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# RENTCafé® Affordable Housing

## Leading Practice Workflow—Standard Move-In

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 compliance 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. Standard workflows and verifications 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 Housing can:

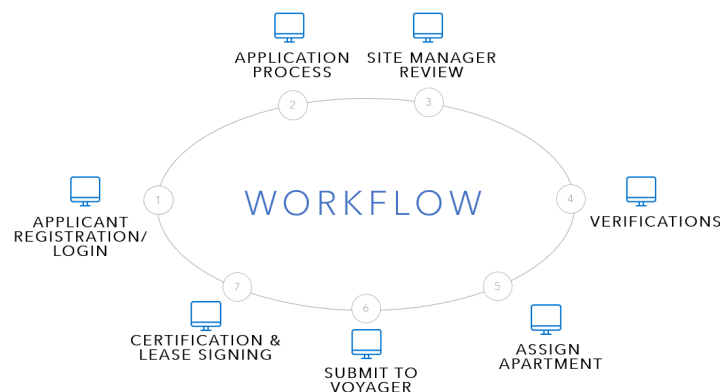
- Reduce errors and expedite processing of compliance files.
- Electronically manage paperwork.
- Heighten communication among team members, applicants, and residents.
- Assign tasks to team members based on file status.
- Provide a central location for all information related to applications and certifications.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

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

### Workflow

- The applicant either registers or log on to the prospect portal.
- The applicant completes the online application process.
- When the applicant submits the move-in 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 and sends them to the applicant's portal for release.
  - Assigns the applicant to an apartment.
  - Sends the applicant's submission to Voyager, where the certification is automatically created.
  - Sends certifications and leases for applicant signatures.

The following graphic shows a high-level overview of the move-in workflow.



## Site Manager Introduction

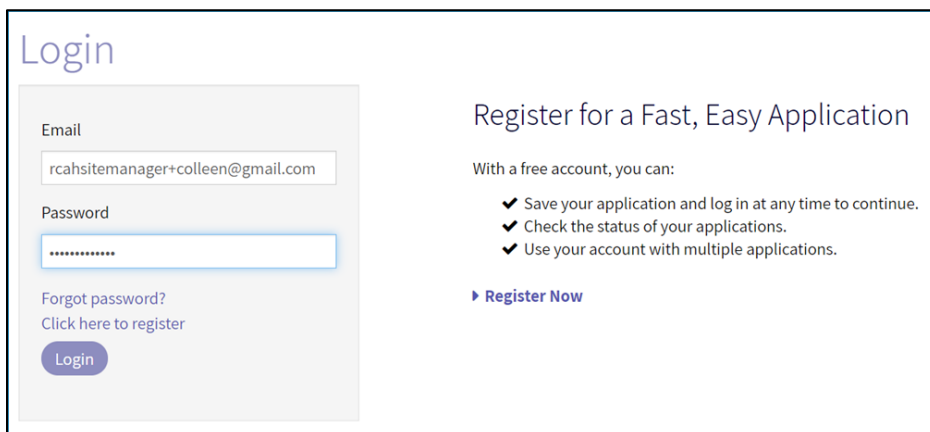
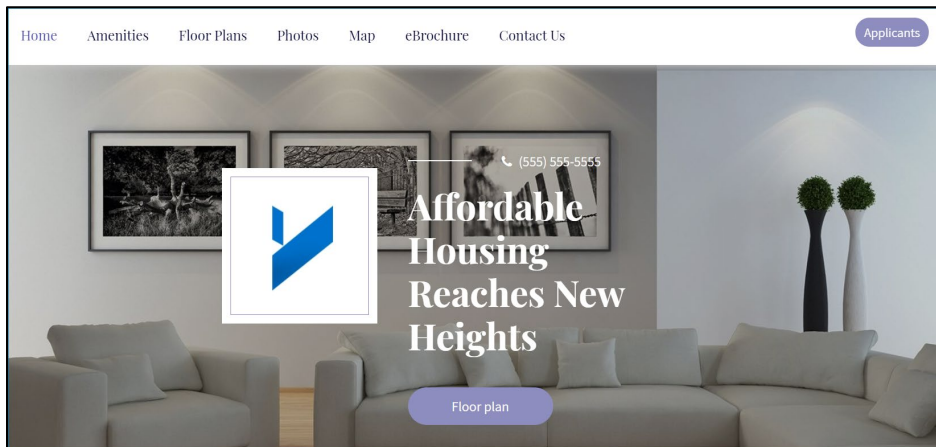
- **Compliance Dashboard**  
Site Manager saves filters based on last search by the same user. Use these filters to limit the records that appear. You can also search by secondary status.
- **Custom Dashboard**  
Each role has different tiles assigned, based on the role responsibilities and the information 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.

## Applicant Portal Login/Registration Overview

### Applicant Log-on

A prospect must register to begin the application process. After registering, the applicant can log on and off the site as needed. When an applicant logs off, RENTCafé saves the applicant’s completed information. When the applicant logs on, RENTCafé displays the step from which the applicant logged off.

When an applicant has registered, the log-on screen appears.



## Registration Process

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

New applicants will apply for the property by setting up a RENTCafé account. Applicants will be asked whether they have a registration code. The registration code is the prospect code (“p-code” in Voyager). The prospect code will help ensure that the applicant is tied to an existing guest card.




### Create an Account

I have a registration code

I do NOT have a 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!

---

#### 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](#)

## Applicant Portal–Application Process

### Language Selection

An applicant’s first step is to select a preferred language. Allowing an applicant to complete the application in the applicant’s preferred language will make the application process easier and may reduce the amount of help applicants need from your staff.

You as the administrator can decide which languages to make available for each property.

**My Application**

Application Progress 0%

Applications & Certifications | Hi, Colleen

\* 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

### Lease Term

You can configure leading practice workflows built in to RENTCafé Affordable Housing to match the way each property operates. In this example, the property has 50059 and tax credit apartments. Although this property has a waiting list, RENTCafé asks the applicant for a requested move-in date.

**My Application**

Application Progress 1%

Applications & Certifications | Hi, Colleen

\* Denotes a required field

**Please enter your preferred move-in date and select a lease term**

**Basic Lease Information**

Move-in Date: \*

5/19/2021

Lease Term: \*

12

Back Next

## Personal Information

The **Personal Information** step builds the applicant’s guest card. Some fields also apply to the applicant’s screening and to the certification in Voyager.

If your organization wants an additional step to help determine which workflow the applicant must complete, you can add a step that asks applicants to provide basic eligibility information. For example, if an applicant enters an annual income of \$100,000, RENTCafé Affordable Housing would determine that the prospect does not qualify and stop the applicant at this step. If the property has market rate apartments, RENTCafé can move the applicant through a market rate workflow.

