

# Yardi Voyager Affordable Housing *LIHTC Waiting List Training Guide*



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## Documentation and Online Help

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## Document Changes

The following table lists the plug-in versions documented in each manual revision. To determine which plug-in versions you use, select **Administration > About**. If a manual documents multiple plug-ins, use the manual revision associated with the most recent plug-in version you use.

A number following the revision letter indicates changes since the previous revision are non-substantive: style, pagination, and so on. Thus, revision a.1 contains the same substantive material as revision a.

Publication Date	Document Revision	Newly Documented Software	Other Substantive Changes
15 November 2018	a.1		
18 April 2018	a	Affordable Plug-in 7.7 Affordable Reports Plug-in 7.6	

# Contents

<b>Introduction .....</b>	<b>v</b>
About Yardi Voyager Affordable Housing .....	v
About the Documentation .....	v
Notes.....	vi
 <b>Chapter 1: LIHTC Property Waiting List Applications .....</b>	 <b>1</b>
Introduction to LIHTC Property Waiting List Applications .....	1
Adding Prospects to LIHTC Property Waiting Lists.....	2
Adding Residents to LIHTC Waiting Lists .....	7
Documenting Waiting List Contact Events for Prospects .....	13
Documenting Waiting List Contact Events for Residents .....	15
Conclusion and Exercises .....	17
 <b>Chapter 2: LIHTC Property Waiting List Application Management .....</b>	 <b>18</b>
Introduction to LIHTC Waiting List Application Management.....	18
Moving Households to the Bottom of a Waiting List .....	19
Rejecting Applicants on a Waiting List .....	21
Denying Waiting List Applicants Assigned to Units .....	23
Removing Households from a Waiting List .....	25
Conclusion and Exercises .....	28
 <b>Chapter 3: LIHTC Property Waiting List Management.....</b>	 <b>29</b>
Introduction to LIHTC Waiting List Management.....	29
Reviewing Waiting List for LIHTC Properties .....	30
Reviewing and Updating Waiting List Information for Prospects .....	32
Reviewing and Updating Waiting List Information for Residents .....	33
Generating LIHTC Property Waiting List Reports .....	34
Conclusion and Exercises .....	36

# Introduction

## About Yardi Voyager Affordable Housing

With Yardi Voyager Affordable Housing, you can manage properties that operate under Low Income Tax Credit (LITHTC), HOME, Rural Development Section 515, HUD project-based housing, or a combination of these programs. Yardi Voyager Affordable Housing integrates compliance, accounting, and property management within a single system. This manual includes information specific to Affordable Housing SaaS Affordable Plug-In 2.

## About the Documentation

This guide furnishes training lessons for beginning Voyager Affordable Housing users. The lessons are designed to be completed sequentially. Completing the exercises at the end of each lesson can help to reinforce your knowledge.

Your system administrator customizes Yardi Voyager Affordable Housing and manages the security settings. Customization and security settings affect the appearance of Yardi Voyager Affordable Housing and determine the options that are available to users. Most screens and menu paths described in this document are for a standard implementation with the least restrictive security settings. The screens and descriptions may not match those that you see when you use Yardi Voyager Affordable Housing. This document does not typically describe fields like **Name** or **Unit #**, for which the purpose is self-evident. Unless otherwise indicated, menu paths are for the side menu.

Yardi Voyager Affordable Housing relies on the Yardi Voyager core and residential systems. For information about these systems, see the Yardi Voyager core and residential guides.

You can find the latest documentation on Yardi [Client Central](https://clientcentral.yardi.com):

<https://clientcentral.yardi.com>

If you need help determining your logon name and password contact Yardi technical support.

## Notes



An information note provides background information. For example, it may explain how changes made in one screen affect data that appears in another screen.



A caution note explains how to avoid a potential problem, or indicates that a process will cause irreversible changes to your data.



A tip describes a way to get more from your software. For example, it may explain an alternative way to perform a task.

# CHAPTER 1

## LIHTC Property Waiting List Applications

### In this lesson:

Introduction to LIHTC Property Waiting List Applications .....	1
Adding Prospects to LIHTC Property Waiting Lists .....	2
Adding Residents to LIHTC Waiting Lists .....	7
Documenting Waiting List Contact Events for Prospects .....	13
Documenting Waiting List Contact Events for Residents .....	15
Conclusion and Exercises .....	17

This lesson explains how to add applicants to an LIHTC property waiting list.

### Introduction to LIHTC Property Waiting List Applications

LIHTC properties are frequently fully occupied. If no units are available that meet a household's needs and the property's waiting list is accepting applications, you can add prospects and residents to the waiting list.

LIHTC regulations require detailed record-keeping for households on waiting lists. Voyager keeps a contact log for each household on a waiting list. Documenting every contact event that you have with a household is an important responsibility.



The **Waiting List** screen contains several fields for adding comments or remarks. Follow direction of management in your organization before adding remarks or comments. Ensure that your comments, notes, and remarks comply with fair housing laws.

In this lesson, you will learn how to complete the following tasks:

- 1 Add a prospect to an LIHTC property's waiting list.
- 2 Add a resident to an LIHTC property's waiting list.
- 3 Document a contact event for a household on the waiting list.

## Adding Prospects to LIHTC Property Waiting Lists

LIHTC properties may be frequently fully-occupied. When no units are available, a waiting list is set up for the property, and your security permissions give you access the waiting list, you can add prospects to the waiting list. If you have access to waiting lists for several properties, you can also include the prospect on those lists.



In this lesson, you will add a prospect to a waiting list from the **Preferences** leasing step. You can also add the prospect to the property's waiting from any leasing step of the leasing workflow.

### To add a prospect to an LIHTC property's waiting list

- 1 On the **Community Manager Dashboard** screen, select the property.
- 2 Add a prospect guest card for the household head and then click **Next** to advance to the **Preferences** leasing step.
- 3 Click the **Waiting List** button, located above the **Preferences** tab on the **Prospect Guest Card** screen.

The screenshot shows the 'Prospect Guest Card' interface. At the top, there's a tab labeled 'Other Data'. Below it, the form is divided into several sections. On the left, there are input fields for 'First Name' (Kim), 'Last Name' (Hernandez), 'Address' (42 Previous Street), 'City State Zip' (Atown, SC, 49400), 'Tel# Office-Home' ((843) 554-5676), 'Cell# - Fax#' ((843) 687-9564), 'DOB - DL#/State', 'Email' (knh@email.com), and 'Notes'. On the right, there are fields for 'Status' (Prospect), 'Code' (p0003087), 'Property' (kn125t), 'First Contact' (Call), 'Agent' (Fred Flanders), 'Source' (Referral), 'Result', and 'Date' (01/26/2018). To the right of these fields is a 'Leasing Steps' sidebar with links: Guest Card, Preferences, Occupants, Select Unit, Rental Options, Concessions, Application Form, Application Charges, and Application Status. Below the main form area, there are buttons for 'Contacts', 'Waiting List', 'Previous', and 'Next'. The 'Waiting List' button is highlighted with a red box and a red arrow pointing to it from the label 'Waiting List button' below the screenshot. Below the buttons, there's a 'Preferences' section with a blue header. Under 'Preferences', there are input fields for 'Expected Move In', 'Bedrooms' (0), and 'Desired Rent' (0). To the right of these is an 'Amenity Preferences' section with a 'Select' button and an 'Amenity' field.

Preferences

Waiting List button





The **Waiting List** screen appears. The **Contact Log** tab appears in the bottom part of the screen.

