

# Yardi Voyager

## Affordable Housing

### *HUD 50059 Interim*

### *Recertification 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
12 April 2018	c	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 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 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

## 50059 Interim Recertifications

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This lesson explains how to add a 50059 interim recertification for a HUD 50059 household.

### Introduction to 50059 Interim Recertifications

An *interim recertification* (IR) documents changes in household size or circumstances. Examples include a change of household head, the birth of a child, a member moving out, or a change in family income.

This lesson describes how to begin the interim recertification process for a HUD 50059 household. For our example, we will create an interim recertification for a change in household members, income, and assets.



Voyager helps you to complete Voyager screens. For fields that you can complete by typing, typing the first few characters automatically displays a selection list based on information that you previously used in that field. You can either select from the displayed list or complete the field by continuing to type.

To actively follow the steps in this lesson, find or create a household that has a current resident and has an active move-in or annual recertification. For the examples used in this lesson, the household has only an initial certification. The household consists of a disabled husband, a wife, and two children under 18. Both the husband and wife are employed. You can create this type of household in your test database, or you can follow the steps using a different household. For our example, we are creating the interim recertification because the child over 18 is no longer in school and has recently moved out of

the unit. The mother of the household head has sold her home and moved in to the unit with her son and his family. She has Social Security income and a savings account that contains the proceeds of the sale of her home.

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

Resident
Functions
Data
Reports

First Name
George
MI
D
Last Name
Rodriguez
Address
206 Affordable Avenue 5
City/State/Zip
Atown
SC
49480
Email
gr@email.com
Alt. Email
Office
Home
(843) 445-6567
FAX

Resident ID
t0007027
Property
kn206d
Unit
5
Prospect
p0013007
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

50059 Data								
Cert Type	Effective Date	Contract Rent	TTP	Util Allow.	Tenant Rent	HAP	Edit	
IC	Print	03/20/2017	1,000	394	40	354	646	View

50059
☒
Subsidy Provider
Do not apply rent charges
☒
No Summary Receipts
☒

Tenant rent and HAP

## Adding Interim Recertifications

Completing an interim recertification involves the same qualification procedures that you used to qualify the family at move-in. Tasks include interviewing family members, gathering current information about household composition, income, and assets, verifying the new information, and creating the certification. The new rent, and assistance payments if applicable, are based on the recertification.

When you add an interim recertification, Voyager copies the resident's most recent certification to use as the basis for that recertification. You will need to update the information for the changes that occurred since that certification was completed.



This lesson describes how to add an interim recertification through the Resident screen. You can use the **Affordable Monthly Procedures** menu to add interim recertifications. Under item **3** in the **50059 Monthly Procedures** column, select **Interim Recertification**.

### To add an interim recertification for a HUD 50059 household

- 1 On the **Community Manager Dashboard**, select the property.
- 2 Perform a person search to find the household that is the subject of the interim recertification.
- 3 Open the **Resident** screen for the selected household.
- 4 On the **Affordable** tab, click the link for household's most recent certification.

Resident

Functions Data Reports

First Name: George MI D  
 Last Name: Rodriguez  
 Address: 206 Affordable Avenue 5  
 City/State/Zip: Atown SC 49480  
 Email: gr@email.com  
 Alt. Email:  
 Office:  
 Home: (843) 445-6567  
 FAX:

Resident ID: t0007027  
 Property: kn206d  
 Unit: 5  
 Prospect: p0013007  
 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

50059 Data							
Cert Type	Effective Date	Contract Rent	TTP	Util Allow.	Tenant Rent	HAP	Edit
IC	03/20/2017	1,000	394	40	354	646	View

50059 ☒ Subsidy Provider  
 Do not apply rent charges ☒  
 No Summary Receipts ☒

Link to 50059 Certification screen

The **50059 Certification** screen appears.

50059 Certification				Functions ▾	Data ▾	Reports ▾
<b>Passed Validation</b>						
<b>Resident Information</b>				<b>Ctrl#52638</b>		
Code	t0007027	Property	kn206d	Lease Sign	03/20/2017	
Name	George Rodriguez	Unit	5	Lease From	03/20/2017	
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018	
		Office	(843) 445-6567	Move In	02/06/2017	
City-State-Zip	Atown, SC 49480	Home		Move Out		
<input type="button" value="Help"/> <input type="button" value="HUD 4350.3"/>		<input type="button" value="Family Info"/>				
<div> <div>Basic</div> <div>Household</div> <div>Income and Expenses</div> <div>Previous HOH</div> <div>Notice Dates</div> </div>						
<b>Critical Dates</b> Certification Type: IC=Initial Cert ▾ Effective Date: 03/20/2017 <input type="text"/> Next Annual Recert: 03/01/2018 <input type="text"/> Project Move In: 02/06/2017 <input type="text"/> Tenant Sign Date: 03/16/2017 <input type="text"/> Owner Sign Date: 03/19/2017 <input type="text"/> HAP Voucher Date: 09/01/2017 <input type="text"/> First Voucher Date: 05/01/2017 <input type="text"/> TRACS Sent Date: 05/15/2017 <input type="text"/> Date EIV verified: 03/28/2017 <input type="text"/> <input type="button" value="Update Date EIV Verified"/>				<b>Contract Information</b> Contract Number: SC123454565 ▾ Subsidy Type: 1-Section 8 <input type="text"/> Eligibility Universe: 2-Post 1981 <input type="text"/>		
<b>Conversion Information</b> Previous Subsidy: <input type="text"/> ▾				<b>Rent/HAP Information</b> TTP Before Override: 0 <input type="text"/> TTP: 394 <input type="text"/> TR: 354 <input type="text"/> HAP: 646 <input type="text"/> FSS Escrow Credit: 0 <input type="text"/> Security Deposit: 394 <input type="text"/> Rent Override: <input type="checkbox"/>		
<b>Other Information</b> Minimum Rent Exemption: <input type="text"/> ▾ Income Exception Code: <input type="text"/> ▾ <a href="#">MAT</a> Income Verification (EIV) Required: <input checked="" type="checkbox"/> Baseline Certification: <input type="checkbox"/> Police / Security Tenant: <input type="checkbox"/> User Calculation: <input type="checkbox"/>				<b>General Information</b> Unit Code: 5 <input type="text"/> Market Rent: 1,000 <input type="text"/> Contract Rent: 1,000 <input type="text"/> 236 Basic/BMIR Rent: 0 <input type="text"/> Utility Allowance: 40 <input type="text"/>		

- 5 From the **Functions** menu in the top part of the **50059 Certification** screen on the right, select **Interim Recert**.

**Interim Recert**

The screenshot shows the '50059 Certification' screen. At the top, there are tabs for 'Functions', 'Data', and 'Reports'. The 'Functions' dropdown menu is open, showing options: 'Move Out', 'Termination', 'Interim Recert' (highlighted), 'Annual Recert', 'Initial Certification', and 'Correction'. Below the menu, there are two columns of options: '59 Quick Post Preview' and '59 Quick Post'. The main form area contains 'Resident Information' with fields for Code, Name, Address, City-State-Zip, Property, Unit, Status, Office, and Home. Below this are buttons for 'Help', 'HUD 4350.3', and 'Family Info'. At the bottom, there are tabs for 'Basic', 'Household', 'Income and Expenses', 'Previous HOH', and 'Notice Dates'. The 'Basic' tab is active, showing 'Critical Dates' and 'Contract Information' sections.

The **New Certification** screen appears.

- 6 Type or select the effective date of the interim recertification and click **Submit**.

The screenshot shows the 'New Certification' screen. It has a blue header bar with the text 'Create Interim Recertification'. Below this, there is a field for 'Interim Recertification Date' with the value '10/01/2017' and a calendar icon. At the bottom, there are two buttons: 'Submit' and 'Cancel'.

The **50059 Certification** screen appears. **IR=Interim Recert** appears in the **Certification Type** field, located on the **Basic** tab in the bottom part of the screen.