### Application

- Language Selection
- Lease Term
- Personal Information
- Address Information
- Additional Adult Occupants
- Pets/Assistance Animals
- Special Unit Requirements
- Minor Occupants/Member Details
- Member Student Status
- Household Student Status
- Live-In Aide
- Household Questions
- Anticipated Household Additions
- Income
- Assets
- Final Review & Submission

\* Denotes a required field

## Personal Information

First Name \*

Middle Initial

Last Name \*

Home Phone \*

Cell Phone

I do not have a Social Security Number right now.

State Issued ID #

State Issued

What is this household's displacement status? \*

What is this household's current housing situation? \*

List all states and counties in which you and all adult household

## Address Information

Your requirements for resident history can be built into RENTCafé Affordable Housing. For example, if you require three years of history, the applicant will not be able to move forward until entering enough information to satisfy that requirement.

My Application

Application Progress 4%

Applications & Certifications | Hi, Colleen ▼

Language Selection

Lease Term

Personal Information

Address Information

Additional Adult Occupants

Pets/Assistance Animals

Special Unit Requirements

Minor Occupants/Member Details

Member Student Status

Household Student Status

Live-In Aide

Household Questions

Anticipated Household Additions

\* Denotes a required field

### Address Information

List all previous residences for the past 24 months.

Add Address

I have no address.

No Addresses Added

Back

Next

### Address Information

This address is not in the United States or Canada.

Current Address

Address\*

45 Main St

Address Line 2

City\*

Roswell

State\*

GA ▼

ZIP Code\*

30009

Residency Start Date\*

3/1/2012

Own/Rent/Other\*

Rent ▼

Rent per month\*

\$650.00

Landlord Name\*

Bob Newman

Property/Landlord Phone\*

(404) 555-2312

My mailing address is the same as my physical address.

Is this a government subsidized development?\*

No ▼

Save

Cancel



## Additional Adult Occupants

This step asks the applicant to include all occupants over the age of 18. These household members need to be screened. The applicant will enter other household members, including members under 18, later.

The screenshot shows a web application interface for a move-in process. On the left is a sidebar menu with various application steps, including 'Additional Adult Occupants' which is currently selected. The main content area shows a progress bar at 5%, a title 'Additional Adult Occupants', and a note that only people 18 or older should be included. There is a button to 'Add Additional Adult Occupant' and a message stating 'No Additional Adult Occupants Added'. Navigation buttons for 'Back' and 'Next' are visible at the bottom.

The screenshot displays a form titled 'Your Additional Occupant' with a sub-section for 'Personal Information'. The form contains several input fields: 'First Name\*' (Richard), 'Middle Initial' (empty), 'Last Name\*' (Smith), 'Social Security Number\*' (003-54-1111), 'Monthly Income\*' (\$0.00), and 'Birth Date\*' (5/9/1984). There is also a checkbox for 'This person does not have a Social Security Number right now.' and a dropdown menu for 'What is this person's relationship to the head of household?' set to 'Spouse'. An email field contains 'rcahsitemanager+rsmith@gmail.c'.

## Emergency Contact

If the applicant wants to provide emergency contact information, the applicant adds the information on this step. This information will appear on the form HUD-92006.

**My Application**

Application Progress **6%** Applications & Certifications | Hi, Colleen

\* Denotes a required field

### Emergency Contact

**Instructions: Optional Contact Person or Organization:** You have the right by law to include as part of your application for housing, the name, address, telephone number, and other relevant information of a family member, friend, or social, health, advocacy, or other organization. This contact information is for the purpose of identifying a person or organization that may be able to help in resolving any issues that may arise during your tenancy or to assist in providing any special care or services you may require. **You may update, remove, or change the information you provide on this form at any time.** You are not required to provide this contact information, but if you choose to do so, please include the relevant information on this form. Your household may provide an emergency contact. If your household does not wish to provide this information, click Save and Continue.

[Add Emergency Contact](#)

No Emergency Contacts Added

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

### Your Emergency Contact Information

Name\*

Harriet Jones

What is this person's relationship to the head of household?

Friend

Home Phone/Cell Phone\*

(404) 888-4354

#### Reason for Contact (choose all that apply)

- Emergency
- Unable to contact you
- Termination of rental assistance
- Eviction from unit
- Late payment of rent

## Pets/Assistance Animals

On this step, the household can add information about pets or assistance animals.

The screenshot shows the 'My Application' interface with the 'Pets/Assistance Animals' step selected. The application progress is at 9%. The main heading is 'Pets/Assistance Animals' with the question 'Does your household have or anticipate having any pets or assistance animals?'. There is an 'Add Pet/Assistance Animal' button and a message 'No Pets/Assistance Animals Added'. Navigation buttons for 'Back' and 'Next' are visible.

## Special Apartment Requirements

If an applicant wants to be placed in an apartment with special accommodations, the applicant provides the special needs information on this step.

The screenshot shows the 'My Application' interface with the 'Special Unit Requirements' step selected. The application progress is at 9%. The main heading is 'Special Unit Requirements' with the text 'Persons with physical impairments may request a dwelling unit designed specifically to accommodate individuals with mobility, hearing and/or sight disabilities.' It lists criteria for an accessible unit and asks 'Would you like to provide information to help determine your eligibility for special accessible housing features?'. There is a dropdown menu and 'Back'/'Next' buttons.

## Member Details

On this step, the applicant adds detailed information about each household member, including members under the age of 18. Information includes citizenship, disability status, race, ethnicity, and student status.

Information completed during earlier steps in the workflow automatically appears.

The screenshot shows the 'My Application' interface with the 'Members of the Household' step selected. The application progress is at 10%. The main heading is 'Members of the Household' with instructions for adults and minors. There is an 'Add Minor' button and a table listing household members. Navigation buttons for 'Back' and 'Next' are visible.

First Name	Last Name	Date of Birth	Edit	Delete
Colleen	Smith	2/1/1985	More Info Needed	Delete
Richard	Smith	5/9/1984	More Info Needed	Delete

Showing 1 to 2 of 2 entries

## Member Student Status

If the household is applying for a tax credit apartment, each household member must provide information regarding current student status. Examples of the questions asked are student status, type of education, and the name of the student’s educational institution.

**My Application**

Application Progress **11%** | Applications & Certifications | Hi, Colleen

\* 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
Colleen Smith	Incomplete	<a href="#">Edit</a>
Richard Smith	Incomplete	<a href="#">Edit</a>

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 applicant must select one of the following statements about student status.

**My Application**

Application Progress **13%** Applications & Certifications | Hi, Colleen

\* Denotes a required field

### 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 applicant's household will include a live-in aide, the applicant completes this step.

**My Application**

Application Progress **14%** Applications & Certifications | Hi, Colleen

\* Denotes a required field

### 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](#)

## Household Questions

On this step, the applicant answers questions relating to the entire household. The applicant selects **Yes** or **No** for each question. The answers determine additional questions that appear.

