Yardi Voyager Affordable Housing HUD 50059 Correction Certification Training Guide





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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 plugins, 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 |
|------------------|----------------------|--------------------------------|---------------------------|
| 11 April 2018 | С | Affordable Plug-In 7.7 | |
| | | Affordable Reports Plug-in 7.6 | |
| | | TRACS Plug-in 1.2 | |
| 7 July 2016 | b | Affordable Plug-In 7.1 | |
| | | Affordable Reports Plug-In 7.1 | |
| | | TRACS Plug-in 1 | |
| 21 August 2015 | a | Affordable Plug-In 2 | Voyager 7.0 |

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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 50059 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 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 our FPI Intranet: https://sites.google.com/a/fpimgt.com/myteamfpi/?pli=1

If you need help determining your logon name and password contact your **FPI Residential Software Department.**

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.

CHAPTER1

Creating 50059 Correction Certifications

| In this lesson | |
|--|-----|
| Introduction to Creating 50059 Correction Certifications | . 1 |
| Creating Correction Certifications | . 3 |

This lesson explains how to add a 50059 correction certification for a HUD 50059 subsidy household.

Introduction to Creating 50059 Correction Certifications

A 50059 correction certification is a partial certification created specifically for correcting inaccurate or incomplete information transmitted in a previous certification file. The correction may be a simple data entry error, such as an incorrect birth date, or a more serious issue, such as unreported family income.

In Voyager, a correction certification is identified by a number that appears to the right of the certification type. For example, Voyager identifies an annual recertification as **AR**. The first correction to an annual certification would be designated **AR-1**. A second correction would be designated **AR-2**.



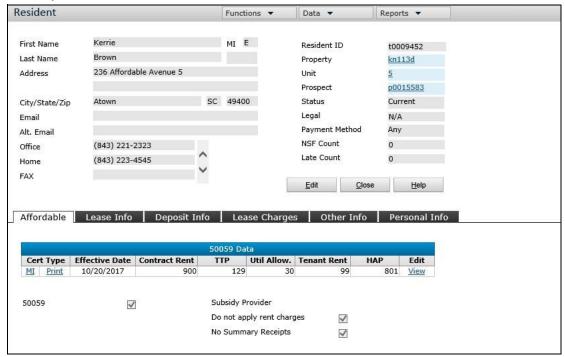
A partial certification (**UT**, **GR**, **MO**, or **TM**) does not exist independently in the TRACS database. For partial certifications, you can correct only information that does not change the certification effective date.

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

- Create a correction certification.
- Make the changes needed for the correction.

To actively follow the steps in this lesson, find or create a current resident household that has an active move-in, initial, interim, or annual recertification that has been transmitted to TRACS. In the examples used for this lesson, we will be creating a correction for unreported income. The unreported income was discovered through an EIV finding after the resident's move-in certification had been transmitted to TRACS.

The following graphic shows the **Resident** screen for the household used in this lesson. The **Affordable** tab is open, showing the household's current tenant rent and HAP for the move-in certification that is the subject of the correction.

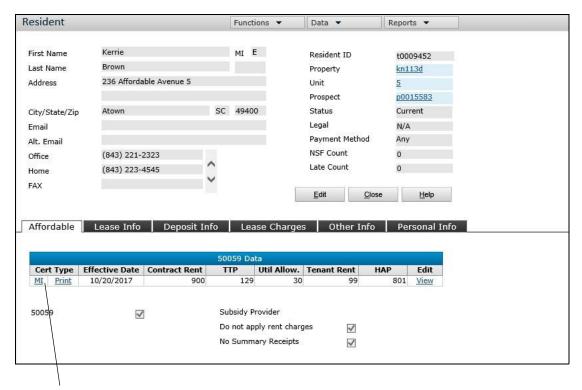


Creating Correction Certifications

Creating a correction 50059 certification corrects inaccurate or incomplete information transmitted to TRACS in a previous certification.