## Certification Type

50059 Certification Functions Data Reports

**Passed Validation**

**Resident Information** Ctrl#52644

Code	10007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Save Delete Help HUD 4350.3 Family Info

**Basic** **Household** **Income and Expenses** **Previous HOH** **Notice Dates**

**Critical Dates**

Certification Type IR=Interim Recert

Effective Date 10/01/2017

Next Annual Recert 03/01/2018

Project Move In 02/06/2017

Tenant Sign Date

Owner Sign Date

Extenuating Circumstances MAT

HAP Voucher Date

First Voucher Date

TRACS Sent Date

**Contract Information**

Contract Number SC123454565

Subsidy Type 1-Section 8

Eligibility Universe 2-Post 1981

**Rent/HAP Information**

TTP Before Override 0

TTP 394

TR 354

HAP 646

FSS Escrow Credit 0

Security Deposit 0

Rent Override ☐

**Other Information**

Minimum Rent Exemption

Income Exception Code MAT

Certification caused by EIV

Income Verification (EIV) Required ☐

Baseline Certification ☐

Police / Security Tenant ☐

User Calculation ☐

**General Information**

Unit Code 5

Market Rent 1,000

Contract Rent 1,000

236 Basic/BMIR Rent 0

Utility Allowance 40

- 7 In the **Other Information** section on the **Basic** tab, add the EIV information.

**Income Verification (EIV) Required**

**Yes** An EIV finding caused the needed for the recertification.

**No** An EIV finding is not the cause of the recertification.

**Income Verification (EIV) Required**

Select this check box.

HUD now required income verification through the EIV (*Enterprise Income Verification*) system.

- 8 Click the **Save** button in the top part of the **50059 Certification** screen. You are ready to begin the qualification process.

Saving the certification displays a message in the top part of the screen, on the right. The message tells you whether the family is qualified according to the family information recorded in the certification. This family is not qualified.

Displayed message

**50059 Certification** Functions Data Reports

**Failed to qualify family data**

**Resident Information** Ctrl#52644

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
City-State-Zip	Atown, SC 49480	Office	(843) 445-6567	Move In	02/06/2017
		Home		Move Out	

Save Delete Help HUD 4350.3 Family Info

Basic Household Income and Expenses Previous HOH Notice Dates

**Critical Dates**

Certification Type	IR=Interim Recert
Effective Date	10/01/2017
Next Annual Recert	03/01/2018
Project Move In	02/06/2017
Tenant Sign Date	

**Contract Information**

Contract Number	SC123454565
Subsidy Type	1-Section 8
Eligibility Universe	2-Post 1981

**Rent/HAP Information**

Clicking the link displays the reason why this family is not qualified. In our example, one of the children is 18 years of age or older as of the effective date of this certification. This person must now be an eligible student to continue to qualify as a dependent.

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**Failed Validation Description:**

Dependent must be under 18 or disabled or a full-time student.

- 9 If you display the message, close it and then close the **50059 Certification** screen. The **Resident** screen appears.

Voyager adds a link to the interim recertification on the **Resident** screen. In the next lesson, you will update the member, income, and asset information according to the household's current circumstances.

- 10 Click the **Home** button on the top menu to close the **Resident** screen and return to the **Community Manager Dashboard**.



## CHAPTER2

# 50059 Interim Recertification Qualification

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This lesson explains how to add and update member, income, asset, and household information for 50059 interim recertifications.

## Introduction to 50059 Interim Recertification Qualification

When you add an interim recertification, Voyager copies the member information from the household's most recent certification. You will use the qualification steps that you used when you initially qualified the household for move-in. You must update that information for changes that occurred since that last certification was completed. If a new person is now part of the household, you must add the information for that person. If a person is no longer a member of the household, you must delete the information for that member.

In the previous lesson, you created a new 50059 interim recertification for a HUD 50059 household. You can use the same household to continue the recertification process in this lesson. The examples in this lesson use the household for which we created interim recertification in the previous lesson.

The following graphic shows the **Resident** screen for the household used as an example in this lesson.

**Resident** Functions Data Reports

First Name: George MI D Resident ID: t0007027  
 Last Name: Rodriguez Property: kn206d  
 Address: 206 Affordable Avenue 5 Unit: 5  
 City/State/Zip: Atown SC 49480 Prospect: p0013007  
 Email: gr@email.com Status: Current  
 Office: Legal: N/A  
 Home: (843) 445-6567 Payment Method: Any  
 FAX: NSF Count: 0  
 Late Count: 0

Edit Close Help

Affordable Lease Info Deposit Info Lease Charges Other Info Personal Info

50059 Data							
Cert Type	Effective Date	Contract Rent	TTP	Util Allow.	Tenant Rent	HAP	Edit
IR <a href="#">Print</a>	10/01/2017	1,000	394	40	354	646	<a href="#">Edit</a>
IC <a href="#">Print</a>	03/20/2017	1,000	394	40	354	646	<a href="#">View</a>

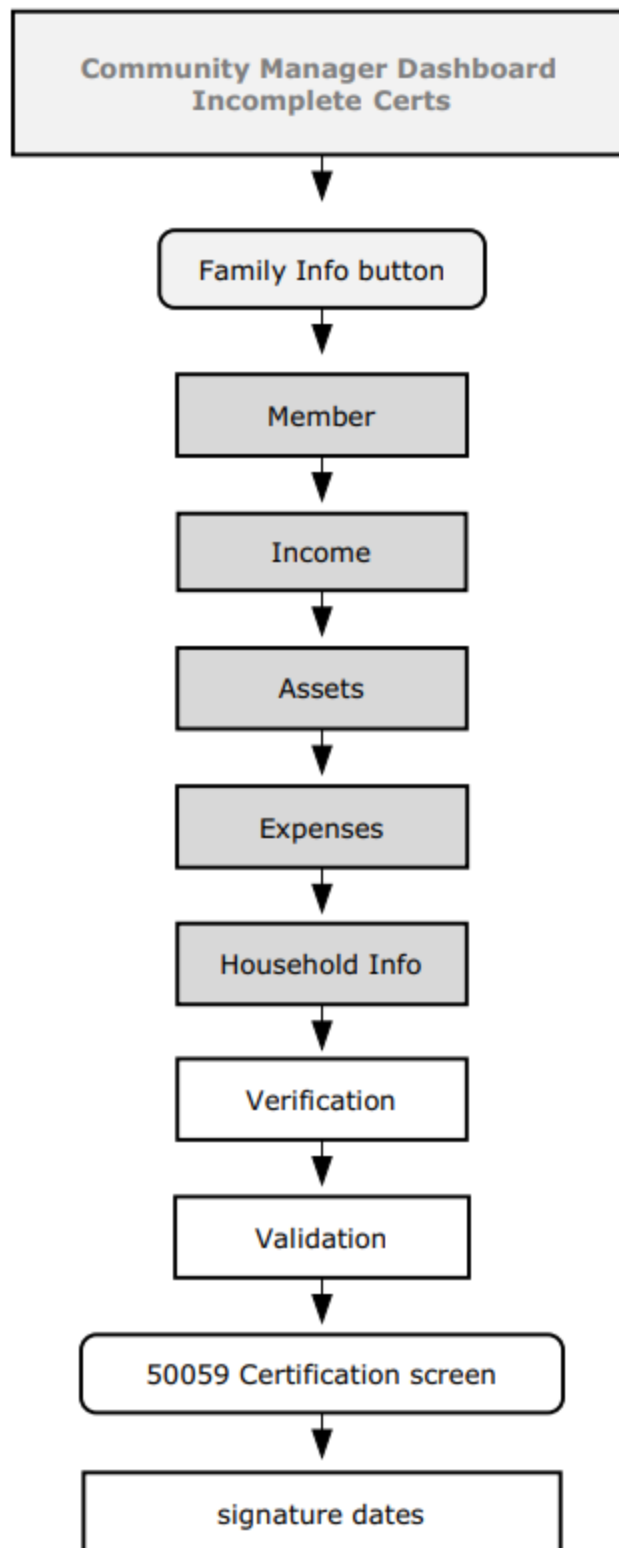
50059 ☒ Subsidy Provider  
 Do not apply rent charges ☒  
 No Summary Receipts ☒

**Interim recertification**

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

- Review information for existing household members.
- Delete all information for a household member who no longer lives in the unit.
- Add a new family member.
- Review income, asset, and expense information for existing household members.
- Add information about the new family member's income, assets, and expenses.
- Review information that applies to the entire household

The following chart shows the workflow process for a 50059 interim recertification. The shaded areas show the steps included in this lesson.



## Updating Member Information for Existing Household Members

When you create an interim recertification, Voyager adds the household to the **Incomplete Certs** list. You can access the new certification from the side menu (**50059 Functions > Review 50059**), from the **Incomplete Certs** list on the **Community Manager Dashboard**, or from the **Resident** screen.