The screenshot shows the 'Household Questions' step in the application process. The progress bar indicates 15% completion. The left sidebar lists various application sections, with 'Household Questions' highlighted. The main content area contains several questions with dropdown menus for 'Yes' or 'No' answers. A text input field is used for an explanation. The questions are:

- Have you or any member of your household ever used different names from the names given on this application? \* (Answer: Yes)
- Will all minor household members live in this unit with a parent or guardian who has at least 50% custody? \* (Answer: Yes)
- If yes, explain: \* (Text input: Colleen - Maiden Name: Colleen Kramer)
- Is any member of this household temporarily absent, but under normal conditions would live in the unit? \* (Answer: No)
- Have you or any member of your household ever used social security numbers different from those listed on this application? \* (Answer: No)
- Are you or any member of your household subject to a lifetime sex offender registration requirement in any state? \* (Answer: No)

Buttons for 'Back' and 'Next' are visible at the bottom.

## Anticipated Household Additions

The applicant can add anticipated household members expected over the next 12 months, including unborn children.

The screenshot shows the 'Anticipated Household Additions' step in the application process. The progress bar indicates 16% completion. The left sidebar lists various application sections, with 'Anticipated Household Additions' highlighted. The main content area contains a heading and instructions:

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.

A button labeled 'Add Anticipated Household Addition' is present. Below it, a message states 'No Anticipated Household Additions Added'. Buttons for 'Back' and 'Next' are visible at the bottom.

## Income

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

### Application

- Language Selection
- Lease Term
- Personal Information
- Additional Adult Occupants
- Pets/Assistance Animals
- Special Unit Requirements
- Minor Occupants/Member Details
- Member Student Status
- Household Student Status
- Live-In Aide
- Household Questions
- Anticipated Household Additions
- Income**

\* 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 type="radio"/> Yes <input type="radio"/> No
Regular Pay for a Member of the Military? *	<input type="radio"/> Yes <input type="radio"/> No
Self-Employment Income? *	<input type="radio"/> Yes <input type="radio"/> No
Unemployment Benefits or Severance Pay? *	<input type="radio"/> Yes <input type="radio"/> No
Insurance Settlements/Workers' Compensation? *	<input type="radio"/> Yes <input type="radio"/> No
Social Security Income (Social Security Benefits or SSDI)? *	<input type="radio"/> Yes <input type="radio"/> No
Supplemental Security Income (SSI)? *	<input type="radio"/> Yes <input type="radio"/> No
Disability Benefits Excluding Social Security Disability Insurance (SSDI)? *	<input type="radio"/> Yes <input type="radio"/> No
Public Assistance (excluding food stamps and medical assistance)? *	<input type="radio"/> Yes <input 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 type="radio"/> No

### My Application

- Language Selection
- Lease Term
- Personal Information
- Additional Adult Occupants
- Pets/Assistance Animals
- Special Unit Requirements
- Minor Occupants/Member Details
- Member Student Status
- Household Student Status
- Live-In Aide
- Household Questions
- Anticipated Household Additions
- Income
- Employment**

Application Progress 19% Applications & Certifications | Hi, Colleen ▾

\* 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

### My Application

- Language Selection
- Lease Term
- Personal Information
- Additional Adult Occupants
- Pets/Assistance Animals
- Special Unit Requirements
- Minor Occupants/Member Details
- Member Student Status
- Household Student Status
- Live-In Aide
- Household Questions
- Anticipated Household Additions
- Income
- Employment
- Regular Contributions**

Application Progress 33% Applications & Certifications | Hi, Colleen ▾

\* Denotes a required field

### Please tell us about any regular cash and non-cash contributions

Include all income received through regular contributions to the household. Please note, this includes anyone supplementing your income, providing assistance with paying bills, or gifts from individuals not living in the unit (not including groceries).

Add Regular Contribution

No Regular Contributions Added

Back
Next

## 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.

**My Application**

Application Progress: 44%

Applications & Certifications | Hi, Colleen

\* 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	
Richard Smith	More Info Needed

Showing 1 to 1 of 1 entries

Back Next

## Non-Employment

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

**My Application**

Application Progress: 45%

Applications & Certifications | Hi, Colleen

\* 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	
Richard Smith	More Info Needed

Showing 1 to 1 of 1 entries

Back Next

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



## Assets

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

My Application

Application Progress 46%

Applications & Certifications | Hi, Colleen

\* 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? \*  Yes  No

Savings Accounts? \*  Yes  No

Cash Cards (including government benefits cards)? \*  Yes  No

Stocks? \*  Yes  No

Bonds? \*  Yes  No

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

My Application

Application Progress 48%

Applications & Certifications | Hi, Colleen

\* 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

Checking Accounts

## Childcare Expenses

On this step, the applicant answers a question about childcare expenses paid to an outside source so 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.

My Application

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

Child Care Expenses

My Application

Application Progress 76%

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 applying 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: Applicants for properties with only tax credit assistance will not be asked about expenses.

### Disability Expenses

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

My Application

Application Progress 79%

Applications & Certifications | Hi, Colleen

\* Denotes a required field

Next, we will need to gather information about your household's disability assistance expenses.

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

Expenses paid for attendant care for a disabled household member that enable an adult household member to work? \*  Yes  No

Expenses paid for the cost of an auxiliary apparatus or assistance animal for a disabled household member, including costs for maintenance and upkeep? \*  Yes  No

Back Next

Disability Assistance Expenses

Tell Us About Auxiliary Apparatus/Assistance Animals

Expense Details

Who incurs this expense? \*  
Richard Smith

How much is each expense payment? \*  
\$100.00

What is the description of this expense? \*  
Assistance Animal

Is this expected to be an ongoing expense? \*  
Yes

How often does this person pay for this expense? \*  
Monthly

## Medical Expenses

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

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

**My Application**

Application Progress  Applications & Certifications | Hi, Colleen

\* Denotes a required field

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

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.

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

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

**My Application**

Application Progress  Applications & Certifications | Hi, Colleen

\* Denotes a required field

Please tell us about any expenses from medical assistance through a public assistance agency

Include any out-of-pocket expenses from Medical Assistance (MA).

[Add Medical Assistance](#)

No Medical Assistance Added

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

## Final Review and Submission

This step prepares the applicant for reviewing all items in the household's application.

**My Application**

Application Progress  Applications & Certifications | Hi, Colleen

\* Denotes a required field

Final Review & Submission

Your application is almost complete. Please review your application, check it for errors and omissions, and sign the application forms.

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

## Summary

On the **Summary** step, the applicant can make final changes to the application.

**My Application**

Application Progress: 95%

Applications & Certifications | Hi, Colleen

\* Denotes a required field

### Summary

Below is a list of all the information you entered. Please review it for accuracy and completeness.