The screenshot shows the 'Waiting List' screen. At the top, there's a header 'Waiting List'. Below it, a form contains personal and contact details for 'Kim N. Hernandez' at '42 Previous Street, Unit 203, Atown, SC 49400'. It includes fields for 'First Choice', 'Second Choice', 'Third Choice', 'Household Size' (0), and 'Annual Income' (0.00). A 'Comment' field is also present. To the right, a box titled 'Property Waiting Lists For This Prospect' shows 'kn125t'. Below the form are 'Save' and 'Help' buttons. A tabbed interface at the bottom has 'Contact Log' selected, with other tabs for 'Tax Credit', 'Demographics', and 'Preferences'. The 'Contact Log' section includes fields for 'Contact Date', 'Contact Time', 'Type of Contact', and a 'Comment' field, with an 'Add to Contact Log' button. At the very bottom is a table with columns: Edit, Date, Time, Type of Contact, Comment, Status, Added By, and Edited By.

**4** Add the following information in the top part of the **Waiting List** screen.

<b>First Choice</b>	Select the unit size, in terms of the number of bedrooms, that the prospect prefers.
<b>Second Choice</b>	If units of more than one size exist in the property and the prospect has a second choice for the number of bedrooms, select the prospect's second choice.
<b>Third Choice</b>	If units of several sizes exist in the property and the prospect has a third choice for the number of bedrooms, select the prospect's third choice.
<b>Household Size</b>	Type the number of people in the household.
<b>Annual Income</b>	If the household provides annual income information, type the annual income amount.
<b>Comment</b>	Type initial remarks, if needed.  <b>NOTE</b> Ensure that your comments, notes, and remarks comply with fair housing laws. Follow the policies of management in your organization before adding comments.

5 On the **Contact Log** tab, add the following Information.

<b>Contact Date</b>	Type the date on which you are adding the prospect to the waiting list, or click the <b>Calendar</b> button  and select the date.
<b>Contact Time</b>	Type the time at which you are adding the prospect to the waiting list, or click the <b>Clock</b> button  and select the time.
<b>Type of Contact</b>	Select <b>New Application</b> .
<b>Comment</b>	Type notes or remarks, if needed.  <b>NOTE</b> Ensure that your comments, notes, and remarks comply with fair housing laws. Follow the policies of management in your organization before adding comments.

**Waiting List**

Name: Kim N. Hernandez  
 Address: 42 Previous Street  
 Unit 203  
 City, State, Zip: Atown, SC 49400  
 Office Telephone: (843) 554-5676  
 Home Phone: (843) 512-3432

First Choice: 2 BR  
 Second Choice: 1 BR  
 Third Choice:   
 Household Size: 3  
 Annual Income: 21,500.00

**Property Waiting Lists For This Prospect**  
 kn125t

**Contact Log** | Tax Credit | Demographics | Preferences

**New Application** (points to Type of Contact)

Contact Date: 01/26/2018  
 Contact Time: 9:00 AM  
 Type of Contact: New Application

Comment:   
 Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
------	------	------	-----------------	---------	--------	----------	-----------

6 Click the **Tax Credit** tab and add the following information, if needed.

<b>Estimated Percent of AMGI</b>	Type the percentage of the area median gross income that you estimate is appropriate for the household.
<b>Special Needs</b>	If a special needs list has been set up for the state in which the property is located and the household has one or more special needs, select the household's most important special need.  <b>NOTE</b> The two-character state code recorded on the <b>Property</b> screen for the subject property determines the special needs that appear on this list.

**Waiting List**

Name	Kim N. Hernandez	First Choice	2 BR
Address	42 Previous Street	Second Choice	1 BR
	Unit 203	Third Choice	
City, State, Zip	Atown, SC 49400	Household Size	3
Office Telephone	(843) 554-5676	Annual Income	21,500.00
Home Phone	(843) 512-3432	Comment	

[Save](#) [Help](#)

**Property Waiting Lists For This Prospect**  
kn125t

**Tax Credit tab**

Estimated Percent of AMGI 50 %  
Special Needs

**Contact Log** **Tax Credit** **Demographics** **Preferences**

**7** Click the **Demographics** tab and add the following Information.

<b>Gender</b>	Select <b>Male</b> or <b>Female</b> .  If you are not required to specify gender for your waiting list and the person does not want to identify with a specific gender, select <b>Declined to Report</b> .
<b>Ethnicity</b>	Select the <b>1-Hispanic</b> or <b>2-Non-Hispanic</b> .  If you are not required to specify ethnicity for your waiting list and the person does not want to disclose whether the person is Hispanic or non-Hispanic, select <b>Declined to Report</b> .
<b>Race (Choose all that apply)</b>	Select one or more racial categories.  If you are not required to specify race for your waiting list and the person does not want to disclose racial background, select <b>Declined to Report</b> .

**Waiting List**

Name	Kim N. Hernandez	First Choice	2 BR
Address	42 Previous Street	Second Choice	1 BR
	Unit 203	Third Choice	
City, State, Zip	Atown, SC 49400	Household Size	3
Office Telephone	(843) 554-5676	Annual Income	21,500.00
Home Phone	(843) 512-3432	Comment	

[Save](#) [Help](#)

**Property Waiting Lists For This Prospect**  
kn125t

**Demographics tab**

Gender Female  
Ethnicity 1-Hispanic

**Race (Choose all that apply)**  
☒ White
 ☐ Black
 ☐ Native American
 ☐ Asian
 ☐ Pacific Islander
 ☐ Other
 ☐ Declined to Report

**Contact Log** **Tax Credit** **Demographics** **Preferences**

**8** If the waiting list is set up with preferences and the prospect qualifies for preferences, click the **Preferences** tab.

## 9 Select all appropriate preferences..



Preferences influence the order in which a household appears on a waiting list.

**Waiting List**

Name: Kim N. Hernandez  
 Address: 42 Previous Street  
 Unit 203  
 City, State, Zip: Atown, SC 49400  
 Office Telephone: (843) 554-5676  
 Home Phone: (843) 512-3432

First Choice: 2 BR  
 Second Choice: 1 BR  
 Third Choice:   
 Household Size: 3  
 Annual Income: 21,500.00  
 Comment:

[Save](#) [Help](#)

**Property Waiting Lists For This Prospect**  
[kn125t](#)

**Preferences tab**

Has Preference?	Code	Preference Description	Type
<input checked="" type="checkbox"/>	disabled	Disabled	Local
<input type="checkbox"/>	homeless	Homeless family	
<input type="checkbox"/>	transfer	Transfer	
<input type="checkbox"/>	veteran	USA Veteran	

**Selected preference**

**10** Click **Save**. You have added the prospect to the waiting list. The **Position** tab appears in the bottom part of the screen.

**11** Click the **Position** tab and review the applicant's position on the waiting list, by the applicant's choices for bedroom size.

**Waiting List**

Name: Kim N. Hernandez  
 Address: 42 Previous Street  
 Unit 203  
 City, State, Zip: Atown, SC 49400  
 Office Telephone: (843) 554-5676  
 Home Phone: (843) 512-3432

First Choice: 2 BR  
 Second Choice: 1 BR  
 Third Choice:   
 Household Size: 3  
 Annual Income: 21,500.00  
 Comment:

[Save](#) [Help](#)

**Property Waiting Lists For This Prospect**  
[kn125t](#)

**Position tab**

First Choice	
Bedroom Size	2
Rank	4

Second Choice	
Bedroom Size	1
Rank	5

**12** Close the **Waiting List** screen. You have added the prospect to the waiting list.

## Adding Residents to LIHTC Waiting Lists

When a change in a resident household's size or circumstances result in a need for a different unit and no units meeting the household's needs are available, you can add the household to the property's waiting list.

### To add a resident household to a HUD 50059 property waiting list

- 1 On the **Community Manager Dashboard** screen, select the property.
- 2 Perform a person search to find the household head.
  - a Click the **Person Search** tab and perform a search to find household head.
  - b On the **Person Search** tab, click the person's name.

The **Resident** screen appears. The household's prospect code appears in the top part of the screen, on the right.