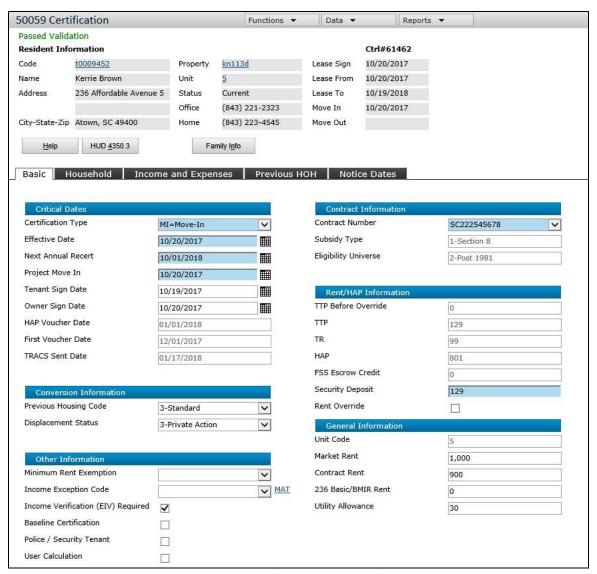
To create a 50059 correction certification

- 1 On the Community Manager Dashboard, select the property.
- 2 Perform a person search to find the household that is the subject of the correction certification.
- Open the **Resident** screen for the selected household.
- 4 In the Cert Type field on the row for the household's current certification, click the certification link. In the following graphic, we are correcting a move-in recertification. The certification type is MI.

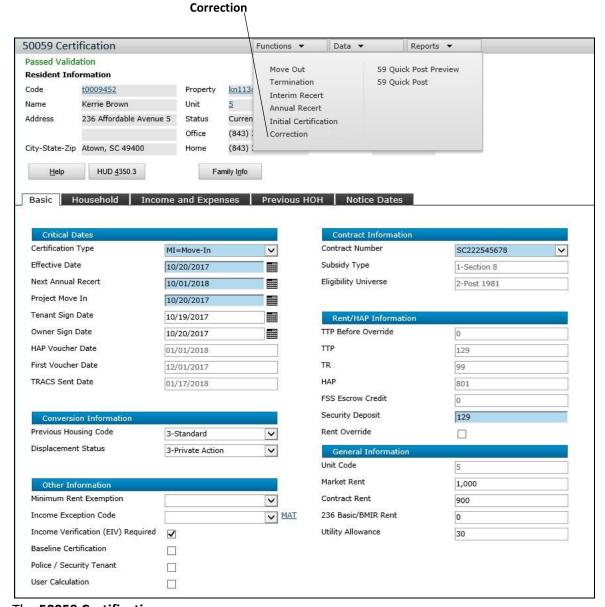


Certification to correct

The **50059 Certification** screen appears.

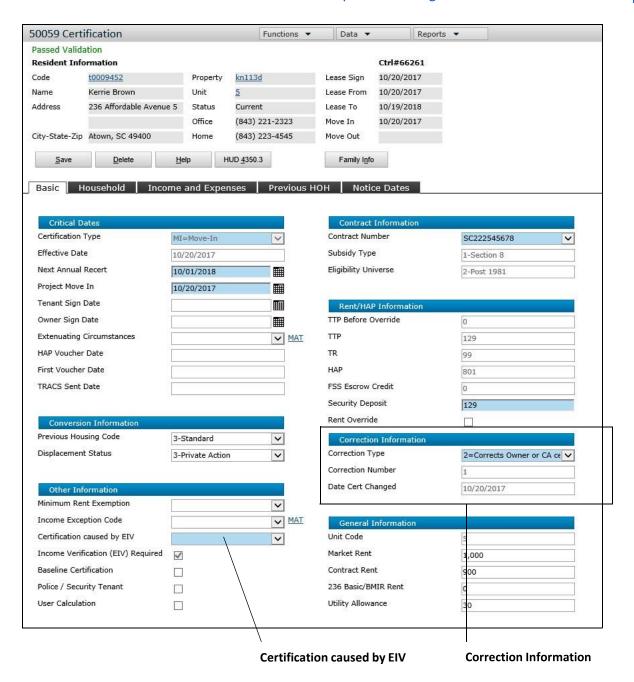


5 From the **Functions** menu in the top part of the **50059 Certification** screen, select **Correction**.



The **50059 Certification** screen appears.