Members | Income | Assets | Expenses

Add Member

First Name	Last Name	Date of Birth	Edit	Delete
Colleen	Smith	2/1/1985	Edit	Delete
Richard	Smith	5/9/1984	Edit	Delete
Alexander	Smith	6/1/2017	Edit	Delete

Showing 1 to 3 of 3 entries

## Errors

To help identify errors, RENTCafé Affordable Housing compares how the applicant answered the questions to the details the household provided. If the applicant missed required details on a previous step, the applicant must either provide the information or change the answer before moving forward.

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

### 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
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).	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).	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).	Confirm
Richard Smith has no income records. Confirm that this is correct or add an income record.	Add Confirm
You answered "Yes" to the question: "Other Income" However, you did not add details about the associated income(s). Please add the missing income information, or change your answer.	Change Answer Add Other Income

## Documents

On this step, the applicants can upload required documents.

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

Language Selection

Lease Term

Personal Information

Additional Adult Occupants

Pets/Assistance Animals

Special Unit Requirements

Minor Occupants/Member Details

Member Student Status

Household Student Status

Live-In Aide

Household Questions

Anticipated Household Additions

Income

Assets

Child Care Expenses

Disability Assistance Expenses

Medical Expenses

Final Review & Submission

Summary

Errors

**Documents**

### 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.

10 records per page

Learn More	Document	Upload	Scan	View	Delete	Uploaded Date
	Colleen Smith - Colleen Smith - Scan copy of Passport, Birth Certificate, Form I-55 Permanent Resident Card, Form I-94 Arrival-Departure Record, or Other Evidence of Citizenship Status	Upload	Scan			
	Alexander Smith - Alexander Smith - Scan copy of Passport, Birth Certificate, Form I-55 Permanent Resident Card, Form I-94 Arrival-Departure Record, or Other Evidence of Citizenship Status	Upload	Scan			
	Richard Smith - Richard Smith - Scan copy of Passport, Birth Certificate, Form I-55 Permanent Resident Card, Form I-94 Arrival-Departure Record, or Other Evidence of Citizenship Status	Upload	Scan			
	Richard Smith - Office Visits - Doctor's/Dentist - Upload copies of receipts and/or repayment agreement with the institution.	Upload	Scan			
	Richard Smith - Assistance Animal - Auxiliary Apparatus/Assistance Animal - Provide copies of receipts of expenses from an auxiliary apparatus/assistance animal	Upload	Scan			

## Sign and Submit

Signing the application is the applicant’s final step.

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

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 the member’s own set of documents.

**Lease Term**

**Personal Information**

**Additional Adult Occupants**

**Pets/Assistance Animals**

**Special Unit Requirements**

**Minor Occupants/Member Details**

**Member Student Status**

**Household Student Status**

**Live-In Aide**

**Household Questions**

**Anticipated Household Additions**

**Income**

**Assets**

**Child Care Expenses**

**Disability Assistance Expenses**

**Medical Expenses**

**Final Review & Submission**

Summary

Errors

### Sign and Submit

By signing this application, I/we certify the accuracy of the following information. The information submitted is true and correct and I/we authorize management to verify any references I/we have listed. I/we authorize management to access any records pertaining to me/us which may be on file with law enforcement and credit bureau authorities. I/we authorize my/our present and prior landlords to release information regarding my/our tenancy. I/we understand that it is a crime to knowingly provide false information for the purpose of obtaining or maintaining occupancy in, and/or, for the purpose of securing a lower rent in, a subsidized housing development. I/we understand that the penalty for knowingly providing false information is up to five years in prison and/or \$10,000 fine upon conviction. I/we hereby do swear and attest that all of the information above about me/us is true and correct. I/we also understand that all changes in the income of any member of the household as well as any changes in the household composition must be reported to the landlord in writing immediately.

Document	View	Sign
Household Documents for <b>Colleen Smith</b> to Sign	<a href="#">View Document (Unsigned)</a>	<a href="#">Click here to sign</a>
Member Documents for <b>Colleen Smith</b> to Sign	<a href="#">View Document (Unsigned)</a>	<a href="#">Click here to sign</a>
Household Documents for <b>Richard Smith</b> to Sign		<a href="#">Click here to Invite</a>
Member Documents for <b>Richard Smith</b> to Sign		<a href="#">Click here to Invite</a>

Sign Document
(Document 1 of 1) Page 11 of 51

**Required Actions**

[NEXT](#)

Page 11 (2 actions)

Page 12 (2 actions)

Page 13 (2 actions)

Page 16 (2 actions)

Page 18 (2 actions)

Page 30 (2 actions)

Page 49 (2 actions)

Page 50 (2 actions)

### Move-In Application

11 of 12

**SPECIAL UNIT REQUIREMENT(S) QUESTIONNAIRE**

67. **Applicant name** Colleen Smith

68. **Applicant signature** Sign **Date** Date

The following section is optional and is used to help determine eligibility for special accessible housing features. All answers will be verified.

69. **Would you like to provide information to help determine your eligibility for special accessible housing features?**  
 Yes  No

To qualify for an accessible unit, a household member must have a physical impairment that:

- is expected to be of long-continued and indefinite duration
- substantially impedes the person's ability to live independently
- is such that the person's ability to live independently could be improved by more suitable housing conditions

70. **Do you or a household member have a mobility impairment which meets the definitions stated above?**  Yes  No

71. **If yes, list name(s) of family members:**

[Save Progress](#) [JUMP TO NEXT](#)

## 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 move-in applications on the **Move In Dashboard**.

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

### 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:

10 records per page Search:

Name	Property Name	Unit	Status	Request Type	Last Updated	Completed	Preferred Move In	Deposit	Date Submitted		
Smith, Colleen	Skyline Towers		Pending	Standard Tax Credit and HUD Move In	05/19/2021	05/19/2021	05/19/2021				<input type="button" value="🖨️"/> <input type="button" value="🔍"/>



## Compliance Management Dashboard–Move-In Dashboard

Most **Move In Dashboard** tiles involve actions that need to be addressed. These tiles organize tasks and helps prevent team members from overlooking important pending actions.

The **Move-In Dashboard** shows all completed items needing review and further action. You can click a tile to see 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 10:57 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

7

Move In Apps Pending

7

Pending Verify

0

Letters Are Unanswered

7

Pending Compliance Approved

7

Incomplete Corrections Needed

0

Move In Certifications  
Need Applicant Signatures

0

Move In Certifications  
Need Countersignature

Move In Apps Pending

Search:

	Name	Property Name	Unit	Status	Request Type	Last Updated	Completed	Preferred Move In	Deposit	Date Submitted		
	Smith, Colleen	Skyline Towers		Pending	Standard Tax Credit and HUD Move In	05/19/2021	05/19/2021	05/19/2021				
	Tapper, Katherine	Skyline Towers		Pending	Standard Tax Credit and HUD Move In	05/20/2021	05/20/2021	05/20/2021				

## Household Page—Members

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

RENTCafé Affordable Housing has reviewed for completeness all information entered by the applicant at each step in the application process. All applicant 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 in the prospect portal by the applicant. 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 entered by the applicant: the member earning the income, the income type, the applicant-entered annual income, and the verified annual income.