In this lesson, we will access the certification from the **Community Manager Dashboard**.

To begin the qualification steps for a 50059 interim recertification

- 1 On the **Community Manager Dashboard**, select the property in which the household lives.
- 2 In the **Resident Activity** section of the dashboard, click the number to the right of the **Incomplete Certs** heading. The **Incomplete Certs** tab appears in the bottom part of the dashboard.

Number of incomplete certifications

Community Manager Dashboard - Affordable Avenue Apartments

Resident Activity		Unit Statistics		Friday, September 15, 2017	
Move In	0	Total Units	6		
Move Out	0	Leased Units	5	83.33%	
Deposit Accounting	0	Occupied Units	5	83.33%	
On Notice	0	Available Units	1	16.67%	
Incomplete Certs	2	Model/Down/Admin	0	0%	
Annual Certs Due	1	On Hold Units	0	0%	
Unanswered Letters	0	Unit Transfers	0		
Expiring Leases (120 days)	0				
Scheduled Lease Renewals	0				
Alerts	0				
Scheduled Roommate Promotions	0				
Maintenance		Traffic		Open Batches	
Pending Make Ready	0	Prospect Pipeline	0	Charges	New Charge Batch
Pending Work Requests	0	Today's Showings	0	Receipts	New Receipt Batch
Completed WO Followup	0	PHA Waiting Lists	0	Payables	New Payable Batch
		Pending Applications	0		

Calendar | Incomplete Certs - 09/15/2017 | Person Search

Effective Date	Unit	Name	Prog Type	Cert Type	Family Info
10/01/2017	5	George Rodriguez	59	IR	[Family Info Button]
12/01/2017	3	Elizabeth Marx	59	AR	[Family Info Button]

Interim recertification

Family Info button

- 3 On the row displaying the household for which you created the interim recertification, click the **Family Info** button.

The **IR Certification** compliance workflow screen appears. The household's resident information appears in the top part of the screen. The **Members** tab appears in the bottom part of the screen. The grid on the **Members** tab contains a row for each member included in the current certification. Voyager has automatically updated the members' ages, if needed, based on the effective date of the current certification.

**Members tab**

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

**Members** | Income | Assets | Expense | Household Info | Verification | Validation

#	Member Name	Relationship	Age	SSN	Promote to HOH	Action
1	George Rodriguez	Head	39	443-45-6567		<a href="#">Edit</a>
2	Sylvia Rodriguez	Spouse	38	445-45-6789	<a href="#">Promote</a>	<a href="#">Edit</a>
3	Davis Rodriguez	Dependent	18	545-66-5678		<a href="#">Edit</a>
4	Alicia Rodriguez	Dependent	10	567-67-8984		<a href="#">Edit</a>
						<a href="#">Add Member</a>

- 4 If you need to update information for an existing household member:
  - a Click **Edit** on the row displaying the member's name. The **Member** screen appears.
  - b Update the information, as needed.
  - c If you updated existing information and the needed letter and correspondent has changed, select the letter and correspondent for verifying the information.



In this lesson, we will not verify member information. We will select letters and correspondents later in this lesson for verifying income, assets, and expenses.

- d Click **Save**. The **Member** screen closes.
  - e Repeat these steps to update information for other household members.


## Removing Household Members from Certifications

In our example, the son has become 18 years of age and has moved out of the unit. We will need to remove his information for the interim recertification. The son was a student and not employed while he was living with his family, and he had no assets recorded on the move-in certification. We will need only to delete his member information.



If a family member no longer lives in the unit with the household and you need to delete that member, you must delete all income, asset, and expense information documented for the member before you can delete the member.

### To remove a household member from a certification

- 1 If the **IR Certification** compliance workflow screen is not open for the household that you are recertifying, open it.
  - a. In the **Resident Activity** section of the dashboard, click the number to the right of the **Incomplete Certs** heading. The **Incomplete Certs** tab appears in the bottom part of the dashboard.
  - b. On the row displaying the household for which you created the new recertification, click the **Family Info**  button. The **IR Certification** compliance workflow screen appears. The **Members** tab appears in the bottom part of the screen.

#### Members tab

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

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#	Member Name	Relationship	Age	SSN	Promote to HOH	Action
1	George Rodriguez	Head	39	443-45-6567		<a href="#">Edit</a>
2	Sylvia Rodriguez	Spouse	38	445-45-6789	<a href="#">Promote</a>	<a href="#">Edit</a>
3	Davis Rodriguez	Dependent	18	545-66-5678		<a href="#">Edit</a>
4	Alicia Rodriguez	Dependent	10	567-67-8984		<a href="#">Edit</a>
						<a href="#">Add Member</a>

- 2 On the row displaying the name of the member who is no longer living in the unit, click **Edit**. The **Member** screen appears.

Delete button

**Edit Member - IR Certification on 10/01/2017 (Ctrl 52643)**

Relationship: Dependent MAT Sex: Male

First Name: Davis Birth Date - Age: 09/06/1999 18

Middle Initial: D SSN: 545-66-5678

Last Name: Rodriguez Alien Registration:

Screening Status: Not Processed Disabled: ☐

F/T Student: ☐

Save Cancel Delete Help

**Ethnicity and Race** 50059 Data Verification Letters

**Ethnic Categories (select one)**

☐ Not of Hispanic, Latino/a, or Spanish Origin

☒ Hispanic, Latino/a, or Spanish Origin (select sub-category as well)

☐ Puerto Rican ☐ Mexican, Mexican American, Chicano/a

☒ Cuban ☐ Another Hispanic, Latino/a or Spanish Origin

☐ Declined to Report

**Racial Categories (select one or more)**

☐ American Indian or Alaska Native

☐ Asian (select sub-category as well)

☐ Asian India ☐ Chinese ☐ Filipino

☐ Japanese ☐ Korean ☐ Vietnamese

☐ Other Asian

☐ Black or African American

☐ Native Hawaiian or Other Pacific Islander (select sub-category as well)

☐ Native Hawaiian ☐ Guamanian or Chamorro

☐ Samoan ☐ Other Pacific Islander

☒ White

☐ Other

☐ Declined to Report

- Click the **Delete** button. A confirmation message appears.
- Click **OK**. Voyager deletes the information. The **Member** screen closes. The member's name no longer appears in the grid on the **Members** tab.

**IR Certification on 10/01/2017 (Ctrl 52644)**

**Resident Information**

Code: t0007027 Property: kn206d Lease Sign: 03/20/2017

Name: George Rodriguez Unit: 5 Lease From: 03/20/2017

Address: 206 Affordable Avenue 5 Status: Current Lease To: 03/20/2018

Office: (843) 445-6567 Move In: 02/06/2017

City-State-Zip: Atown, SC 49480 Home:  Move Out:

Contacts Cancel Previous Next

**Members** Income Assets Expense Household Info Verification Validation

#	Member Name	Relationship	Age	SSN	Promote to HOH	Action
1	George Rodriguez	Head	39	443-45-6567		<a href="#">Edit</a>
2	Sylvia Rodriguez	Spouse	38	445-45-6789	<a href="#">Promote</a>	<a href="#">Edit</a>
3	Alicia Rodriguez	Dependent	10	567-67-8984		<a href="#">Edit</a>
						<a href="#">Add Member</a>

## Adding New Household Members

In our example, the elderly mother of the household head has recently moved in with the family. You must include this new member in the annual recertification.

### To add a new household member

- 1 If the **IR Certification** compliance workflow screen is not open for the household that you are recertifying, open it. The **Members** tab is open in the bottom part of the screen.

The following graphic shows the **Members** tab for the interim recertification used as our example.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

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<b>Members</b>	Income	Assets	Expense	Household Info	Verification	Validation
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#	Member Name	Relationship	Age	SSN	Promote to HOH	Action
1	George Rodriguez	Head	39	443-45-6567		<a href="#">Edit</a>
2	Sylvia Rodriguez	Spouse	38	445-45-6789	<a href="#">Promote</a>	<a href="#">Edit</a>
3	Alicia Rodriguez	Dependent	10	567-67-8984		<a href="#">Edit</a>
						<a href="#">Add Member</a>

**Add Member**

- 2 Click the **Add Member** link in the bottom part of the screen. An empty **Member** screen appears.