In the Correction Information section on the Basic tab, Voyager automatically completes the Date Cert Changed field with the effective date of the certification that you are correcting. Voyager also completes the Correction Number field with the number of correction certification. The Certification caused by EIV field appears in the Other Information section on the Basic tab.

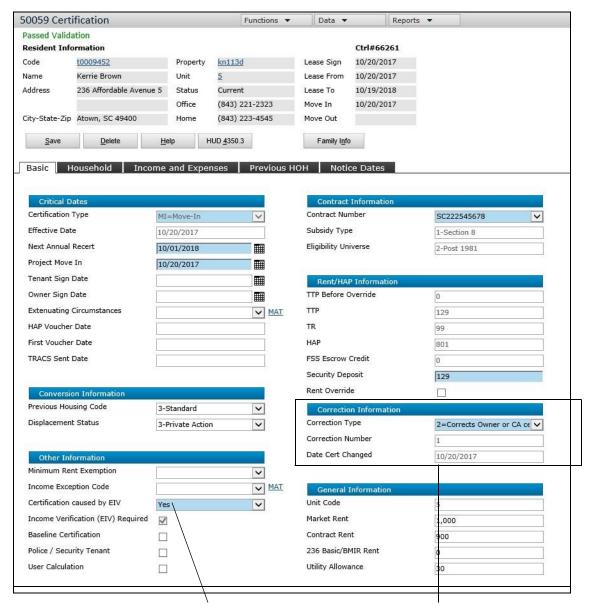


- 6 If an EIV finding caused the need for this correction certification, select Yes. If an EIV finding was not the cause, select No.
- 7 Click Save. You have created the correction certification and are ready to make the needed changes.
- 8 In the Correction Information section, select In the Correction Type field the reason for the correction:
 - 1= Administrative Resubmission Correcting previously submitted certifications

| 2=Corrects Owner or CA cert errors | Correcting owner/agent errors, including errors in project number, subsidy contract number, and transaction type | | |
|------------------------------------|---|--|--|
| | This selection automatically appears when you create a correction certification. | | |
| 3=Corrects tenant misreporting | Correcting tenant misrepresentations, including under-reporting of income and mistakes in information reported about household members. | | |



If the certification that you are correcting is a partial certification (MO, TM, UT, or GR), R=Does not change effective dateappears in the Correction Type field. You cannot change this field.



Certification caused by EIV

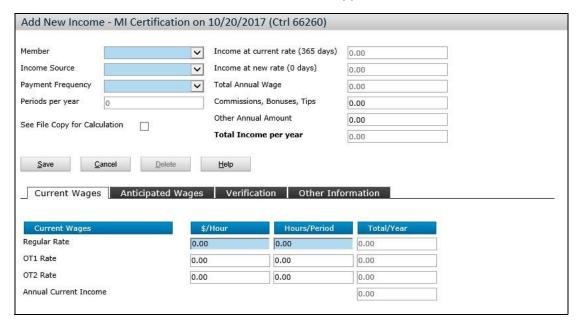
Correction Information

9 If you need to correct information on the **Household** tab, update the information, as needed.

10 Click Save.

For this lesson, we will correct the information for a second job that the household head did not report at move-in.