Updated income information does not appear until verification has been completed. If you have not verified an income source, **No** appears in the **Verified** field. After verification, you can determine whether 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 entered by the applicant: the member owning the asset, the asset type, the applicant-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 Affordable Housing will retain and display the original applicant-entered information. During a file review, you can quickly display the information supplied by the applicant 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 applicant: the member incurring the expense, the applicant-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.

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

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

NOTE: This tab does not appear for properties that have only tax credit assistance.

## Household Page–Additional Occupants

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

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

## Household Page–Documents

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

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

The Site Manager user can also upload or scan documents if the applicant is unable to do so.

Application	Members	Incomes	Assets	Expenses	Additional Occupants	<b>Documents</b>	Signed Documents	Errors & Alerts (0)	Notes	Audit Log	Compliance Application
Correspondence		All Verifications									
<b>Print Documents</b>											
You may drag and reorder any of the saved documents below.											
10 records per page						Search: <input type="text"/>					
Document	Document Name	Manager View Only	Send to Voyager	Uploaded Date	Size	Edit	Delete				
Richard Smith - Scan copy of social security card.							<b>Upload</b> <b>Scan</b>				
Optional - Scan other household documents.							<b>Upload</b> <b>Scan</b>				
Colleen Smith - Bank Account - Savings Account - Upload a copy of the most current account statement from the financial institution.							<b>Upload</b> <b>Scan</b>				
Colleen Smith - Bank Account - Checking Account - Scan last 6 months of statements.							<b>Upload</b> <b>Scan</b>				
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	<b>Edit</b>	<b>View</b> <b>Delete</b>				
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	<b>Edit</b>	<b>View</b> <b>Delete</b>				
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	<b>Edit</b>	<b>View</b> <b>Delete</b>				

## 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 needed, the property 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.

Application	Members	Incomes	Assets	Expenses	Additional Occupants	Documents	<b>Signed Documents</b>	Errors & Alerts (0)	Notes																				
Audit Log	Compliance Application	Correspondence	All Verifications																										
<div style="display: flex; justify-content: space-between;"> <span>View All</span> <span>Email Documents</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Document</th> <th>View</th> <th>Sign</th> <th>Counter Sign</th> </tr> </thead> <tbody> <tr> <td>Household Documents for Colleen Smith to Sign</td> <td style="text-align: center;"><a href="#">View Document (Signed)</a></td> <td style="text-align: center;">Signing Complete</td> <td style="text-align: center;"><a href="#">Click here to sign</a></td> </tr> <tr> <td>Member Documents for Colleen Smith to Sign</td> <td style="text-align: center;"><a href="#">View Document (Signed)</a></td> <td style="text-align: center;">Signing Complete</td> <td style="text-align: center;"><a href="#">Click here to sign</a></td> </tr> <tr> <td>Household Documents for Richard Smith to Sign</td> <td style="text-align: center;"><a href="#">View Document (Signed)</a></td> <td style="text-align: center;">Signing Complete</td> <td style="text-align: center;"><a href="#">Click here to sign</a></td> </tr> <tr> <td>Member Documents for Richard Smith to Sign</td> <td style="text-align: center;"><a href="#">View Document (Signed)</a></td> <td style="text-align: center;">Signing Complete</td> <td style="text-align: center;"><a href="#">Click here to sign</a></td> </tr> </tbody> </table>										Document	View	Sign	Counter Sign	Household Documents for Colleen Smith to Sign	<a href="#">View Document (Signed)</a>	Signing Complete	<a href="#">Click here to sign</a>	Member Documents for Colleen Smith to Sign	<a href="#">View Document (Signed)</a>	Signing Complete	<a href="#">Click here to sign</a>	Household Documents for Richard Smith to Sign	<a href="#">View Document (Signed)</a>	Signing Complete	<a href="#">Click here to sign</a>	Member Documents for Richard Smith to Sign	<a href="#">View Document (Signed)</a>	Signing Complete	<a href="#">Click here to sign</a>
Document	View	Sign	Counter Sign																										
Household Documents for Colleen Smith to Sign	<a href="#">View Document (Signed)</a>	Signing Complete	<a href="#">Click here to sign</a>																										
Member Documents for Colleen Smith to Sign	<a href="#">View Document (Signed)</a>	Signing Complete	<a href="#">Click here to sign</a>																										
Household Documents for Richard Smith to Sign	<a href="#">View Document (Signed)</a>	Signing Complete	<a href="#">Click here to sign</a>																										
Member Documents for Richard Smith to Sign	<a href="#">View Document (Signed)</a>	Signing Complete	<a href="#">Click here to sign</a>																										

### Sign Document

Required Actions

NEXT

Page 51 ✔

**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 (555) 555-5555. 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.

Digitally  
✔  
@PropertyManager

SIGN & COMPLETE

## Household Page–Errors & Alerts

The **Errors & Alerts** tab highlights any issues with the application 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	<b>Errors &amp; Alerts (0)</b>	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, 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.



## Household Page–Audit Log

The audit log displays a variety of information about applicant 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 applicant 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 applicant. You can also reset the applicant’s current step in the application process.

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

Application	Members	Incomes	Assets	Expenses	Additional Occupants	Documents	Signed Documents	Errors & Alerts (0)	Notes	Audit Log	<b>Compliance Application</b>
Correspondence All Verifications											
First Name		Last Name									
Colleen		Smith		<a href="#">Compliance Application</a>		<a href="#">Change Current Step</a>					
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 applications remain at the incomplete status for more than a week. You can send an email to all these applicants with an at once. The sent emails will appear on the **Correspondence** tab.