Add New Member - IR Certification on 10/01/2017 (Ctrl 52643)

Relationship	<input type="text" value="MAT"/>	Sex	<input type="text" value=""/>
First Name	<input type="text" value=""/>	Birth Date - Age	<input type="text" value=""/> 0
Middle Initial	<input type="text" value=""/>	SSN	<input type="text" value=""/>
Last Name	<input type="text" value=""/>	Alien Registration	<input type="text" value=""/>
Screening Status	<input type="text" value="Not Processed"/>	Disabled	<input type="checkbox"/>
		F/T Student	<input type="checkbox"/>

☐ Ethnicity and Race
 ☒ 50059 Data
 ☐ Verification Letters

**Ethnic Categories (select one)**

☐ Not of Hispanic, Latino/a, or Spanish Origin  
☐ Hispanic, Latino/a, or Spanish Origin (select sub-category as well)
   
     ☐ Puerto Rican      ☐ Mexican, Mexican American, Chicano/a
   
     ☐ Cuban      ☐ Another Hispanic, Latino/a or Spanish Origin
   
☐ Declined to Report

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**Racial Categories (select one or more)**

☐ American Indian or Alaska Native  
☐ Asian (select sub-category as well)
   
     ☐ Asian India      ☐ Chinese      ☐ Filipino
   
     ☐ Japanese      ☐ Korean      ☐ Vietnamese
   
     ☐ Other Asian
   
☐ Black or African American  
☐ Native Hawaiian or Other Pacific Islander (select sub-category as well)
   
     ☐ Native Hawaiian      ☐ Guamanian or Chamorro
   
     ☐ Samoan      ☐ Other Pacific Islander
   
☐ White  
☐ Other  
☐ Declined to Report

- 3 Select the person's family relationship. For our example in which the mother of the household head is moving in, you would select **Other**. All options are listed as follows.

<b>Spouse</b>	This person is the marriage partner of the household head
<b>Dependent</b>	This person is age 17 or younger, 18 or older and disabled or a full-time student, a child temporarily absent due to placement in a foster home, a child who is subject to a joint custody agreement (lives in the unit at least 50% of time), a full-time student (regardless of age) who is away at school but who lives with the household during school breaks, or a child being adopted (or custody being sought) and currently living in the unit.
<b>Live-in</b>	This person lives in the unit but is not a member of the household. Include live-in attendants and children of live-in attendants. Review the regulatory definitions of these terms. People in this category do not have rights under the lease. People in this category are not considered members of the household and you should not count their income in determining the household's annual income.
<b>Unborn Child</b>	This person is the unborn child of an expectant mother who is a family member.
<b>CoHead</b>	This person is the co-head household but not the spouse

<b>Other</b>	This person is an adult member of the household who is not the head, spouse, co-head, foster child, or foster adult. This person has income that you are including when determining the household annual income.
<b>Foster</b>	This person is a foster child under the age of 18, the child of a foster child, or a foster adult.
<b>None of the Above</b>	The relationship of this person to the household is other than any of those listed.

**4** Complete the information in the top part of the screen.

<b>First Name</b>	Type the person's first name.
<b>Middle Initial</b>	If the person has a middle name, type the first letter of the person's middle name.
<b>Last Name</b>	Type the person's last name.
<b>Sex</b>	Select the person's gender.
<b>Birth Date - Age</b>	Type the person's date of birth and then press the TAB key. The <b>Age</b> field automatically displays the person's age.
<b>SSN</b>	Type the person's Social Security number.
<b>Alien Registration</b>	If the household member is not a citizen of the United States, type the person's alien registration identification number.
<b>Disability Status</b>	If this person is a disabled spouse, co-head of household, or dependent, select this check box. For our example, we will leave this check box clear.
<b>F/T Student</b>	<p>Complete this check box, as follows.</p> <ul style="list-style-type: none"> <li>• If this person is a dependent at least 18 years of age as of the effective date of this certification or a foster adult, and the person is a full-time student, select this check box.</li> <li>• If this person is a dependent or foster child under the age of 18 and a full-time student as of the effective date of this certification, leave this check box empty. Instead, select the <b>Eligible Student</b> check box in the <b>50059 Data</b> section of this screen. For information about the <b>Eligible Student</b> check box, see step 6.</li> </ul>

**5** On the **Ethnicity and Race** tab in the bottom part of the screen, select all check boxes that apply.

<b>Ethnic Categories (select one)</b>	<p>These check boxes identify the ethnicity of the household head.</p> <p>Select one ethnic category.</p> <p>If the selected category has sub-categories, select all sub-categories that apply.</p> <p>If you are not required to document ethnicity and the household head does not want to specify ethnicity, select <b>Declined to Report</b>.</p>
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### Racial Categories (select one or more)

These check boxes identify the race of the household head.

Select one or more racial categories.

If a selected category has sub-categories, select all sub-categories that apply.

If you are not required to document race and the household head does not want to specify race, select **Declined to Report**.

**Add New Member - IR Certification on 10/01/2017 (Ctrl 52643)**

Relationship	Other	MAT	Sex	Female
First Name	Mariella		Birth Date - Age	09/09/1939 78
Middle Initial	C		SSN	443-45-4567
Last Name	Rodriguez		Alien Registration	
Screening Status	Not Processed		Disabled	<input type="checkbox"/>
			F/T Student	<input type="checkbox"/>

Save Cancel Delete Help

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**Ethnicity and Race** 50059 Data Verification Letters

**Ethnic Categories (select one)**

☐ Not of Hispanic, Latino/a, or Spanish Origin

☒ Hispanic, Latino/a, or Spanish Origin (select sub-category as well)

☐ Puerto Rican ☐ Mexican, Mexican American, Chicano/a

☒ Cuban ☐ Another Hispanic, Latino/a or Spanish Origin

☐ Declined to Report

---

**Racial Categories (select one or more)**

☐ American Indian or Alaska Native

☐ Asian (select sub-category as well)

☐ Asian India ☐ Chinese ☐ Filipino

☐ Japanese ☐ Korean ☐ Vietnamese

☐ Other Asian

☐ Black or African American

☐ Native Hawaiian or Other Pacific Islander (select sub-category as well)

☐ Native Hawaiian ☐ Guamanian or Chamorro

☐ Samoan ☐ Other Pacific Islander

☒ White

☐ Other

☐ Declined to Report

## 6 Complete the following information on the **50059 Data** tab.

### Member Eligibility

Select the person's eligibility status:

**EC=Citizen** Eligible citizen

**EN=Elig Non-citizen** Eligible non-citizen

**IC= Inelig child** Ineligible child of a household head or spouse

**IN=Inelig Non-citizen** Ineligible non-citizen

**IP=Inelig parent** Ineligible parent of a household head or spouse

**PV=Pending Verif** Eligibility status is pending verification

**ND=Documentation not submitted** Person has not submitted documents

**XX= Non family member** Persons who are not counted under the Non-Citizen Rule

**NOTE** Foster children and foster adults are considered as family members. A membership citizenship status of **XX** is not appropriate for foster children or adults.

<b>SSN Exception</b>	<p>This field applies to a household member with no Social Security number. Clicking the arrow at the right side of the displays a list of valid Social Security number exception reasons.</p> <p>Clicking the <i>MAT link displays Chapter 5, 5.4 MAT10, Section 3: Family Record of the MAT User Guide</i>, that contains definitions of the SSN exception reasons.</p>
<b>Child Care-School/yr</b>	<p>If the person is an adult family member who uses an outside source for childcare so that the household head can attend school or look for work, type the annual cost of the childcare.</p> <p><b>NOTE</b> Do not add expenses for childcare needed so that this member can work at a current job. You will record these expenses when you document family income.</p>
<b>Joint Custody Type</b>	<p>If the person is a dependent family member who is in a joint-custody arrangement with another person who is not a member of the household, select the joint custody type that applies:</p> <p><b>JK – 50%+Occupancy – Receives Dependent Allowance</b> The dependent occupied the unit at least 50% of the certification year and was eligible for a dependent allowance.</p> <p><b>CK –50%+ Occupancy – No Dependent Allowance</b> The dependent occupied the unit at least 50% of the certification year, but the dependent was not eligible for a dependent allowance.</p> <p><b>C – Less than 50% Occupancy – No Dependent Allowance</b> The dependent occupied the unit for less than 50% of the certification year. The dependent was not eligible for a dependent allowance.</p> <p><b>NOTE</b> This field does not appear on the screen for the household head. It appears but is unavailable for adult household members.</p>
<b>Elderly</b>	<p>If this person is a spouse or co-head who will be at least 62 years of age as of this certification effective date, select this check box. In our example, the member’s family relationship is <b>Other</b>. We will leave this check box clear.</p> <p><b>NOTE</b> If the person is a household head, spouse, or co-head, and the <b>Birth Date</b> field has a date that makes the person age 62 years or older as of the certification-effective date, Voyager automatically selects the <b>Elderly</b> check box when you save the information on the <b>Member</b> screen.</p> <p>The HUD definition of “elderly” varies by housing program. For information, see <i>HUD Handbook 4350.3 REV–1, CHG–4, par. 3-16</i>, and <i>Figures 3-5 and 3-6</i>.</p>
<b>Eligible Student</b>	<p>If this person is a dependent or foster child under the age of 18 and a full-time student as of the effective date of this certification select this check box.</p>
<b>Military Veteran</b>	<p>If the person was displaced by governmental action or a disaster declared or formally recognized according to federal disaster relief laws, select this check box.</p>
<b>Displaced Person (PDD)</b>	<p>If the person was displaced by governmental action or a disaster declared or formally recognized according to federal disaster relief laws, select this check box.</p>

