitted
- 👤 Last Update Date: 7/22/2021
- 👤 Created Date: 5/3/2021

Submitted

Tax Credit Certification

Name	Status	Action
Nina George	Not Signed	✍️ Sign

50059 Certification

Name	Status	Action
Nina George	Not Signed	✍️ Sign

Sign Document (Document 1 of 1) Page 1 of 2

Required Actions: NEXT

10/09/2019

TENANT INCOME CERTIFICATION

Effective Date: 09/01/2021
 Move-in Date: 09/01/2020

Initial Certification Recertification Other

Property Name: Skelton Towers County: SKY05 BIN #: 8000000
 Address: 500 Colonial Center Pkwy, Roswell, GA 30076 Unit Number: #Bedrooms: 2

PART II. HOUSEHOLD COMPOSITION

HH Mbr #	Last Name	First Name & Middle Initial	Relationship to Head of Household	Date of Birth (MM/DD/YYYY)	F/T Student (Y or N)	Last 4 Digits of Social Security No. if applicable
1	Lane	Parker	H	06/04/1981	N	5588
2	Lane	Cindy	S	03/04/1979	N	1479
3						
4						
5						
6						
7						
8						

Manage Compliance Documents

TIC Signing

Visibility to User	Re-Send Certification Invitation E-Mail	Counter Sign TIC	Send Certification to Voyager	View Certification	TIC to Use
TIC Effective 9/1/2021	TIC Signed by User	N/A	Send TIC To Voyager	View TIC	National TIC

50059 Signing

Visibility to User	Re-Send Certification Invitation E-Mail	Counter Sign Certification	Send Certification to Voyager	View Certification	TIC to Use
50059 Effective 9/1/2021	50059 Signed by User	N/A	Send 50059 to Voyager	View 50059	N/A

Manage Compliance Documents

TIC Signing

Visibility to User	Re-Send Certification Invitation E-Mail	TIC Counter Signed	Send Certification to Voyager	View Certification	TIC to Use
TIC Effective 9/1/2021	TIC Signed by User	N/A	Send TIC To Voyager	View TIC	National TIC

50059 Signing

Visibility to User	Re-Send Certification Invitation E-Mail	Counter Sign Certification	Send Certification to Voyager	View Certification	TIC to Use
50059 Effective 9/1/2021	50059 Signed by User	N/A	Send 50059 to Voyager	View 50059	N/A

Lease Generation and Signing

After signing the certification, the site manager’s next step is generating the lease.

On the **Leasing Dashboard**, find the resident. Click the resident’s link to display the **Lease Information** page. In the **Signature Documents** section, you can review all steps of the lease generation process.

To preview the lease before generating it, click **New Lease Document**.

When you are ready to generate the lease document, click **Generate**. Once generated, the site manager can view, download, or print the lease.

To send the finalized lease to the resident for signature, click **Finalize and Send Signature Request**.

The resident will receive an email notifying the resident that a new lease document is available. All lease holders in the household will need to log on to their resident portals to review and sign the lease.

When all lease holders have signed, the property management team will receive an email to countersign the lease. On the **Lease Information Page** in Site Manager, select **Sign Online**.

Countersigning the lease executes it. The signed document can always be viewed, downloaded, or printed under **Signature Documents**. The signed lease will also be saved in the **Attachments** section on the household's **Resident** screen in Voyager.

Leasing Management

PROPERTIES (1) RESIDENT CURRENT Search

+Additional Filters

0
Lease
Needs Generation

0
Lease
Needs Finalization

0
Lease
Needs Signatures

0
Lease
Needs Countersignatures

0
Document
Needs Signatures

0
Document
Needs Countersignatures

Search:

Name	Property	Additional Occupants	Status	Alerts	Actions
Parker Lane allrecertaining@parkerlane@gmail.com (861) 520-1748 Unit SKY05 10010278	Skyline Towers	Cindy Lane	Status: Current Registered Move In: 9/1/2020 Lease Expiration: 8/31/2021	1 of 1 docs signed 0 of 0 docs uploaded	

Lease Information Back to Leasing Dashboard More

Parker Lane Primary

Voyager Code: 10010278
Email: allrecertaining@parkerlane@gmail.com
Phone: (861) 520-1748
DOB:
Preferred Method of Contact:
Docs:

Current Resident

Lease From: 9/1/2020
Lease To: 8/31/2021
Move In Date: 9/1/2020

Apartment # SKY05

Details: 2bd/2.0ba | 1200 Sq.Ft.
Rent: \$1,000.00/mo
Skyline Towers
500 Colonial Center Pkwy
Roswell, GA 30076

Additional Occupants

Name	Details	Relationship	Lessee	Status	Documents
Cindy Lane			<input checked="" type="checkbox"/>	Not Registered	

Signature Documents: Pending Generation

Pending Generation (1)
Not Started (0)
In Progress (0)
Pending Countersign (0)
Completed (0)

New Lease Document
Parker Lane Cindy Lane
[Preview](#) Generate

sitemanager.rentcafe.com says

Are you sure you want to Generate the document?

OK

Cancel

Signature Documents: Pending Generation

Pending Generation (1)
Not Started (0)
In Progress (0)
Pending Countersign (0)
Completed (0)

New Lease Document | © 7/27/2021 2:44:01 PM | [View](#) | [Download](#) | [Print](#)
Parker Lane Cindy Lane




Data used in this document may have changed recently. Please preview possible changes and then regenerate the document if needed.

[Preview Changes](#) | [Regenerate](#) | Finalize & Send Signature Request

Please Note


Please note that the document will not be available to the Resident until you click on Finalize & Send Signature Request button.

Payments | Lease | Compliance | Maintenance Request

My Accounts   

Logged in as: Parker Lane - 500 Colonial Center Pkwy SKY05

Sign Documents

New Lease Document	Parker Lane (Lessee)		View Download Print
	Cindy Lane ()	Not Started	





Signature Documents: Pending Countersign

Pending Generation (0) | Not Started (0) | In Progress (0) | Pending Countersign (1) | Completed (0)

 New Lease Document | 7/27/2021 2:44:01 PM | View | Download | Print


• Parker Lane 7/27/2021 2:59:40 PM • Cindy Lane 7/27/2021 3:12:08 PM

Data used in this document may have changed recently. Please preview possible changes and then regenerate the document if needed.

 Preview Changes |  Regenerate |  Sign Online |  Mark Complete



Signature Documents: Completed

Pending Generation (0) | Not Started (0) | In Progress (0) | Pending Countersign (0) | Completed (1)

 New Lease Document | 7/27/2021 2:44:01 PM | View | Download | Print

• Parker Lane 7/27/2021 2:59:40 PM • Cindy Lane 7/27/2021 3:12:08 PM

Data used in this document may have changed recently. Please preview possible changes and then regenerate the document if needed.

 Preview Changes |  Regenerate