Application	Members	Incomes	Assets	Expenses	Additional Occupants	Documents	Signed Documents	Errors & Alerts (0)	Notes	Audit Log	Compliance Application		
<b>Correspondence</b> All Verifications													
Emails are sent periodically by a process running in the background. Email Status is as of 5/20/2021 7:30 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
No data available in table													





## Verification

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

Before verifying member, income, asset, or expense data, you 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 applicant portal for your applicant to electronically sign. An email is automatically sent alerting the applicant 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 Name: Smith, Colleen (3)	Request Type: Move In Application	Income Limit:   50059 - \$38,800.00
Prospect Code: p0019872	Created Date: 05/19/2021	Voyager Unit Rent: Count not find unit
Property / Unit: Skyline Towers / Not Selected	Current Status: Pending	Total Applicant Entered Income: \$35,105.60
SSN: ***-**-0000	Preferred Move-In Date: 05/19/2021	Total Verified Income: \$0.00
Screening: Not Completed	Language: English	Verifications Complete: 0 of 5

---

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

Correspondence
**All Verifications**

Search:

Member	Relationship	Verification Type	Description	Status	Level	Date	Date Sent			
Colleen Smith	Head of Household	Member		Not Started				<a href="#">View Details</a>	<a href="#">Upload Document</a>	<a href="#">Add Note</a>
Richard Smith	Spouse	Member		Not Started				<a href="#">View Details</a>	<a href="#">Upload Document</a>	<a href="#">Add Note</a>
Alexander Smith	Youth<18	Member		Not Started				<a href="#">View Details</a>	<a href="#">Upload Document</a>	<a href="#">Add Note</a>
Colleen Smith	Head of Household	Income	Roswell Florist	Not Started				<a href="#">View Details</a>	<a href="#">Upload Document</a>	<a href="#">Add Note</a>
Colleen Smith	Head of Household	Income	Mother	Not Started				<a href="#">View Details</a>	<a href="#">Upload Document</a>	<a href="#">Add Note</a>
Colleen Smith	Head of Household	Income	Georgia State	Not Started				<a href="#">View Details</a>	<a href="#">Upload Document</a>	<a href="#">View Verification Docs &amp; Letters</a> <a href="#">Add Note</a>
Colleen Smith	Head of Household	Asset	Wells Fargo	Not Started				<a href="#">View Details</a>	<a href="#">Upload Document</a>	<a href="#">Add Note</a>

### Household Page

**Follow Up Required**

Household Name: Smith, Colleen (3)      Request Type: Move In Application      Income Limit: |

Prospect Code: p0019872      Created Date: 05/19/2021      Voyager Unit Re

Property / Unit: Skyline Towers / Not Selected      Current Status: Pending      Total Applicant E

SSN: \*\*\*-\*\*-0000      Preferred Move-In Date: 05/19/2021      Total Verified Inc

Screening: Not Completed      Language: English      Verifications Cor

Application   Members   Incomes   Assets   Expenses   Additional Occupants   Documents   Signed Documents   Errors & Alerts (0)   Notes   Audit

Correspondence   **All Verifications**

Search:

Member	Relationship	Verification Type	Description	Status	Level	Date	Date Sent
Colleen Smith	Head of Household	Member		Not Started			

View Details   Upload Document   Add Note

- 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

**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 checked="" type="checkbox"/>	Colleen Smith	Member	none	Select an Option	<input type="text"/>		NA		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Colleen Smith	Expense		Select an Option	<input type="text"/>		NA		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Colleen Smith	Asset	Wells Fargo	Select an Option	<input type="text"/>		NA		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Colleen Smith	Asset	Wells Fargo	59assets-Asset Verification Letter 59	<input type="text"/>		NA		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Colleen Smith	Income	Roswell Florist	tcassets-Asset Verification Letter TC	<input type="text"/>		NA		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Colleen Smith	Income	Mother	59banking-Banking Account Verification 59	<input type="text"/>		NA		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Colleen Smith	Income	Georgia State	tcbanking-Banking Account Verification TC	<input type="text"/>		NA		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Richard Smith	Member	none	TCpropown-Real Property Owned TC	<input type="text"/>		NA		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Richard Smith	Member	none	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 message in the top part of the screen.

Verification Details ✕

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 /

### Asset Verification Example

Next, 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 ✕

---

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

[Add New Verification](#)

Add New Verification ✕

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

Total Annual Income

Notes ✎

## Assigning the Apartment

Site Manager displays all apartments currently available in a property, the square footage, number of bedrooms and set-aside if appropriate. Once you have selected an apartment, the income limit will appear and allow you to see if the applicant qualifies for that apartment.

Some organizations prefer that staff select the apartment that an applicant will be offered instead of allowing the applicant to select it. In this circumstance, all applicants will initially be assigned to a waiting unit.

Click the **More** button and select **Change Unit**.

Click **Continue** and select an apartment. For a tax credit applicant, select an apartment with the appropriate set-aside.

The apartment number and income limit for the selected apartment appear on the **Household Page**.

The screenshot shows the 'Household Page' with a dropdown menu open. The menu items include: Submit to Voyager, Save, More, Calculate Rent to Income Ratio, Change Property, Change Status, **Change Unit** (highlighted), 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, and View Income Calculation Worksheet.

The 'Change Unit' dialog box displays the following information:

Floor Plan	Beds	Baths	Square Footage
Horizon	2	2.00	800-1200

Buttons: Close, Continue

The 'Apartment Availability' section shows a table for 'Floor Plan: Horizon' with columns for Program, Annual Income, Income Limit, and % of AMGI.

Program	Annual Income	Income Limit	% of AMGI
50059	\$35,105.60	\$38,800.00	90.48%
Tax Credit	\$35,105.60	\$46,560.00	75.4%

Below this is a table of available apartments with columns: Apartment, Beds, Baths, Sq. Ft., Floor, Adapted, Availability, Set Aside, Unit Type, Subsidy.

Apartment	Beds	Baths	Sq. Ft.	Floor	Adapted	Availability	Set Aside	Unit Type	Subsidy
SKY00	2	2	1200		No	5/6/2021	60%	Horizon	50059, TaxCredit
SKY01	2	2	1200		No	5/6/2021	60%	Horizon	50059, TaxCredit
SKY02	2	2	1200		No	5/6/2021	60%	Horizon	50059, TaxCredit

Buttons: Select (for each row)

The 'Household Page' shows updated information:

- Request Type: Move In Application
- Income Limit: | 50059 - \$38,800.00 | Tax Credit - \$46,560.00
- Voyager Unit Rent: \$1,000.00
- Total Applicant Entered Income: \$35,105.60
- Total Verified Income: \$0.00
- Verifications Complete: 1 of 5

## 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: Colleen Smith

Certification Date: 5/19/2021

Property Name: Skyline Towers

Unit Size: 2 Br

Unit Code: SKY00

Certification Type: Move In

Household Members:							
Member Name	Relationship	Gender	DOB	Age	Disabled	Student	Date Submitted
Colleen Smith	Head	F	2/1/1985	36			7/22/2021
Richard Smith	Spouse	M	5/9/1984	37	X		7/22/2021
Alexander Smith	Youth<18	F	6/1/2017	3			7/22/2021

Income Calculations:								
Job Name	Member Name	Verification Type	Verification Method	Frequency	\$/Period	Number of Periods	Calculated Income	Verified Income
Rozwell Florist	Colleen Smith	Pay Stubs	Third Party Documents	Bi-Weekly	\$1,213.75 Check Amts: \$1,201.00 \$1,341.00 \$1,145.00 \$1,541.00 \$1,123.00 \$1,125.00 \$1,000.00 \$1,234.00 \$9,710.00 / 8 = 26 = \$31,557.50	26.00	\$31,557.50	\$31,557.50
Mother	Colleen Smith	Gross Detail	Tenant Declaration	Monthly	\$75.00	12.00	\$900.00	\$900.00
Georgia State	Colleen Smith	Gross Detail	Third Party Documents	Quarterly	\$750.00	4.00	\$3,000.00	\$3,000.00
<b>Total of all Income Sources</b>							<b>\$35,457</b>	<b>\$35,457</b>