Resident

Functions

Data

Reports

First Name

William

MI

M

Last Name

Everton

Address

42 Main Street 4A

City/State/Zip

Atown

SC

49400

Email

wme@eamil.com

Alt. Email

Office

(843) 665-6767

Home

(843) 377-6789

FAX

Resident ID

t0002591

Property

kn125t

Unit

4A

Prospect

p0003081

Status

Current

Legal

N/A

Payment Method

Any

NSF Count

0

Late Count

0

Edit

Close

Help

Affordable

Lease Info

Deposit Info

Lease Charges

Other Info

Personal Info

Tax Credit Data

Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
AR <a href="#">Print</a>	12/01/2017	1,360	1,055	45	1,010	0	<a href="#">View</a>
MI <a href="#">Print</a>	12/15/2016	822	822	50	772	0	<a href="#">View</a>

Tax Credit

☒

Subsidy Provider

3 From the **Data** menu in the top part of the screen, click **Affordable Waiting List**.

### Affordable Waiting List

**Resident** Functions Data Reports

First Name: William MI M  
 Last Name: Everton  
 Address: 42 Main Street 4A  
 City/State/Zip: Atown SC 49400  
 Email: [wme@eamil.com](mailto:wme@eamil.com)  
 Alt. Email:  
 Office: (843) 665-6767  
 Home: (843) 377-6789  
 FAX:

Attachment  
 Credit Card Setup  
 EFT Setup  
 Email  
 Inspection  
 Memo  
 New WO  
 Recurring Payment Setup  
 Lease Charges  
 Roommates (1)  
 Manage Rentable Items  
 Resident History

Workflow  
 Billing & Payments Interface  
 Collections Interface  
 Bonded  
 Billing & Payments Interface  
 Additional Care Information  
 CRRM Lease Renewal  
 Transfer Preferences  
 Former Tenant/Collections Data  
 Affordable Waiting List  
 50059 Certification Stack  
 50059 History

Affordable Lease Info Deposit Info Lease Charges Other Info Personal Info

Tax Credit Data							
Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
<a href="#">AR</a> <a href="#">Print</a>	12/01/2017	1,360	1,055	45	1,010	0	<a href="#">View</a>
<a href="#">MI</a> <a href="#">Print</a>	12/15/2016	822	822	50	772	0	<a href="#">View</a>

Tax Credit ☒ Subsidy Provider

The **Waiting List** screen appears. the **Contact Log** tab appears in the bottom part of the screen.

- If the household had not been previously on the waiting list, the **Waiting List** screen is empty.
- If the household had been on the waiting list as a prospect, the household's contact history appears on the **Contact Log** tab. The selections when the household was most recently on the list appears in the top part of the screen.

Waiting List

Name

William M. Everton

Address

20 Oldtown Avenue

Unit 50

City, State, Zip

Atown, SC 49400

Office Telephone

Home Phone

(854) 377-6789

Save

Help

First Choice

1 BR

Second Choice

2 BR

Third Choice

Household Size

2

Annual Income

10,400.00

Comment

Property Waiting Lists For This Prospect

kn125t

Contact Log

Tax Credit

Demographics

Preferences

Position

Contact Date

Contact Time

Type of Contact

Comment



Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	12/15/2016	11:00 AM	Moved In		Moved In	karinn	karinn
	12/15/2016	8:00 PM	Unit Accepted	Unit has special features for disabled, needed by HOH	On List	karinn	karinn
	12/15/2016	9:00 AM	Application Approved	Unit has special features for disabled, needed by HOH	On List	karinn	karinn
	10/15/2016	10:45 AM	New Application	Applied as William M. Everton. 1st Choice-1 BR, 2nd Choice-2 BR	On List	karinn	karinn

- 4 Review the following information in the top part of the **Waiting List** screen, adding new information and making needed changes.

<b>First Choice</b>	Select the unit size, in terms of the number of bedrooms, that the prospect prefers.
<b>Second Choice</b>	If units of more one size exist in the property and the prospect has a second choice for number of bedrooms, select the prospect's second choice.
<b>Third Choice</b>	If units of several sizes exist in the property and the prospect has a third choice for number of bedrooms, select the prospect's third choice.
<b>Household Size</b>	Type the number of people in the household.
<b>Annual Income</b>	Type the amount of the household's annual income.
<b>Comment</b>	Type initial remarks, if needed.  <b>NOTE</b> Ensure that your comments, notes, and remarks comply with fair housing laws. Follow direction of management in your organization when adding comments.

5 On the **Contact Log** tab, add the following Information.

<b>Contact Date</b>	Type the date on which you are adding the prospect to the waiting list, or click the <b>Calendar</b> button  and select the date.
<b>Contact Time</b>	Type the time that you are adding the prospect to the waiting list, or click the <b>Clock</b> button  and select the time.
<b>Type of Contact</b>	Select <b>New Application</b> .
<b>Comment</b>	Type notes or remarks, if needed.  <b>NOTE</b> Ensure that your comments, notes, and remarks comply with fair housing laws. Follow direction of management in your organization when adding comments.

Waiting List

Name

William M. Everton

Address

20 Oldtown Avenue

Unit 50

City, State, Zip

Atown, SC 49400

Office Telephone

Home Phone

(854) 377-6789

Save

Help

First Choice

2 BR

Second Choice

Third Choice


Household Size

2

Annual Income

10,400.00

Comment



Property Waiting Lists For This Prospect

kn125t

Contact Log

Tax Credit


Demographics

Preferences

Position


Contact Date

02/27/2018



Contact Time

11:00 AM








Type of Contact

New Application

Comment

Add to Contact Log



Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	12/15/2016	11:00 AM	Moved In		Moved In	karinn	karinn
	12/15/2016	8:00 PM	Unit Accepted	Unit has special features for disabled, needed by HOH	On List	karinn	karinn
	12/15/2016	9:00 AM	Application Approved	Unit has special features for disabled, needed by HOH	On List	karinn	karinn
	10/15/2016	10:45 AM	New Application	Applied as William M. Everton. 1st Choice-1 BR, 2nd Choice-2 BR	On List	karinn	karinn



- 6 Click the **Tax Credit** tab and add or update the information, as needed.

Waiting List			
Name	Joshua L. Lundeen	First Choice	2 BR
Address	45 Previous Street	Second Choice	
		Third Choice	
City, State, Zip	Atown, SC 49400	Household Size	1
Office Telephone		Annual Income	24,950.00
Home Phone	(843) 557-6231	Comment	
<input type="button" value="Save"/> <input type="button" value="Help"/>			
<div> <div>Contact Log</div> <div>Tax Credit</div> <div>Demographics</div> <div>Preferences</div> <div>Position</div> </div>			
<div> <div>Estimated Percent of AMGI</div> <div>50</div> <div>%</div> </div>			
<div> <div>Special Needs</div> <div></div> </div>			

- 7 If the household's demographics are new or have changed, add or update the information on the **Demographics** tab.

Waiting List			
Name	William M. Everton	First Choice	2 BR
Address	20 Oldtown Avenue	Second Choice	
	Unit 50	Third Choice	
City, State, Zip	Atown, SC 49400	Household Size	2
Office Telephone		Annual Income	10,400.00
Home Phone	(854) 377-6789	Comment	
<input type="button" value="Save"/> <input type="button" value="Help"/>			
<div> <div>Contact Log</div> <div>Tax Credit</div> <div>Demographics</div> <div>Preferences</div> <div>Position</div> </div>			
<div> <div>Gender</div> <div>Male</div> </div>			
<div> <div>Ethnicity</div> <div>2-Non-Hispanic</div> </div>			
<div> <div>Race (Choose all that apply)</div> <div> <input type="checkbox"/> White <input checked="" type="checkbox"/> Black <input type="checkbox"/> Native American <input type="checkbox"/> Asian <input type="checkbox"/> Pacific Islander <input type="checkbox"/> Other <input type="checkbox"/> Declined to Report </div> </div>			

- 8 If a **Preferences** tab appears on the screen, click the **Preferences** tab and add or update the information, as needed.