The following graphic shows an example of the **Member** screen completed for the family member added as our example.

**Add New Member - IR Certification on 10/01/2017 (Ctrl 52643)**

Relationship	Other	MAT	Sex	Female
First Name	Mariella	Birth Date - Age	09/09/1939	78
Middle Initial	C	SSN	443-45-4567	
Last Name	Rodriguez	Alien Registration		
Screening Status	Not Processed	Disabled	<input type="checkbox"/>	
		F/T Student	<input type="checkbox"/>	

Save Cancel Delete Help

**Ethnicity and Race** | 50059 Data | Verification Letters

Member Eligibility	EC=Citizen	Elderly	<input type="checkbox"/>
SSN Exception		Eligible Student	<input type="checkbox"/>
Child Care-School/yr	0.00	Military Veteran	<input type="checkbox"/>
Joint Custody Type		Displaced Person (PDD)	<input type="checkbox"/>

- 7 Review all information to ensure that it is correct. We will not need to verify any information for this new family member.



In this lesson, we will not verify member information. We will select letters and correspondents later in this lesson for verifying income, assets, and expenses.

- 8 When you are finished, click **Save**. The **Member** screen closes and the **IR Certification** compliance workflow screen appears. A row appears in the grid on the **Members** tab for the newly documented member.

**IR Certification on 10/01/2017 (Ctrl 52644)**

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Contacts Cancel Previous Next

**Members** | Income | Assets | Expense | Household Info | Verification | Validation

#	Member Name	Relationship	Age	SSN	Promote to HOH	Action
1	George Rodriguez	Head	39	443-45-6567		Edit
2	Sylvia Rodriguez	Spouse	38	445-45-6789	Promote	Edit
3	Alicia Rodriguez	Dependent	10	567-67-8984		Edit
4	Mariella Rodriguez	Other	78	443-45-4567	Promote	Edit
						Add Member

## Updating Information for Existing Family Income

When you add an interim recertification, Voyager automatically copies the income information from the household's most recent certification. If any of the information has changed, you must update and verify the income information. In our example, the household head has recently had a small pay raise.

### To review or update existing family income information

- 1 If the **IR Certification** compliance workflow screen is not open for the household that you are recertifying, open it. The **Members** tab is open in the bottom part of the screen.
- 2 Click the **Income** tab in the bottom part of the screen. The **Income** tab appears.

The following graphic shows the **Income** tab for the interim recertification used as our example.

#### Income tab

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Member Name	Relationship	Income Source	Income/Year	Action
George Rodriguez	Head	W-Non-Fed	9,100.00	<a href="#">Edit</a>
Sylvia Rodriguez	Spouse	W-Non-Fed	9,100.00	<a href="#">Edit</a>
				<a href="#">Add Income</a>

- 3 On the row displaying the information that you need to update, click **Edit**.

The **Income** screen appears.



A **Delete** button appears in the top part of the **Income** screen. If the family member no longer earns the income, or if the income belongs to a member who no longer lives with the household, you can click this button to delete the income information.

**NOTE** If a family member no longer lives in the unit with the household and you want to remove that member from the certification, you must delete all income, asset, and expense information documented for the member before you can delete the member record.

Edit Income - IR Certification on 10/01/2017 (Ctrl 52643)

Member	George Rodriguez	Income at current rate (365 days)	9,100.00
Income Source	W-Non-Fed	Income at new rate (0 days)	0.00
Payment Frequency	Bi-weekly	Total Annual Wage	9,100.00
Periods per year	26	Commissions, Bonuses, Tips	0.00
See File Copy for Calculation	<input type="checkbox"/>	Other Annual Amount	0.00
		<b>Total Income per year</b>	9,100.00

Current Wages	\$/Hour	Hours/Period	Total/Year
Regular Rate	350.00	1.00	9,100.00
OT1 Rate	0.00	0.00	0.00
OT2 Rate	0.00	0.00	0.00
Annual Current Income			9,100.00

- a Update the information on the **Current Wages**, **Anticipated Wages**, and **Other Information** tabs as needed.
  - b Click **Save**.
- 4 Click the **Verification** tab.

The letter and correspondent selected for the member's most recent certification appears.

**Edit Income - IR Certification on 10/01/2017 (Ctrl 52643)**

Member	<b>George Rodriguez</b>	Income at current rate (365 days)	9,360.00
Income Source	<b>W-Non-Fed</b>	Income at new rate (0 days)	0.00
Payment Frequency	<b>Bi-weekly</b>	Total Annual Wage	9,360.00
Periods per year	26	Commissions, Bonuses, Tips	0.00
See File Copy for Calculation	<input type="checkbox"/>	Other Annual Amount	0.00
		<b>Total Income per year</b>	9,360.00

**Current Wages** | **Anticipated Wages** | **Verification** | **Other Information**

Date Verified

Letter	Send To	Date Sent	Response Date	Delete
59wages	c0000177			<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Selected letter and correspondent

- a If needed, open the **Verification** tab and select a different letter and correspondent.



We will describe how to add a new correspondent when we add a new source of income, later in this lesson.

**Date Sent** and **Response Date** fields appear on each row so that you can type the date that you sent the letter and received a response. If you are printing verification letters in Voyager, leave these fields empty. You will record the sent and received dates later on the **Verification** step after you print the letters. You can concurrently record these dates for all selected member, income, asset, and expense verification letters.



Leave the **Date Verified** field empty. If your management organization requires you to complete it, complete it after receiving the response to your verification letter and confirming that all information is complete and accurate.

- b Click **Save**. The **Income** screen closes and the **IR Certification** compliance workflow screen appears.



IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

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<b>Members</b>	<b>Income</b>	<b>Assets</b>	<b>Expense</b>	<b>Household Info</b>	<b>Verification</b>	<b>Validation</b>
----------------	---------------	---------------	----------------	-----------------------	---------------------	-------------------

Member Name	Relationship	Income Source	Income/Year	Action
George Rodriguez	Head	W-Non-Fed	9,230.00	<a href="#">Edit</a>
Sylvia Rodriguez	Spouse	W-Non-Fed	9,100.00	<a href="#">Edit</a>
				<a href="#">Add Income</a>

- 5 Repeat these steps to update existing income information for other existing family members.

## Adding Information for New Income Sources

A family member may have started a second job or may have become newly employed since the last time that you certified the household. You may also need to document income for a new family member. For the household used as our example, the mother of the household head who is now living with the family receives Social Security income.

### To add new income information for a family member

- 1 If the **IR Certification** compliance workflow screen is not open for the household that you are recertifying, open it. The **Members** tab is open in the bottom part of the screen.
- 2 Click the **Income** tab in the bottom part of the screen. The **Income** tab appears.

The following graphic shows the **Income** tab for the interim recertification used as our example.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

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<b>Members</b>	<b>Income</b>	<b>Assets</b>	<b>Expense</b>	<b>Household Info</b>	<b>Verification</b>	<b>Validation</b>
----------------	---------------	---------------	----------------	-----------------------	---------------------	-------------------

Member Name	Relationship	Income Source	Income/Year	Action
George Rodriguez	Head	W-Non-Fed	9,230.00	<a href="#">Edit</a>
Sylvia Rodriguez	Spouse	W-Non-Fed	9,100.00	<a href="#">Edit</a>
				<a href="#">Add Income</a>

Add Income



- 3 Click the **Add Income** link in the bottom part of the screen. An empty **Income** screen appears.