Asset Calculations:					
Member Name	Description	Divest Cost	Market Value	Interest Rate	Annual Income
Colleen Smith	Wells Fargo	\$0.00	Details: \$145.79 + \$177.45 + \$165.34 + \$145.33 + \$133.45 + \$171.21 / 6	Details: \$145.79 @ 0% \$177.45 @ 0% \$165.34 @ 0% \$145.33 @ 0% \$133.45 @ 0% \$171.21 @ 0%	\$0.00
Colleen Smith	Wells Fargo	\$0.00	Details: \$450.00 + \$600.00 + \$500.00 + \$625.00 + \$575.00 + \$470.00 / 6	Details: \$450.00 @ 1% \$600.00 @ 1% \$500.00 @ 1% \$625.00 @ 1% \$575.00 @ 1% \$470.00 @ 1%	\$5.37
		<b>\$0.00</b>	<b>\$693.10</b>		<b>\$5.37</b>

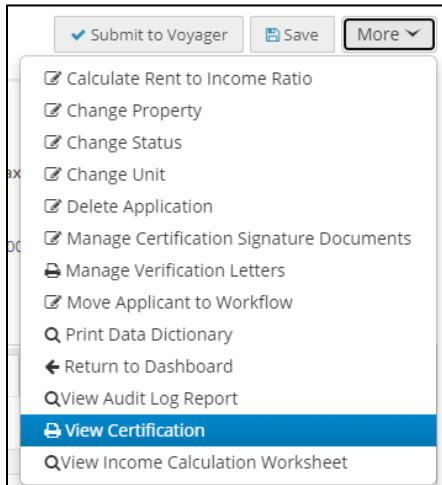
**Total Annual Income:**

Total Mkt Value	Total Sale / Divest Cost	Total Asset Cash Value:	Pass Book Rate:	Total Income From Assets:
\$893.09	\$0.00	\$693.09	0.08%	\$5.37
Total Income:		Total From Assets:		Total Annual Income:
\$35,457.50		+ \$5.37		= \$35,462.87

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.



A screenshot of the 'View Certification' form. The form includes fields for Cert Type\* (Move In Cert), Cert Effective Date\* (5/19/2021), Tax Credit Cert (checked), HUD 50059 Cert (checked), and a question 'Do you want to overwrite the existing certification in Voyager?' (No). On the right side, there are input fields for Tenant Rent (\$0.00), Subsidy Amount (\$0.00), NAHMA Household Type (FA - Family), NAHMA Special Status (D - Disabled), NAHMA Federal Subsidy Type (HUD Project-Based Voucher), and NAHMA Non-Federal Subsidy Type. At the bottom left, the 'View Certification' button is highlighted with a red box, and a 'Cancel' button is next to it.

A screenshot of a 'TENANT INCOME CERTIFICATION' form. The form is divided into several sections: PART I. DEVELOPMENT DATA, PART II. HOUSEHOLD COMPOSITION, PART III. GROSS ANNUAL INCOME (USE ANNUAL AMOUNTS), and PART IV. INCOME FROM ASSETS. It includes tables for household members and income sources, and a 'TOTALS' section at the bottom. The form is titled 'TENANT INCOME CERTIFICATION' and includes a date of 05/19/2021.

MI #	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	Smith	Colleen	H	02/01/1985	N	0000
2	Smith	Richard	S	05/09/1984	N	1111
3	Smith	Alexander	C	06/01/2017	N	9999
4						
5						
6						
7						
8						

MI #	(A) Employment or Wages	(B) Social Security Payments	(C) Public Assistance	(D) Other Income
1	31,537.50	0.00	0.00	3,990.00
TOTALS	\$ 31,537.50	\$ 0.00	\$ 0.00	\$ 3,990.00

MI #	(I) Asset Type	(II) Cash Value of Asset	(III) Annual Income from Asset
1	Wells Fargo	150.43	0.00
2	Wells Fargo	526.67	5.21
TOTALS		\$ 677.10	\$ 5.21

Enter Column (II) Total: \$ 677.10

Enter the greater of the total of Column (I) or (II) reported income: TOTAL INCOME FROM ASSETS (K) \$ 5.21

(L) Total Annual Household Income from All Sources [Add (E) + (K)] \$ 35,602.71

## Submission to Voyager

When the verification process is complete and the applicant is eligible for the program and selected apartment, click **Submit to Voyager**. RENTCafé pushes all information gathered and verified to Voyager and creates the household's certification in Voyager.

Household Page Submit to Voyager Save More

Household Name: Smith, Colleen (3)	Request Type: Move In Application	Income Limit:   \$0059 - \$38,800.00   Tax Credit - \$46,560.00
Prospect Code: p0019872	Created Date: 05/19/2021	Voyager Unit Rent: \$1,000.00
Property / Unit: Skyline Towers / SKY00 (2 Bedrooms)	Current Status: Pending	Total Applicant Entered Income: \$35,105.60
SSN: ****-**-0000	Preferred Move-In Date: 05/19/2021	Total Verified Income: \$0.00
Screening: Not Completed	Language: English	

Submit to Voyager X

Cert Type* Move In Cert	Tenant Rent \$0.00
Cert Effective Date* 5/19/2021	Subsidy Amount \$0.00
<input checked="" type="checkbox"/> Tax Credit Cert	NAHMA Household Type FA - Family
<input checked="" type="checkbox"/> HUD 50059 Cert	NAHMA Special Status D - Disabled
	NAHMA Federal Subsidy Type HUD Project-Based Voucher (
	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

**Follow Up Required**

Household Name: Smith, Colleen (3)	Request Type: Move In Application	Income Limit:   \$0059 - \$38,800.00   Tax Credit - \$46,560.00
Prospect Code: p0019872	Created Date: 05/19/2021	Voyager Unit Rent: \$1,000.00
Property / Unit: Skyline Towers / SKY00 (2 Bedrooms)	Current Status: Submitted	Total Applicant Entered Income: \$35,105.60
SSN: ****-**-0000	Preferred Move-In Date: 05/19/2021	Total Verified Income: \$35,781.37
Screening: Not Completed	Language: English	Verifications Complete: 5 of 5

Resident Functions Data Reports

First Name	Colleen	Resident ID	t0019872
Middle Name		Property	skyline
Last Name	Smith	Unit	SKY00
Address	45 Main St	Prospect	p0019872
		Status	Future
City State	Roswell GA	Legal	
Zip	30009		

Edit Close Help

Affordable Lease Info Deposit Info Lease Charges Late Fees & Accounts

50059 Data							
Cert Type	Effective Date	Contract Rent	TTP	Util Allow.	Tenant Rent	HAP	Edit
MI Print	05/19/2021	1,000	599	70	529	471	Edit

Tax Credit Data							
Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
MI Print	05/19/2021	1,164	599	70	529	471	Edit

50059  Subsidy Provider

Tax Credit  Do not apply rent charges



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

Once the applicant 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.