**Waiting List**

Name: William M. Everton  
 Address: 20 Oldtown Avenue  
 Unit 50  
 City, State, Zip: Atown, SC 49400  
 Office Telephone:  
 Home Phone: (854) 377-6789

First Choice: 2 BR  
 Second Choice:  
 Third Choice:  
 Household Size: 2  
 Annual Income: 10,400.00  
 Comment:

[Save](#) [Help](#)

**Property Waiting Lists For This Prospect**  
[kn125t](#)

**Contact Log** | **Tax Credit** | **Demographics** | **Preferences** | **Position**

Has Preference?	Code	Preference Description	Type
<input checked="" type="checkbox"/>	disabled	Disabled	Local
<input type="checkbox"/>	homeless	Homeless family	
<input type="checkbox"/>	transfer	Transfer	
<input type="checkbox"/>	veteran	USA Veteran	

- 9 When you have added the needed information, click **Save**. The resident is now on the waiting list.

**Waiting List**

Name: William M. Everton  
 Address: 20 Oldtown Avenue  
 Unit 50  
 City, State, Zip: Atown, SC 49400  
 Office Telephone:  
 Home Phone: (854) 377-6789

First Choice: 2 BR  
 Second Choice:  
 Third Choice:  
 Household Size: 2  
 Annual Income: 10,400.00  
 Comment:

[Save](#) [Help](#)

**Property Waiting Lists For This Prospect**  
[kn125t](#)

**Contact Log** | **Tax Credit** | **Demographics** | **Preferences** | **Position**

Contact Date:    
 Contact Time:    
 Type of Contact:

Comment:   
[Add to Contact Log](#)

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	02/27/2018	11:00 AM	New Application	1st Choice-2 BR	On List	karinn	karinn
	12/15/2016	11:00 AM	Moved In		Moved In	karinn	karinn
	12/15/2016	8:00 PM	Unit Accepted	Unit has special features for disabled, needed by HOH	On List	karinn	karinn
	12/15/2016	9:00 AM	Application Approved	Unit has special features for disabled, needed by HOH	On List	karinn	karinn
	10/15/2016	10:45 AM	New Application	Applied as William M. Everton. 1st Choice-1 BR, 2nd Choice-2 BR	On List	karinn	karinn

New waiting list application

- 10 Close the **Waiting List** screen.

## Documenting Waiting List Contact Events for Prospects

Prospects may contact you frequently requesting information about their waiting list position. You may also contact prospects requesting information about their continued interest in remaining on the list. Recording all contact events helps ensure that your waiting list continues to be current and compliant.

### To document a contact event for a prospect on a waiting list

- 1 On the **Community Manager Dashboard** screen, select the property.
- 2 Perform a person search to find the household head.
  - a Click the **Person Search** tab and perform a search to find the household head.
  - b On the **Person Search** tab, click the person's name. The **Prospect Guest Card** screen appears. The selected leasing step on the guest card is the last step that you completed.
- 3 Click the **Waiting List** button. The **Waiting List** screen appears. The **Contact Log** tab appears in the bottom part of the screen.

**Waiting List**

Name	Jean D. Grant	First Choice	2 BR
Address	43 Previous Street	Second Choice	
		Third Choice	
City, State, Zip	Atown, SC 49400	Household Size	4
Office Telephone	(843) 445-4567	Annual Income	0.00
Home Phone	(843) 454-6231	Comment	

Save Help

**Property Waiting Lists For This Prospect**  
kn125t

Contact Log Tax Credit Demographics Preferences Position

Contact Date  Comment

Contact Time

Type of Contact

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	11/22/2016	3:45 PM	New Application	Applied as Jean D. Grant. 1st Choice-2 BR	On List	karinn	karinn

**4** On the **Contact Log** tab, add the following information.

<b>Contact Date</b>	Type or select the date on which the contact occurred.
<b>Contact Time</b>	Type or select the contact time.
<b>Type of Contact</b>	Select the type of contact or event that you are recording. For example, if you are recording a contact for a phone conversation, select <b>Update</b> or <b>Active</b> .
<b>Comments</b>	Type notes or remarks, if needed.  <b>NOTE</b> Ensure that your comment comply with fair housing laws. Follow direction of management in your organization before adding comments

**Waiting List**

Name: Jean D. Grant  
 Address: 43 Previous Street  
 City, State, Zip: Atown, SC 49400  
 Office Telephone: (843) 445-4567  
 Home Phone: (843) 454-6231

First Choice: 2 BR  
 Second Choice:  
 Third Choice:  
 Household Size: 4  
 Annual Income: 0.00

[Property Waiting Lists For This Prospect](#)  
[kn125t](#)

[Save](#) [Help](#)

[Contact Log](#) [Tax Credit](#) [Demographics](#) [Preferences](#) [Position](#)

**Type of contact** → Contact Date: 01/04/2018  
 Contact Time: 11:15 AM  
 Type of Contact: Update

Comment: Call from applicant requesting update on c. X  
[Add to Contact Log](#)

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	11/22/2016	3:45 PM	New Application	Applied as Jean D. Grant. 1st Choice-2 BR.	On List	karinn	karinn

- 5 Click **Add to Contact Log**. Voyager adds the information to the prospect's contact log. A row appears at the top of the prospect's contact history.

**Waiting List**

Name: Jean D. Grant  
 Address: 43 Previous Street  
 City, State, Zip: Atown, SC 49400  
 Office Telephone: (843) 445-4567  
 Home Phone: (843) 454-6231

First Choice: 2 BR  
 Second Choice:  
 Third Choice:  
 Household Size: 4  
 Annual Income: 0.00  
 Comment:

[Save](#) [Help](#)

**Property Waiting Lists For This Prospect**  
[kn125t](#)

**Contact Log** | Tax Credit | Demographics | Preferences | Position

Contact Date:    
 Contact Time:    
 Type of Contact:

Comment:  [Add to Contact Log](#)

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	01/04/2018	11:15 AM	Update	Call from applicant requesting update on current position	On List	karinn	karinn
	11/22/2016	3:45 PM	New Application	Applied as Jean D. Grant. 1st Choice-2 BR	On List	karinn	karinn

Most recent contact

## Documenting Waiting List Contact Events for Residents

Residents on a property's waiting list for a unit transfer may call or visit the site manager's office to inquire about their waiting list status. Add these contact events to the resident's waiting list contact log.

**To document a contact event for a resident on a waiting list**

- 1 On the **Community Manager Dashboard** screen, select the property.
- 2 Perform a person search to find the household head.
  - a Click the **Person Search** tab and perform a person search to find the household head.
  - b On the **Person Search** tab, click the person's name. The **Resident** screen appears.

### 3 On the **Data** menu, Click **Affordable Waiting List**.

#### Affordable Waiting List

**Resident** Functions Data Reports

First Name: William MI M  
 Last Name: Everton  
 Address: 42 Main Street 4A  
 City/State/Zip: Atown SC 49400  
 Email: [wme@eamil.com](mailto:wme@eamil.com)  
 Alt. Email:  
 Office: (843) 665-6767  
 Home: (843) 377-6789  
 FAX:

Attachment  
 Credit Card Setup  
 EFT Setup  
 Email  
 Inspection  
 Memo  
 New WO  
 Recurring Payment Setup  
 Lease Charges  
 Roommates (1)  
 Manage Rentable Items  
 Resident History

Workflow  
 Billing & Payments Interface  
 Collections Interface  
 Bonded  
 Billing & Payments Interface  
 Additional Care Information  
 CRRM Lease Renewal  
 Transfer Preferences  
 Former Tenant/Collections Data  
 Affordable Waiting List  
 50059 Certification Stack  
 50059 History

Affordable Lease Info Deposit Info Lease Charges Other Info Personal Info

Tax Credit Data							
Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
<a href="#">AR</a> <a href="#">Print</a>	12/01/2017	1,360	1,055	45	1,010	0	<a href="#">View</a>
<a href="#">MI</a> <a href="#">Print</a>	12/15/2016	822	822	50	772	0	<a href="#">View</a>

Tax Credit ☒ Subsidy Provider

The **Waiting List** screen appears. The **Contact Log** tab appears in the bottom part of the screen.