**Add New Income - IR Certification on 10/01/2017 (Ctrl 52643)**

Member	<input type="text"/>	Income at current rate (365 days)	<input type="text" value="0.00"/>
Income Source	<input type="text"/>	Income at new rate (0 days)	<input type="text" value="0.00"/>
Payment Frequency	<input type="text"/>	Total Annual Wage	<input type="text" value="0.00"/>
Periods per year	<input type="text" value="0"/>	Commissions, Bonuses, Tips	<input type="text" value="0.00"/>
See File Copy for Calculation	<input type="checkbox"/>	Other Annual Amount	<input type="text" value="0.00"/>
		<b>Total Income per year</b>	<input type="text" value="0.00"/>

Current Wages	\$/Hour	Hours/Period	Total/Year
Regular Rate	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
OT1 Rate	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
OT2 Rate	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Annual Current Income			<input type="text" value="0.00"/>

- 4 In the top part of the screen, add the following information.

---

**Member**                      Type the name of the person who earns the income.

---

<b>Income Source</b>	<p>Select the source of this income. In our example, the source is SS-Soc Sec. All options are listed as follows.</p> <p><b>PE—Pension</b> Veterans’ or military pensions, or income from all other pensions and annuities.</p> <p><b>T—TANF</b> Income from Temporary Assistance for Needy Families</p> <p><b>SS—Soc Sec</b> Social Security income</p> <p><b>G—Gen Asst</b> Income from any general assistance sources</p> <p><b>SI—SSI</b> Supplemental Social Security income</p> <p><b>CS—Child</b> Support Child support income</p> <p><b>M—Military</b> Income from military sources</p> <p><b>F—Federal</b> Income from federal government sources</p> <p><b>W—Non-Fed</b> Salaries, wages, tips, commission, bonuses, or other income from nongovernment sources</p> <p><b>U—Unemployment</b> Income from unemployment compensation</p> <p><b>I—Indian Trust</b> Income from an established Indian trust</p> <p><b>B—Business</b> Income from business sources, including distributed profits and business net income</p> <p><b>N—Other</b> Income from any other source, such as alimony, that the member receives</p> <p><b>NOTE</b> If the person receives this income under a Social Security number that is different from the member’s own Social Security number, you would type in the SSN Claim Number field the Social Security claim number under which this family member receives the income. In our example, the person receives the income under her own Social Security number, so we will leave this field empty.</p>
<b>Payment Frequency</b>	<p>Select the rate of occurrence for the income payments. In our example, we will select Monthly. All options are listed as follows.</p> <p><b>Hourly</b> The member is paid for each hour worked.</p> <p><b>Daily</b> The member is paid for each day worked.</p> <p><b>Weekly</b> The member is paid once a week.</p> <p><b>Bi-weekly</b> The member is paid every two weeks.</p> <p><b>Semi-monthly</b> The member is paid twice each month.</p> <p><b>Monthly</b> The member is paid once each month.</p> <p><b>Annual</b> The member is paid once a year.</p> <p><b>Other</b> The member receives payment in some other type of period.</p>
<b>Pay Periods per Year</b>	<p>Voyager automatically completes this field by calculating the number of regular payment periods per year, based on the Payment Frequency field.</p> <p>If the number of payment periods differs from the number displayed, type the number of times per year that the member receives the income. For example, if the person is paid monthly and works the entire year, type 12. If the person is paid weekly and works 50 weeks per year, type 50.</p>

5 On the **Current Wages** tab, document the person's current payment and payment period.

**Regular Rate**

**\$/Hour** Type the dollar amount that the member regularly receives for each income payment period.

For example, if the payment frequency is weekly, the member is paid \$8 per hour, and you want to calculate the income at the hourly rate, you would type 8. If the payment frequency is weekly and the member receives a paycheck of \$300 each week, you would type 300.

**Hrs/Period** Type the number representing the payment period for the income that you typed in the \$/Hour field.

For example, if the payment frequency is weekly, the member works 40 hours per week, and you want to calculate the income at the hourly rate, you would type 40. If the payment frequency is weekly and the member is paid \$300 each week, you would type 1.

**OT1 Rate**

If the person receives overtime wages, complete the overtime rate and payment period.

**OT2 Rate**

If the person receives additional overtime wages at a different rate, complete the additional overtime rate and payment period.

The person's total current income appears in the bottom part of the screen.

6 Review the amount in each **Annual Current Income** field. Voyager automatically calculates these amounts, based on the **\$/Hour** and **Hours/Period** fields in each row.

7 Click the **Verification** tab.

The **Verification** tab appears in the bottom part of the screen.

8 Select a letter for verifying the member information.

Add New Income - IR Certification on 10/01/2017 (Ctrl 52643)

Member	Mariella Rodriguez	Income at current rate (365 days)	5,040.00
Income Source	SS-Soc.Sec	Income at new rate (0 days)	0.00
Payment Frequency	Monthly	Total Annual Wage	5,040.00
Periods per year	12	Commissions, Bonuses, Tips	0.00
See File Copy for Calculation	<input type="checkbox"/>	Other Annual Amount	0.00
		<b>Total Income per year</b>	5,040.00

Save Cancel Delete Help

Current Wages Anticipated Wages **Verification** Other Information

Date Verified


Add Correspondent

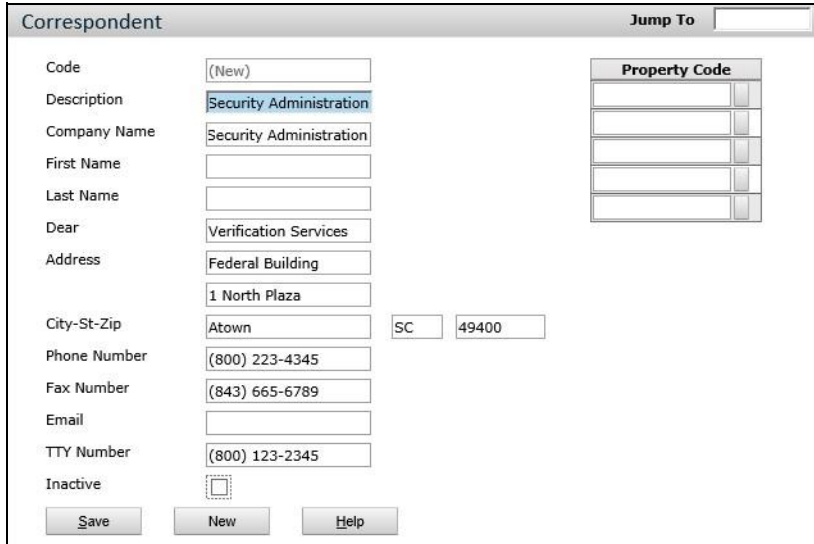
Letter	Send To	Date Sent	Response Date	Delete
59pension				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Letter button

Correspondent button


Add Correspondent button

- a Click the **Letter** button  located to the right of the first **Letter** field. A letter selection list appears.
  - b Select a letter and click **OK**. The selection list closes. The code of the selected letter appears in the **Letter** field.
- 9 Add a correspondent for the person or organization that will receive your letter.
- a Click the **Add Correspondent** button. The **Correspondent** screen appears.
  - b Complete the information for the correspondent.



Correspondent		Jump To
Code	(New)	
Description	Security Administration	
Company Name	Security Administration	
First Name		
Last Name		
Dear	Verification Services	
Address	Federal Building	
	1 North Plaza	
City-St-Zip	Atown SC 49400	
Phone Number	(800) 223-4345	
Fax Number	(843) 665-6789	
Email		
TTY Number	(800) 123-2345	
Inactive	<input type="checkbox"/>	
<input type="button" value="Save"/> <input type="button" value="New"/> <input type="button" value="Help"/>		

Property Code	
	<input type="button" value="Select"/>
	<input type="button" value="Select"/>
	<input type="button" value="Select"/>
	<input type="button" value="Select"/>
	<input type="button" value="Select"/>

- c Click **Save** and then close the **Correspondent** screen. You can now select this correspondent for the letter.
- 10 Select the correspondent that you just added.
- a Click the **Correspondent** button  to the right of the first **Send To** field. A selection list of correspondents appears.