The screenshot shows the 'Household Page' interface. At the top right, there are buttons for 'Resubmit to Voyager', 'Resubmit Documents to Voyager', 'Save', and a 'More' dropdown menu. The 'More' menu is open, showing various options. The option 'Manage Certification Signature Documents' is highlighted in blue. Other options include 'Calculate Rent to Income Ratio', 'Change Property', 'Change Status', 'Change Unit', 'Delete Application', 'Manage Verification Letters', 'Move Applicant to Workflow', 'Print Data Dictionary', 'Return to Dashboard', 'View Audit Log Report', 'View Certification', and 'View Income Calculation Worksheet'.

Manage Compliance Documents						
TIC Signing						
	Visibility to User	Re-Send Certification Invitation E-Mail	Counter Sign	Send Certification to Voyager	View Certification	TIC to Use
TIC Effective 5/19/2021	<div style="border: 2px solid red; padding: 5px;">                     Show TIC To User  <input checked="" type="checkbox"/> Send email to user?                 </div>	N/A	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	Send Certification to Voyager	View Certification	TIC to Use
50059 Effective 5/19/2021	<div style="border: 2px solid red; padding: 5px;">                     Show 50059 To User  <input checked="" type="checkbox"/> Send email to user?                 </div>	N/A	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: Move In Application
- 👤 Status: Submitted
- 👤 Last Update Date: 5/3/2021
- 👤 Created Date: 4/30/2021

Submitted

50059 Certification

Name	Status	Action
Julia Caldwell	Not Signed	<a href="#" style="background-color: #ccc; padding: 5px 10px;">Sign</a>

Sign Document

Required Actions

[NEXT](#)

Page 1 (2 actions)

(Document 1 of 1) 🔍 📄 ⏪ ⏩

10/09/2019 TENANT INCOME CERTIFICATION

Initial Certification  
  Recertification  
  Other

**PART I. DEVELOPMENT DATA**  
 Property Name: Skyline Towers    County: \_\_\_\_\_    BIN #: 9000000  
 Address: 500 Colonial Center Pkwy, Roswell, GA 30076    Unit Number: SKY06    #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	Goodwin	Sam	H	06/05/1982	N	3333
2						
3						
4						
5						
6						
7						
8						

**PART III. GROSS ANNUAL INCOME (USE ANNUAL AMOUNTS)**

Effective Date: 09/15/2021

Move-in Date: 09/15/2021 (MM/DD/YYYY)

### 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	<a href="#">Send TIC To Voyager</a>	<a href="#">View TIC</a>	National TIC	<a href="#">Delete Signature Documents</a>

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	<a href="#">Send 50059 to Voyager</a>	<a href="#">View 50059</a>	N/A	<a href="#">Delete Signature Documents</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	<a href="#">Send TIC To Voyager</a>	<a href="#">View TIC</a>	National TIC	<a href="#">Delete Signature Documents</a>

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	<a href="#">Send 50059 to Voyager</a>	<a href="#">View 50059</a>	N/A	<a href="#">Delete Signature Documents</a>

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## Lease Generation and Signing

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

On the **Leasing Dashboard**, find the applicant. Click the applicant’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 applicant for signature, click **Finalize and Send Signature Request**.

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

The screenshot shows the 'Leasing Management' dashboard. At the top, there are filters for PROPERTIES (1), 20 units, 27 days, PROSPECT, and STATUS. Below the filters are six summary cards, each with a '0' and a label: 'Application Needs Approval', 'Lease Needs Finalization', 'Lease Needs Signatures', 'Lease Needs Countersignatures', 'Document Needs Signatures', and 'Document Needs Countersignatures'. A table below shows a list of applicants with columns for Name, Property, Additional Occupants, Status, Alerts, and Actions. The first row is for David Thompson, with a red box around his name. The status for David Thompson is 'Approved'.

The screenshot shows the 'Lease Information' page for David Thompson. It includes a 'Pending Lease Execution' section with details like 'Contacted: 7/27/2021', 'Applied: 7/27/2021', 'Approved: 7/27/2021', 'Move in Date: 10/1/2021', and 'Agent: Property Website'. There is also an 'Apartment # SKY07' section with details like 'Details: 2bd/2.0ba | 1200 Sq.Ft.', 'Rent: \$1,000.00/mo', and 'Address: Skyline Towers, 500 Colonial Center Pkwy, Roswell, GA 30076'. At the bottom, there is a 'Signature Documents: Pending Generation' section with a progress bar showing 'Pending Generation (1)', 'Not Started (0)', 'In Progress (0)', 'Pending Countersign (0)', and 'Completed (0)'. A 'Generate' button is highlighted with a red box.

The screenshot shows a confirmation dialog box from sitemanager.rentcafe.com. The text reads: 'Are you sure you want to Generate the document?'. There are two buttons: 'OK' (highlighted with a blue box) and 'Cancel'.

**Signature Documents: Pending Generation** Pending Generation (1) Not Started (0) In Progress (0) Pending Countersign (0) Completed (0)

Lease Document | 7/27/2021 | View | Download | Print  
David Thompson


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 prospect until you click on Finalize & Send Signature Request button.

Hi, David

## Applications & Certifications



**Skyline Towers**  
500 Colonial Center Pkwy  
Roswell, GA 30076

**Account Information**

- Type: Move In Application
- Status: Submitted
- Last Update Date: 7/27/2021
- Created Date: 7/27/2021

Submitted

### Lease Documents to Sign

#### Electronic Signature

- After you (and your roommates) have completed the online electronic signature process (ySignature), the leasing staff at the property will countersign the lease and notify you when the lease has been fully executed.

Your lease is now ready for the applicants below to sign electronically.

<b>Lease Document</b>	<b>David Thompson</b> (Primary)	<b>Sign</b>	View   Download   Print
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**Signature Documents: Pending Countersign** Pending Generation (0) Not Started (0) In Progress (0) **Pending Countersign (1)** Completed (0)

Lease Document | 7/27/2021 | View | Download | Print  
David Thompson 7/27/2021 4:38:04 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** | Sign on behalf of another leasing agent

**Signature Documents: Completed** Pending Generation (0) Not Started (0) In Progress (0) Pending Countersign (0) **Completed (1)**

Lease Document | 7/27/2021 | View | Download | Print  
David Thompson 7/27/2021 4:38:04 PM