**Waiting List**

Name: William M. Everton First Choice: 2 BR  
 Address: 20 Oldtown Avenue Second Choice:  
 Unit 50 Third Choice:  
 City, State, Zip: Atown, SC 49400 Household Size: 2  
 Office Telephone: Annual Income: 10,400.00  
 Home Phone: (854) 377-6789 Comment:  
 Save Help

Property Waiting Lists For This Prospect  
[kn125t](#)

Contact Log Tax Credit Demographics Preferences Position

Contact Date: Comment:  
 Contact Time: Add to Contact Log  
 Type of Contact:

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	02/27/2018	11:00 AM	New Application	1st Choice-2 BR	On List	karinn	karinn
	12/15/2016	11:00 AM	Moved In		Moved In	karinn	karinn
	12/15/2016	8:00 PM	Unit Accepted	Unit has special features for disabled, needed by HOH	On List	karinn	karinn
	12/15/2016	9:00 AM	Application Approved	Unit has special features for disabled, needed by HOH	On List	karinn	karinn
	10/15/2016	10:45 AM	New Application	Applied as William M. Everton. 1st Choice-1 BR, 2nd Choice-2 BR	On List	karinn	karinn

- 4 On the **Contact Log** tab, add the following information.

<b>Contact Date</b>	Type or select the date on which the contact occurred.
<b>Contact Time</b>	Type or select the time of the contact.
<b>Type of Contact</b>	Select the type of contact or event that you are recording. For example, if you are recording a contact for a phone conversation, select <b>Update</b> or <b>Active</b> .
<b>Comments</b>	Type notes or remarks, if needed.  <b>NOTE</b> Ensure that your comments comply with fair housing laws. Follow direction of management in your organization when adding comments

- 5 Click **Add to Contact Log**. Voyager adds the information to the resident's contact log.

## Conclusion and Exercises

You should now be able add an LIHTC prospect or resident household to a Voyager affordable housing waiting list. Completing the following exercises will help you to retain your new knowledge.

### Exercises

- 1 Add a guest card for a new prospect and then add the household to the property's waiting list.
- 2 Document two waiting list contact events for the prospect.
- 3 Add a resident to the property's waiting list.
- 4 Document a waiting list contact event for the resident.

# CHAPTER 2

## LIHTC Property Waiting List Application Management

**In this lesson:**

Introduction to LIHTC Waiting List Application Management .....	18
Moving Households to the Bottom of a Waiting List .....	19
Rejecting Applicants on a Waiting List .....	21
Denying Waiting List Applicants Assigned to Units .....	23
Removing Households from a Waiting List .....	25
Conclusion and Exercises .....	28

This lesson explains how to change the position of a household on a HUD 50059 property waiting list, reject a household on a waiting list, and remove a household from a waiting list.

### Introduction to LIHTC Waiting List Application Management

Background report results, failure to qualify, lack of contact, or other issues may cause the need for rejecting a household on a waiting list. Violations of your organization’s resident selection plan or other issues may cause the need to move the household to the bottom of the list. Households also occasionally ask to be removed from a waiting list. HUD specifically requires that you document any change, action, or activity regarding a household on a waiting list. When you take any of these actions, ensure that you adequately document the reasons.



For information about HUD waiting list requirements, see *HUD Handbook 4350.3, REV-1, CHG-4, Chapter 4*.

In this lesson, you will learn how to complete the following tasks:

- 1 Move households to the bottom of a waiting list.
- 2 Reject waiting list applicants.
- 3 Remove households from a waiting list.



## Moving Households to the Bottom of a Waiting List

When you need to move a household to the bottom of a waiting list, you must add a contact log event. Adding a contact log event of the type **Move to Bottom of WL** automatically resets the date and time at which the household was added to the list.



If an **Additional Properties** tab appears on the **Waiting List** screen and additional properties are selected for the household, moving the household to the bottom of the waiting list for the subject property also moves the household to the bottom of the lists for the selected additional properties.

If you added the prospect manually to the waiting lists of several properties, moving the prospect to the bottom of the waiting list for one property does *not* automatically move the prospect to the bottom of the other waiting lists.

If you keep waiting list electronically, HUD requires you to periodically print the waiting list or preserve backup copies, showing how the waiting list appeared before and after you changed a household's position on the list. Carefully follow the policies of your management organization when moving a household to the bottom of a waiting list. Clearly document the time, date, and reason. Always ensure that comments, notes, or remarks comply with fair housing laws.

### To move a household to the bottom of a waiting list

**1** On the **Community Manager Dashboard** screen, select the property.

**2** Perform a person search to find the household head.

**3** On the **Person Search** tab, click the person's name.

- If the person is a prospect, the **Prospect Guest Card** screen appears.

Click the **Waiting List** button. The **Waiting List** screen appears.

- If the person is a resident, the **Resident** screen appears.

From the **Data** menu in the top part of the **Resident** screen, select **Affordable Waiting List**. The **Waiting List** screen appears.

**4** On the **Contact Log** tab, add the following Information.

<b>Contact Date</b>	Type or select the date on which you moved the household to the bottom of the waiting list.
<b>Contact Time</b>	Type or select the time on which you moved the household to the bottom of the waiting list.
<b>Type of Contact</b>	Select <b>Move to Bottom of WL</b> .
<b>Comments</b>	Type or select notes or remarks, if needed.  <b>NOTE</b> Ensure that your comments, notes, or remarks comply with Fair Housing laws. Follow direction of management in your organization before adding comments.

Waiting List

Name

Sandra K. Bowen

Address

52 Oldtown Avenue

City, State, Zip

Atown, SC 49400

Office Telephone

Home Phone

(843) 546-5684

Save

Help

First Choice

2 BR

Second Choice

Third Choice

Household Size

4

Annual Income

0.00

Comment

Property Waiting Lists For This Prospect

kn125t

Contact Log

Tax Credit

Demographics

Preferences

Position

Contact Date

10/18/2017

Comment

Per selection plan: refused two units

Contact Time

9:00 AM

Add to Contact Log

Type of Contact

Move to Bottom of WL

Edit

Date

Time

Type of Contact

Comment

Status

Added By

Edited By

10/17/2017

2:30 PM

Unit Refused

Per household head: not ready for decision

On List

karinn

karinn

10/17/2017

11:00 AM

Unit Offered

On List

karinn

karinn

03/07/2017

4:15 PM

Unit Refused

Per household head: wants different location

On List

karinn

karinn

03/07/2017

10:45 AM

Unit Offered

On List

karinn

karinn

02/03/2017

9:45 AM

New Application

Applied as Sandra K. Bowen. 1st Choice-2 BR

On List

karinn

karinn

## 5 Click **Add to Contact Log**.

Voyager saves the contact log event and adds a row to the log. The household is now at the bottom of the waiting list as of your selected date and time.