- b Select the correspondent and then click **OK**.

The selection list closes. The code of the selected correspondent appears in the **Send To** field.

**Date Sent** and **Response Date** fields appear on each row of the **Verification** tab so that you can type the date that you sent the letter and received a response. If you are printing verification letters in Voyager, leave these fields empty. You will record the sent and received dates later on the **Verification** step after you print the letters. You can concurrently record these dates for all selected member, income, asset, and expense verification letters.



Leave the **Date Verified** field empty. If your management organization requires you to complete it, complete it after receiving the response to your verification letter and confirming that all information is complete and accurate.

- 11 Click the **Other Information** tab and add the following information.

**Occupation**

Type or select the person's occupation or trade.

**Occupation ZIP Code** Type the ZIP code in which this person works.

**SS Claim Number** If the person receives this income under a Social Security number that is *different* from the member's own Social Security number, type the Social Security claim number under which this family member receives the income. In our example, the person receives the income under his own Social Security number, so we will leave this field empty.

**Add New Income - IR Certification on 10/01/2017 (Ctrl 52643)**

Member	Mariella Rodriguez	Income at current rate (365 days)	5,040.00
Income Source	SS-Soc.Sec	Income at new rate (0 days)	0.00
Payment Frequency	Monthly	Total Annual Wage	5,040.00
Periods per year	12	Commissions, Bonuses, Tips	0.00
See File Copy for Calculation	<input type="checkbox"/>	Other Annual Amount	0.00
		<b>Total Income per year</b>	5,040.00

Save Cancel Delete Help

Current Wages Anticipated Wages Verification Other Information

<b>Income Data</b>	<b>Expense Information</b>
Occupation	Retired
Occupation Zip Code	49400
SSN Claim Number	
Care Code	
Child Care-Work/year	

**12** Review the amount in the **Total Income per year** field. Voyager calculates this amount, based on all of the information that you have added.

**Add New Income - IR Certification on 10/01/2017 (Ctrl 52643)**

Member	Mariella Rodriguez	Income at current rate (365 days)	5,040.00
Income Source	SS-Soc.Sec	Income at new rate (0 days)	0.00
Payment Frequency	Monthly	Total Annual Wage	5,040.00
Periods per year	12	Commissions, Bonuses, Tips	0.00
See File Copy for Calculation	<input type="checkbox"/>	Other Annual Amount	0.00
		<b>Total Income per year</b>	5,040.00

Save Cancel Delete Help

Current Wages Anticipated Wages Verification Other Information

Current Wages	\$/Hour	Hours/Period	Total/Year
Regular Rate	420.00	1.00	5,040.00
OT1 Rate	0.00	0.00	0.00
OT2 Rate	0.00	0.00	0.00
Annual Current Income			5,040.00

**13** If you need to alert your staff to refer to the paper files for the household or other documentation for income calculation details, click the **See File Copy for Calculation** check box.

For example, a member may have more than one anticipated change in income per year, or other circumstances may make income calculations too complex to show in accurate detail. Clicking this check box alerts you or your staff to refer to paper files or other supporting documentation for more information.

- 14** When you are finished, click **Save**. The **Income** screen closes. A row appears on the **Income** tab for the newly documented income.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	<a href="#">t0007027</a>	Property	<a href="#">kn206d</a>	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	<a href="#">5</a>	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

[Contacts](#)
[Cancel](#)
[Previous](#)
[Next](#)

<b>Members</b>	<b>Income</b>	<b>Assets</b>	<b>Expense</b>	<b>Household Info</b>	<b>Verification</b>	<b>Validation</b>
----------------	---------------	---------------	----------------	-----------------------	---------------------	-------------------

Member Name	Relationship	Income Source	Income/Year	Action
George Rodriguez	Head	W-Non-Fed	9,230.00	<a href="#">Edit</a>
Sylvia Rodriguez	Spouse	W-Non-Fed	9,100.00	<a href="#">Edit</a>
Mariella Rodriguez	Other	SS-Soc.Sec	5,040.00	<a href="#">Edit</a>
				<a href="#">Add Income</a>

## Updating Information for Existing Family Assets

When you add an interim recertification, Voyager automatically copies the asset information from the household's most recent certification. You must update the information and verify it, if needed.

In our example, the household head has an existing checking account. We will update the information for that checking account and select a verification letter for that account.



Assets are of two types:

- *Current assets* are assets that the family now owns.
- *Imputed assets* are assets that a family member sold or divested for less than fair market value within two years before the certification-effective date.

In this lesson, we will update the information for an existing current asset and add information for a new current asset. In the next part of this lesson, we will add information for an *imputed* asset.

### To update existing family asset information

- 1 If the **IR Certification** compliance workflow screen is not open for the household that you are recertifying, open it. The **Members** tab is open in the bottom part of the screen.
- 2 Click the **Assets** tab.

The **Assets** tab appears in the bottom part of the screen.

The following graphic shows the **Assets** tab for the interim recertification used as our example. It shows a checking account for the spouse.



IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	10007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Assets

Contacts Cancel Previous Next

Members Income **Assets** Expense Household Info Verification Validation

Member Name	Relationship	Description	Market Value	Annual Income	Action
Sylvia Rodriguez	Spouse	Checking	123.45	0.00	<a href="#">Edit</a>
					<a href="#">Add Asset</a>

- 3 On the row displaying the name of the member who owns the asset, click **Edit**.

The **Asset** screen appears, showing the asset value and other information as of the household's most recent certification.



A **Delete** button appears in the top part of the **Asset** screen. If the family member no longer owns the asset, or if the asset belongs to a member who no longer lives with the household, click this button to delete the asset information.

**NOTE** If a family member no longer lives in the unit with the household and you want to delete that member, you must delete all income, asset, and expense information documented for the member before you can delete the member.

Edit Asset - IR Certification on 10/01/2017 (Ctrl 52643)

Member: Sylvia Rodriguez

Description: Checking

Status: C-Current

Date Divested:

Save Cancel Delete Help

Asset Data Verification

Market Value: 123.45

Divestiture Cost: 0.00 (0 is a valid entry)

Cash Value: 123.45

Annual Interest %: 0.00 (0 is a valid entry)

Actual Income/Year: 0.00 (0 is a valid entry)

Annual asset income

- 4 Review the asset information, updating it as needed.

**Member** This field automatically displays the name of the household member identified as owning the asset. If another family member is now the owner of record, select that person.

**Market Value** Type the current market value of the asset.



**Annual Interest%** Type the interest rate percentage that the asset now earns per year. If the asset does not earn interest, type 0 (zero).

**Actual Income/Year** If you completed the **Market Value** and **Annual Interest%** fields, Voyager automatically completes this field. For assets earning income from a source other than interest, type the income per year that this asset produces. If the asset earns no income, leave this field at 0.00 (zero).

- 5 Update the other information, as needed. In our example, the checking account earns no interest.
- 6 Click the **Verification** tab.
- 7 If the verification letter and correspondent have changed since the last certification, select the letter and correspondent for verifying the information.



If you need to add a correspondent for this letter, use the steps describes in the chapter “Adding Information for New Income Sources” on page 25 to add the correspondent. After adding the correspondent, you can select the correspondent for the letter.

Edit Asset - IR Certification on 10/01/2017 (Ctrl 52643)

Member: Sylvia Rodriguez  
 Description: Checking  
 Status: C-Current  
 Date Divested:

Save Cancel Delete Help

Asset Data Verification

Date Verified:  Add Correspondent

Letter	Send To	Date Sent	Response Date	Delete
59banking	c0000054	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Selected letter and correspondent

- 8 When you are finished, click **Save**. The **Asset** screen closes and the **Assets** tab appears.
- 9 Repeat these steps to review and update information for each existing asset.

## Documenting New Current Assets

If the family acquired new assets since the last time that you certified the household, you must document that new assets. In our example, the mother of the household head has a certificate of deposit (CD) account for the proceeds of a home she recently sold. We need to add a record for that account and select a letter for verifying it.

### To document a new current asset

- 1 If the **IR Certification** compliance workflow screen is not open for the household that you are recertifying, open it. The **Members** tab is open in the bottom part of the screen.
- 2 Click the **Assets** tab in the bottom part of the screen. The **Assets** tab appears.