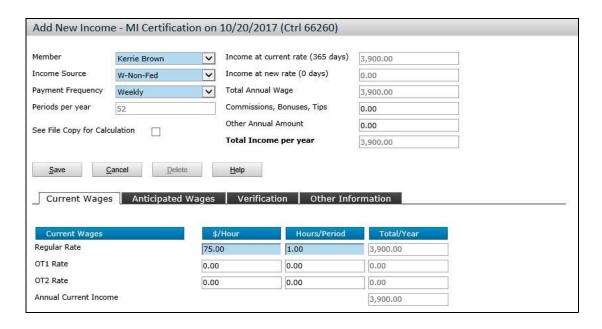
- 11 Click the Family Info button. The family information screen appears. Tabs appear in the bottom part of the screen.
 - a. Click the **Income** tab.
 - **b.** Click the **Add Income** link. The **Income** screen appears.



- **c** In the top part of the screen, select the member, income source, and payment frequency.
- **d** Complete the information in the **Current Wages** tab in the bottom part of the screen.



If you were completing an actual certification for unreported income, you would need to verify this information before completing the certification. In this lesson, we will proceed without completing the verification process.

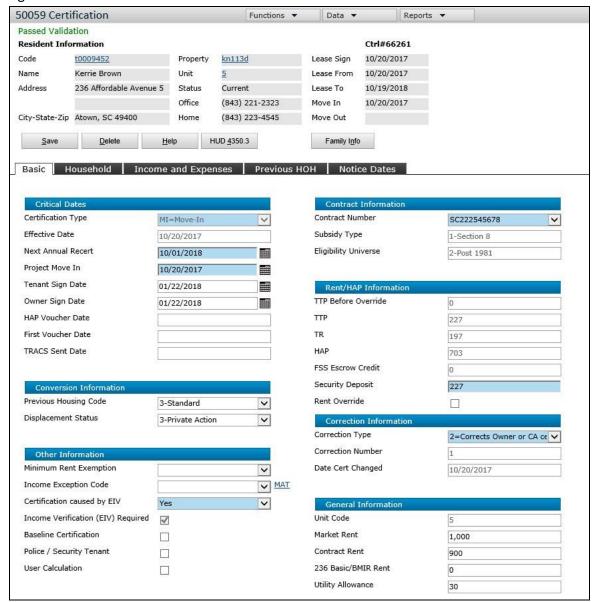


- e Click Save. The Income screen closes.
- **12** Click the **Validation** tab and review the validation information.



13 Click the **Done** button. The **50059 Certification** screen appears.

14 In the Critical Dates section of the 50059 Certification screen, record the owner and resident signature dates.

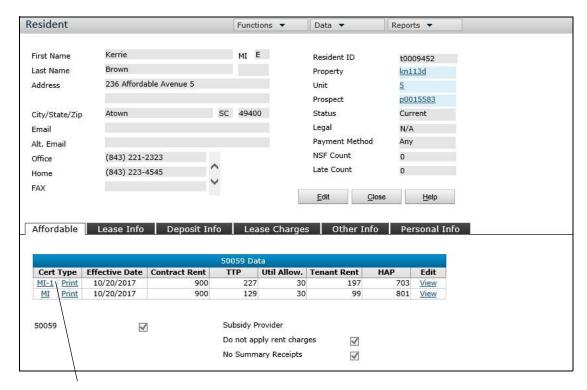


15 Click Save.

16 Close the **50059 Certification** screen. The **Resident** screen appears.

A new row appears on the **Affordable** tab. The **Cert Type** field on the new row shows a certification of the same type that you corrected, with -1 appended to the name. In the example used for this lesson, MI-1 appears for the corrected annual recertification.

In our example, the move-in correction certification caused the tenant rent to increase by \$117.00 and the HAP to decrease by \$117.00.



New correction certification

- 17 Review the rent and HAP information on the Affordable tab for the correction certification. If you changed any family information, rent and HAP may have changed.
- 18 Click the Home button in the top part of the Voyager screen to close the Resident screen and return to the Community Manager Dashboard.