**Waiting List**

Name: Sandra K. Bowen  
 Address: 52 Oldtown Avenue  
 City, State, Zip: Atown, SC 49400  
 Office Telephone:  
 Home Phone: (843) 546-5684

First Choice: 2 BR  
 Second Choice:  
 Third Choice:  
 Household Size: 4  
 Annual Income: 0.00  
 Comment:

[Save](#) [Help](#)

**Property Waiting Lists For This Prospect**  
[kn125t](#)

**Contact Log** | Tax Credit | Demographics | Preferences | Position

Contact Date:    
 Contact Time:    
 Type of Contact:

Comment:  [Add to Contact Log](#)

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	10/18/2017	9:00 AM	Move to Bottom of WL	Per selection plan: refused two units	On List	karinn	karinn
	10/17/2017	2:30 PM	Unit Refused	Per household head: not ready for decision	On List	karinn	karinn
	10/17/2017	11:00 AM	Unit Offered		On List	karinn	karinn
	03/07/2017	4:15 PM	Unit Refused	Per household head: wants different location	On List	karinn	karinn
	03/07/2017	10:45 AM	Unit Offered		On List	karinn	karinn
	02/03/2017	9:45 AM	New Application	Applied as Sandra K. Bowen. 1st Choice-2 BR	On List	karinn	karinn

Waiting list contact type

Waiting list status

## Rejecting Applicants on a Waiting List

Responses from references, the results of a criminal background check, or other issues may cause you to reject an applicant on a waiting list. If you need to reject an applicant, clearly document the date, time, and reason for the rejection.

### To reject an applicant on a waiting list

- 1 On the **Community Manager Dashboard** screen, select the property.
  - a Click the **Person Search** tab and perform a search to find the household head.
  - b On the **Person Search** tab, click the person's name. The **Prospect Guest Card** screen appears.
  - c Click the **Waiting List** button. The **Waiting List** screen appears.

## 2 On the **Contact Log** tab, complete following fields:

<b>Contact Date</b>	Date on which you are rejecting the applicant from the waiting list
<b>Contact Time</b>	Time at which you are rejecting the applicant from the waiting list
<b>Type of Contact</b>	Type of contact that you are recording Select <b>Application Rejected</b> .
<b>Rejection Reason</b>	Type or select the reason for the rejection <b>NOTE</b> If you are manually typing the reason, ensure that your comments, notes, and remarks comply with fair housing laws. Follow direction of management in your organization before adding comments.

Waiting List

Name

Michael D. Straus

Address

42 Previous Avenue

City, State, Zip

Atown, SC 49400

Office Telephone

(843) 545-6567

Home Phone

First Choice

1 BR

Second Choice

Third Choice

Household Size

2

Annual Income

0.00

Comment

Save

Help

Property Waiting Lists For This Prospect

kn125t

Contact Log

Tax Credit

Demographics

Preferences

Position

Contact Date

01/04/2018

Contact Time

11:00 AM

Type of Contact

Application Rejected

Comment

Did not pass background check

Add to Contact Log

Edit

Date

Time

Type of Contact

Comment

Status

Added By

Edited By

12/05/2017

2:00 PM

New Application

Applied as Michael D. Straus. 1st Choice-1 BR

On List

karinn

karinn

Type of contact

Reason for rejection

- 3 Click **Add to Contact Log**. You have rejected the applicant. Voyager updates the applicant's contact log. The household is no longer on the waiting list.



If a rejected applicant wins an appeal for the denial and then re-applies, Voyager adds the applicant to the waiting list in the applicant's original position.

Contact Log | Tax Credit | Demographics | Preferences | Position

Contact Date:    
 Contact Time:    
 Type of Contact:

Comment:   
 Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	01/04/2018	11:00 AM	Application Rejected	Did not pass background check	Removed	karinn	karinn
	12/05/2017	2:00 PM	New Application	Applied as Michael D. Straus. 1st Choice-1 BR	On List	karinn	karinn

Waiting list status

## Denying Waiting List Applicants Assigned to Units

When you deny a prospect household that is on a waiting list, Voyager automatically removes that household from the property's waiting list. You do not need to manually process the removal.

In the following graphic, the Jones family is at the top of the waiting list. After assigning the household to a unit, the management organization needs to deny the household.

Household at the top of the waiting list

Calendar | Waiting List Details - 01/05/2018 | Person Search

Rank	Prospect Property	Name and Address	BR Size Pref	Effective Date	Effective Time	Household Size	Comment	Preferences	TC Special Needs	TC Percent of AMGI	Cur Sta
1	kn125t	Nancy R. Miller 30 Old Avenue Atown, SC 49400 Home: (843) 554-5656 Cell: (843) 445-4567	1BR-First Choice	07/10/2017	4:30 PM	2				0.00	On L
2	kn125t	Caroline A. McDonald 345 Previous Street AtownSC, SC 49400 Home: (843) 767-8986 Office: (843) 223-4345 Cell: (576) 184-5634	1BR-First Choice	11/05/2016	9:30 AM	1				45.00	On L
3	kn125t	Leslie D. Woods 42 Previous Street AtownSC, SC 49400	1BR-Second Choice	02/02/2017	10:00 AM	4				30.00	On L
4	kn125t	Stella J. Shepherd 25 Previous Street Atown, SC 49400 Office: (843) 445-4567 Cell: (843) 451-2323	1BR-Second Choice	06/12/2017	10:30 AM	3				50.00	On L

### To deny a waiting list applicant assigned to a unit

- 1 On the **Community Manager Dashboard** screen, select the property.
- 2 Click the **Person Search** tab and perform a search to find the household head.
  - a Click the person's name. The **Prospect Guest Card** screen appears. The **Leasing Steps** menu appears in the top part of the screen, on the right.
  - b If needed, click **Application Status** on the **Leasing Steps** menu. the **Application Status** tab appears in the bottom part of the screen.

In the following graphic, the Cooper household is assigned to unit 8A and is on the **Application Status** leasing step.

**Prospect Guest Card** Other Data ▼

First Name: Nancy MI R  
 Last Name: Miller  
 Address: 30 Old Avenue  
 City State Zip: Atown SC 49400  
 Tel# Office-Home: (843) 554-5656  
 Cell# - Fax#: (843) 445-4567  
 DOB - DL#/State:   
 Email: nrm@email.com  
 Notes:   
 Status: Applied  
 Code: p0014757  
 Property: kn125t  
 Unit: 11A  
 Unit Type: kn af11  
 First Contact: Call  
 Agent: Fred Flanders  
 Source: Internet  
 Result:   
 Date: 12/15/2017

**Leasing Steps**

- [Guest Card](#)
- [Preferences](#)
- [Occupants](#)
- [Select Unit](#)
- [Rental Options](#)
- [Concessions](#)
- [Application Form](#)
- [Application Charges](#)
- Application Status**

**Application Status**

Action	Date	Agent
Submit Application	01/05/2018	Fred Flanders

**Buttons:** Contacts, Waiting List, Previous, Quote, Ledger, Assign Unit, Approve, Deny, Cancel, Edit TIC, Adjust Move-In Date

Deny button

- 3 Click the **Deny** button. The **Deny Application** screen appears.
- 4 Select the denial date, time, property agent, and reason for denial.
- 5 If needed, type comments or remarks for the household's waiting list contact log.



Always ensure that waiting list comments, notes, or remarks comply with fair housing laws. Follow direction of management in your organization before adding comments.

The following graphic shows the **Deny Application** screen.

**Deny Application**

Nancy R. Miller, Residential Waiting List Rank: 1

Date: 01/05/2018

Time: 10:45 AM

Agent: Fred Flanders

Reason: References

Removal Comment for Waiting List Contact Log

Background check. See applicant's file for information

Save

6 Click **Save**. A confirmation message appears.

7 Click **OK**. You have denied the applicant and removed the applicant from the waiting list.

The following graphic shows the waiting list after the Jones household was denied. The household is no longer on the property's waiting list.

Calendar   Waiting List Details - 01/05/2018   Person Search											
Rank	Prospect Property	Name and Address	BR Size Pref	Effective Date	Effective Time	Household Size	Comment	Preferences	TC Special Needs	TC Percent of AMGI	Cu S
1	kn125t	Caroline A. McDonald 345 Previous Street AtownSC, SC 49400 Home: (843) 767-8986 Office: (843) 223-4345 Cell: (576) 184-5634	1BR-First Choice	11/05/2016	9:30 AM	1				45.00	On
2	kn125t	Leslie D. Woods 42 Previous Street AtownSC, SC 49400	1BR-Second Choice	02/02/2017	10:00 AM	4				30.00	On
3	kn125t	Stella J. Shepherd 25 Previous Street Atown, SC 49400 Office: (843) 445-4567 Cell: (843) 451-2323	1BR-Second Choice	06/12/2017	10:30 AM	3				50.00	On

## Removing Households from a Waiting List

Circumstances occur in which you need to remove a household from a waiting list.

- A prospect may not respond to a request for an eligibility interview.
- A resident waiting for a unit transfer may decide to remain in its present unit.

- You manually added a prospect to waiting lists for several properties and need to remove the household from those other properties after move-in.



If an **Additional Properties** tab appears in the **Waiting List** screen and additional properties are selected for a household, removing the household from the waiting list of the subject property also removes the household from the lists for those additional properties. If you added the prospect manually to waiting lists for several properties, removing the prospect from the waiting list of one property does not automatically remove the prospect from the waiting lists of the other properties.

Carefully follow the policies of your management organization when removing a household from a waiting list. Clearly document the time, date, and reason. Always ensure that comments, notes or remarks comply with fair housing laws.

Documenting a contact event of the contact type **Removed** removes a household from a waiting list. After you have completed and saved the information, the household's waiting list status automatically changes to **Removed**.

### To remove a household from a waiting list

- 1 Perform a person search to find the household head.
  - a Click the **Person Search** tab and perform a person search to find the household head.
  - b On the **Person Search** tab, click the person's name. The **Prospect Guest Card** screen appears.
  - c Click the **Waiting List** button. The **Waiting List** screen appears.



2 On the **Contact Log** tab, add the following Information.

<b>Contact Date</b>	Type or select the date on which you are removing the household from the waiting list
<b>Contact Time</b>	Select the time at which you are removing the household from the waiting list
<b>Type of Contact</b>	Select <b>Removed</b> .
<b>Comments</b>	Type notes or remarks, if needed.  <b>NOTE</b> Ensure that your comments, notes, and remarks comply with fair housing laws. Follow direction of management in your organization before adding comments.

**Waiting List**

Name: Priscilla B. Nold  
 Address: 444 Previous Street  
 City, State, Zip: Atown, SC 49400  
 Office Telephone: (843) 445-4567  
 Home Phone: (843) 512-4387

First Choice: 2 BR  
 Second Choice:   
 Third Choice:   
 Household Size: 2  
 Annual Income: 0.00

Comment: Resident is expecting a baby. Needs 2 br unit

Property Waiting Lists For This Prospect: kn125t

Save Help

Contact Log Tax Credit Demographics Preferences Position

Contact Date: 01/05/2018  
 Contact Time: 3:30 PM  
 Type of Contact: Removed

Comment: Found a unit in another property

Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	01/25/2017	10:00 PM	New Application	Applied as Priscilla B. Nold. 1st Choice-2 BR	On List	karinn	karinn

Contact type

### 3 Click **Add to Contact Log**.

Voyager saves the information and adds a line to the contact log. The household's waiting list status is now **Removed**.

Waiting List

Name

Priscilla B. Nold

Address

444 Previous Street

City, State, Zip

Atown, SC 49400

Office Telephone

(843) 445-4567

Home Phone

(843) 512-4387

Save

Help

First Choice

2 BR

Second Choice

Third Choice

Household Size

2

Annual Income

0.00

Comment

Resident is expecting a baby.  
Needs 2 br unit

Property Waiting Lists For This Prospect

kn125t

Contact Log

Tax Credit

Demographics

Preferences

Position

Contact Date

Contact Time

Type of Contact

Comment

Add to Contact Log

Edit

Date

Time

Type of Contact

Comment

Status

Added By

Edited By

	01/05/2018	3:30 PM	Removed	Found a unit in another property	Removed	karinn	karinn
	01/25/2017	10:00 PM	New Application	Applied as Priscilla B. Nold. 1st Choice-2 BR	On List	karinn	karinn

Waiting list contact type

Waiting list status

## Conclusion and Exercises

You should now be able to complete the following tasks: move a household to the bottom of a waiting list, deny a waiting-list household assigned to a unit, and remove a household from a waiting list. Completing the following exercises will help you to retain your new knowledge.

### Exercises

- 1 Move a prospect household to the bottom of a property's waiting list.
- 2 Reject a household that is on a waiting list.
- 3 Deny a waiting-list household that is assigned to a unit.
- 4 Remove a household from a property's waiting list.

# CHAPTER 3

## LIHTC Property Waiting List Management

**In this lesson:**

Introduction to LIHTC Waiting List Management .....	29
Reviewing Waiting List for LIHTC Properties.....	30
Reviewing and Updating Waiting List Information for Prospects .....	32
Reviewing and Updating Waiting List Information for Residents .....	33
Generating LIHTC Property Waiting List Reports .....	34
Conclusion and Exercises .....	36

This lesson explains how to review LIHTC property waiting lists and generate waiting list reports.

### Introduction to LIHTC Waiting List Management

Voyager keeps a contact history for each household and requires contact-log entries for waiting list actions and events that affect a household’s position on the list, such as moving a household to the bottom of the list or removing a household from the list. You can also add contact-log entries as you interact with households on a waiting list.

You can review a household’s contact history and print an affordable housing waiting list report that shows each household’s position on the list at a specific point in time.

In this lesson, you will learn how to complete the following tasks:

- 1 Review an LIHTC property’s waiting list.
- 2 Review waiting list information for a prospect.
- 3 Review waiting list information for a resident.
- 4 Generate a waiting list report.

## Reviewing Waiting List for LIHTC Properties

In the **Traffic** section on the **Community Manager Dashboard**, the number to the right of the **Affordable Waiting Lists** heading represents the waiting list for the selected property. Although each property has only one waiting list, Voyager shows the waiting list subdivided by bedroom size defined as the number of bedrooms in the unit. Voyager shows a separate list for units of each bedroom size.

For example:

- If a waiting list includes only households requesting one-bedroom units, or if a waiting list includes only households requesting two-bedroom units, the number **1** appears to the right of the heading. Clicking the number displays the Affordable Waiting Lists tab with *one* waiting list.
- If a waiting list includes households requesting two-bedroom units and households requesting three-bedroom units, or if a waiting list includes households requesting one-bedroom units and three-bedroom units, the number **2** appears to the right of the heading. Clicking the number displays the Affordable Waiting Lists tab with *two* waiting lists, one for each bedroom size that the households on the list have requested.



Although a waiting list has been set up for a property, a zero (**0**) appears to the right of the **Affordable Waiting Lists** heading in the **Traffic** section on the **Community Manager Dashboard** screen until you have added a household to the waiting list.

### To review the waiting list for an LIHTC property

- 1** On the **Community Manager Dashboard** screen, select the property.
- 2** In the **Traffic** section of the dashboard, click the number for **Affordable Waiting Lists**.

On the row for the list that you want to review, click the number in the **Number on List** field. The

Property	BR Size	Number on List	Current Status
kn125t	1 BR	<u>5</u>	Opened on 1/2/2017 at 8:15 AM
kn125t	2 BR	<u>2</u>	Opened on 1/2/2017 at 8:15 AM

### List by number of bedroom sizes

### Waiting list sorted by bedroom size

- 3** On the row for the list that you want to review, click the number in the **Number on List** field.

The **Waiting List Details** tab appears in the bottom part of the screen.

The following graphic shows an example of a two-bedroom waiting list.

Community Manager Dashboard - Credit Road Apartments

Resident Activity	Unit Statistics	Friday, January 05, 2018
Move In: 0	Total Units: 16	Prop/List: kn125t
Move Out: 0	Leased Units: 15 (93.75%)	<a href="#">Add Guest</a> <a href="#">Quick Guest</a>
Deposit Accounting: 0	Occupied Units: 15 (93.75%)	<a href="#">Leasing Specials</a> <a href="#">Daily Activity</a>
On Notice: 0	Available Units: 1 (6.25%)	<a href="#">Hot Sheet</a> <a href="#">Monitor Reports</a>
Incomplete Certs: 4	Model/Down/Admin: 0 (0%)	<a href="#">New PO</a> <a href="#">New Svc. Req.</a>
Annual Certs Due: 6	On Hold Units: 0 (0%)	<a href="#">Print Letters</a> <a href="#">Tax Credit Quick Check</a>
Unanswered Letters: 0	Unit Transfers: 0	<b>Open Batches</b>
Expiring Leases (120 days): 13		<a href="#">Charges</a> <a href="#">New Charge Batch</a>
Scheduled Lease Renewals: 0		<a href="#">Receipts</a> <a href="#">New Receipt Batch</a>
Alerts: 0		<a href="#">Payables</a> <a href="#">New Payable Batch</a>
Scheduled Roommate Promotions: 0		
<b>Maintenance</b>	<b>Traffic</b>	
Pending Make Ready: 0	Prospect Pipeline: 3	
Pending Work Requests: 0	Today's Showings: 0	
Completed WO Followup: 0	Affordable Waiting Lists: 2	
	Pending Applications: 0	

Calendar | **Waiting List Details - 01/05/2018** | Person Search

Rank	Prospect Property	Name and Address	BR Size Pref	Effective Date	Effective Time	Household Size	Comment	Preferences	TC Special Needs
1	kn125t	<a href="#">Leslie D. Woods</a> <a href="#">42 Previous Street</a> <a href="#">AtownSC, SC 49400</a>	2BR-First Choice	02/02/2017	10:00 AM	4		USA Veteran	
2	kn125t	<a href="#">Joshua L. Lundeen</a> <a href="#">45 Previous Street</a> <a href="#">Atown, SC 49400</a> Home: (843) 557-6231 Cell: (843) 445-4345	2BR-First Choice	01/04/2018	4:45 PM	1		Disabled, Transfer	
3	kn125t	<a href="#">Jean D. Grant</a> <a href="#">43 Previous Street</a> <a href="#">Atown, SC 49400</a> Home: (843) 454-6231 Office: (843) 445-4567	2BR-First Choice	11/22/2016	3:45 PM	4			
4	kn125t	<a href="#">Lindsey S. Ring</a> <a href="#">25 Oldtown Avenue</a> <a href="#">Atown, SC 49400</a> Home: (843) 551-2434 Office: (843) 554-6567 Cell: (675) 443-4321	2BR-First Choice	12/12/2016	10:45 AM	4			
5	kn125t	<a href="#">Stella J. Shepherd</a> <a href="#">25 Previous Street</a> <a href="#">Atown, SC 49400</a>	2BR-First Choice	05/12/2017	10:30 AM	2			

Waiting list sort order

- If the household is a prospect, the name and address is a link to the **Prospect Guest Card** screen.
- If the household is a resident, the name and address is a link to the **Resident** screen.

**4** When you are finished reviewing the waiting list, click the **Home** button on the Voyager top menu to close the **Affordable Waiting List** tab.

## Reviewing and Updating Waiting List Information for Prospects

As you interact with a prospect on a property's waiting list, you will need to document each contact event. You will also need to update the prospect's waiting list record as you receive new information.

### To review or update a prospect's waiting list information

- 1 On the **Community Manager Dashboard** screen, select the property.
- 2 Perform a person search to find the household head.
- 3 Click the person's name. The **Prospect Guest Card** screen appears. The selected leasing step on the guest card is the last step that you completed for the household.
- 4 Click the **Waiting List** button. The **Waiting List** screen appears.
- 5 Review the information. If needed, add additional comments or document a new contact event.
- 6 When you are finished, close the **Waiting List** screen and then close the **Prospect Guest Card** screen.



If the waiting list is short, you can find and review a prospect's waiting list information on the **Community Manager Dashboard** screen.

- 1 In the **Traffic** section, click the number for **Affordable Waiting Lists**. The **Affordable Waiting Lists** tab appears in the bottom part of the screen.
- 2 Click the **Number on List** for the waiting list that you want to review. The **Waiting List Details** tab appears.
- 3 For the person whom you want to review, click the person's name. The **Prospect Guest Card** screen appears.
4. Click the **Waiting List** button on the **Prospect Guest Card** screen.

## Reviewing and Updating Waiting List Information for Residents

As you interact with a resident on a property's waiting list, you will need to document each contact event. You will also need to update the resident's waiting list record as you receive new information.

### To review or update a resident's waiting list information

- 1 On the **Community Manager Dashboard** screen, select the property.
- 2 Perform a person search to find the household head.
- 3 Click the person's name. The **Resident** screen appears.
- 4 From the **Data** menu on the **Resident** screen, click the **Affordable Waiting List**. The **Waiting List** screen appears.
- 5 Review the information. If needed, add additional comments or document a new contact event.
- 6 When you are finished, close the **Waiting List** screen.

## Generating LIHTC Property Waiting List Reports

Voyager provides waiting list and waiting list history reports with or without demographics information. Waiting list reports with demographics include the race, gender, and ethnicity of the household head.

- Waiting list reports show households on a property's waiting list as of a specified date.
- Waiting list history reports show waiting list information within a selected date range.

After displaying a report, you can save or print it either as a Microsoft Excel or Adobe PDF.

For this lesson, we will generate a Waiting List report.

### To generate an affordable housing Waiting List report

- 1 On the **Community Manager Dashboard** screen, select the property.
- 2 Click the **Monthly Procedures** button in the top part of the screen. The **Affordable Monthly Procedures** menu appears. The **Reports** column appears on the right side of the screen.
- 3 Under the **Analytics Reports** heading, click **Compliance Reports**. The filter section of the **Compliance Reports** screen appears.

The screenshot shows the 'Compliance Reports' filter interface. It contains several input fields and dropdown menus for filtering reports. The 'Property' field is populated with 'kn125t'. The 'Effective Date' is set to '01/31/2018'. The 'Report Type' is set to 'Waiting List'. The 'Summarize By' dropdown is set to 'Property'. There are also checkboxes for 'Show Grid', 'Show 'On List'', 'Show 'Moved In'', and 'Show 'Removed''. Buttons for 'Display', 'PDF', 'Excel', and 'Clear' are located on the right side of the form.

- 4 Complete the filter, as needed.

<b>Report Type</b>	Select the waiting list report that you want to review <b>Waiting List</b> Omits race, gender, and ethnicity information. <b>Waiting List Demographics</b> Includes race, gender, and ethnicity information.
<b>Property</b>	The code of the property selected on the <b>Community Manager Dashboard</b> screen appears. If needed, type or select a different property code.
<b>Bedroom Size</b>	Select the number of bedrooms for which you want to produce the list.
<b>Effective Date</b>	Type or select the starting date for the report. The report will include all households added to the list on or after your selected date.



- If you want to include households on the waiting list as of your selected effective date, select **Yes**.
- If you want to exclude people who were on the list, select **No**.

- If you want to include households that have been removed from the waiting list as of your selected effective date, select **Yes**.
- If you want to exclude people who were on the list, select **No**.

- If you want to include households that had moved in as of your selected effective date, select **Yes**.
- If you want to exclude people who were on the list, select **No**.

If you want to display column-separator lines on the report, select this check box.

The following graphic shows an example of a Waiting List report for all bedroom sizes.

Rank

## Waiting list status

## Conclusion and Exercises

You should now be able review waiting list information a prospect or resident, review the waiting list for an LIHTC property, and generate a waiting list report. Completing the following exercises will help you to retain your new knowledge.

### Exercises

- 1 Review waiting list information for a prospect.
- 2 Review waiting list information for a resident.
- 3 Review a property's waiting list.
- 4 Generate a waiting list report for the property.