The following graphic shows the **Assets** tab for the interim recertification used as our example. It shows a checking account for the household head.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

<b>Members</b>	<b>Income</b>	<b>Assets</b>	<b>Expense</b>	<b>Household Info</b>	<b>Verification</b>	<b>Validation</b>
----------------	---------------	---------------	----------------	-----------------------	---------------------	-------------------

Member Name	Relationship	Description	Market Value	Annual Income	Action
Sylvia Rodriguez	Spouse	Checking	110.78	0.00	<a href="#">Edit</a> <a href="#">Add Asset</a>

Add Asset

- 3 Click the **Add Asset** link in the bottom part of the screen. An empty **Asset** screen appears.

Add New Asset - IR Certification on 10/01/2017 (Ctrl 52643)

Member   
 Description   
 Status   
 Date Divested

☐ Asset Data
 ☒ Verification

Market Value   
 Divestiture Cost  (0 is a valid entry)  
 Cash Value   
 Annual Interest %  (0 is a valid entry)  
 Actual Income/Year  (0 is a valid entry)

- 4 Add the following information in the top part of the screen.

#### Member

Select the person who owns the asset. In our example, you would select Mariella Rodriguez.

#### Description

Type or select brief description of the asset. Examples include checking accounts, savings accounts, IRA accounts, and stamp collections. In our example, the asset is for a savings account.

**Status** Select **C-Current**.

**Date Divested** For a current asset, leave this field empty.

**5** On the **Asset Data** tab, add the following information.

**Market Value** Type the market value of the asset.

**Divestiture Cost** For a current asset, leave this field at **0** (zero).

**Annual Interest%** Type the interest rate percentage that the asset earns per year. If the asset does not earn interest, type **0** (zero).

**Actual Income/Year** If you completed the **Market Value** and **Annual Interest%** fields, Voyager automatically completes this field. For assets earning income from a source other than interest, type the income per year that this asset produces. If the asset earns no income, leave this field at 0.00 (zero).

The following graphic shows an example of an asset record for a current certificate of deposit account.

Add New Asset - IR Certification on 10/01/2017 (Ctrl 52643)

Member: Mariella Rodriguez

Description: CD

Status: C-Current

Date Divested:

Save Cancel Delete Help

Asset Data Verification

Market Value: 54,500.00

Divestiture Cost: 0.00 (0 is a valid entry)

Cash Value: 54,500.00

Annual Interest %: 2.5 (0 is a valid entry)

Actual Income/Year: 1,362.50 (0 is a valid entry)

**6** Click the **Verification** tab.

**7** Select a letter for verifying the member information.

Add New Asset - IR Certification on 10/01/2017 (Ctrl 52643)

Member: Mariella Rodriguez  
 Description: CD  
 Status: C-Current  
 Date Divested:

Save Cancel Delete Help

Asset Data Verification

Date Verified:


Add Correspondent

Letter	Send To	Date Sent	Response Date	Delete
59banking	c0000054	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Add Correspondent button


Letter button

Correspondent button

- a Click the **Letter** button  located to the right of the first **Letter** field. A selection list of letters appears.
  - b Select a letter and click **OK**. The selection list closes. The code of the selected letter appears in the **Letter** field.
- 8 Select the correspondent for the letter.



If you need to add a correspondent for this letter, use the steps describes in the chapter “Adding Information for New Income Sources” on page 25 to add the correspondent. After adding the correspondent, you can select the correspondent for the letter.

- a Click the **Correspondent**  button to the right of the first **Send To** field. A selection list of correspondents appears.
- b Select the correspondent and then click **OK**. The selection list closes. The code of the selected correspondent appears in the **Send To** field.

**Date Sent** and **Response Date** fields appear on each row so that you can type the date that you sent the letter and received a response. You can also record the sent and received dates later in the **Verification** qualification step. In the **Verification** step, you can record these dates for all selected member, income, asset, and expense verification letters. In this lesson, do not type a date now. You will type the dates when you complete the **Verification** qualification step.



Leave the **Date Verified** field empty. If your management organization requires you to complete it, complete it after receiving the response to your verification letter and confirming that all information is complete and accurate.

- 9 When you are finished, click **Save**. The **Asset** screen closes. A row appears on the **Assets** tab for the newly documented asset.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	<a href="#">t0007027</a>	Property	<a href="#">kn206d</a>	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	<a href="#">5</a>	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

[Contacts](#)
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<b>Members</b>	<b>Income</b>	<b>Assets</b>	<b>Expense</b>	<b>Household Info</b>	<b>Verification</b>	<b>Validation</b>
----------------	---------------	---------------	----------------	-----------------------	---------------------	-------------------

Member Name	Relationship	Description	Market Value	Annual Income	Action
Sylvia Rodriguez	Spouse	Checking	110.78	0.00	<a href="#">Edit</a>
Mariella Rodriguez	Other	CD	54,500.00	1,362.50	<a href="#">Edit</a>
					<a href="#">Add Asset</a>

## Documenting New Imputed Assets

If a family member sold or disposed of an asset for less than fair market value within two years of the effective date of the certification, you are required to document that asset and calculate its *imputed* income. Imputed income is income that the asset would be expected to earn at the current HUD passbook savings rate if the member still owned the asset.

In our example, the mother of the household head sold her home to her daughter before moving in with her son, the household head. The fair market value of the home was \$150,000 and the selling costs were \$15,000. We will now document that asset.

### To document a new imputed asset

- 1 If the **IR Certification** compliance workflow screen is not open for the household that you are recertifying, open it. The **Members** tab is open in the bottom part of the screen.
- 2 Click the **Assets** tab in the bottom part of the screen. The **Assets** tab appears.

The following graphic shows the **Assets** tab for the interim recertification used as our example.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Members	Income	Assets	Expense	Household Info	Verification	Validation
---------	--------	--------	---------	----------------	--------------	------------

Member Name	Relationship	Description	Market Value	Annual Income	Action
Sylvia Rodriguez	Spouse	Checking	110.78	0.00	<a href="#">Edit</a>
Mariella Rodriguez	Other	CD	54,500.00	1,362.50	<a href="#">Edit</a>
					<a href="#">Add Asset</a>

Add Asset

3 Click the **Add Asset** link.

An empty **Asset** screen appears.

Add New Asset - IR Certification on 10/01/2017 (Ctrl 52643)

Member

Description

Status

Date Divested

Market Value

Divestiture Cost  (0 is a valid entry)

Cash Value

Annual Interest %  (0 is a valid entry)

Actual Income/Year  (0 is a valid entry)

4 In the top part of the screen, add the following Information, as needed.

<b>Member</b>	Select the person for whom the imputed asset applies.
<b>Description</b>	Type or select a brief description of the asset. Examples include cash gifts, real estate, shares of stock, bonds, jewelry, and stamp collections. For our example, we will type real estate.
<b>Status</b>	Select <b>I-Imputed</b>
<b>Date Divested</b>	Type the month, day, and year that the person sold or divested this asset.
<b>Market Value</b>	Type the market value of the asset.

**Divestiture Cost**

Type the total cost that the member incurred to sell or divest the asset. If the member incurred no costs, leave this field at **0.00** (zero).

Voyager automatically completes the **Cash Value** field. The cash value of the asset is the market value less the divestiture cost.

**Annual Interest%**

For an imputed asset, leave this field at **0.00** (zero). Voyager calculates the income based on the passbook interest rate defined in Voyager System Administration.

**NOTE** HUD requires property owners and management organizations to document income from an imputed asset at the HUD passbook interest rate current as of the certification effective date. Your database administrator records the HUD passbook rate on the **Affordable Options** screen in Voyager System Administration.

**Actual Inc/yr**

Voyager automatically completes the **Actual Income/year** field. The income per year is the market value multiplied by the annual interest rate percentage.

For an imputed asset, **0.00** will appear. The asset income calculated at the current HUD passbook rate appears on the printed form HUD 50059.

The following graphic shows an example of the **Asset** screen completed for an imputed real estate asset.

Add New Asset - IR Certification on 10/01/2017 (Ctrl 52643)

Member	Mariella Rodriguez	▼
Description	Real Estate	▼
Status	I-Imputed	▼
Date Divested	11/23/2016	📅

Market Value	150,000.00	
Divestiture Cost	15,000.00	(0 is a valid entry)
Cash Value	135,000.00	
Annual Interest %	0.00	(0 is a valid entry)
Actual Income/Year	0.00	(0 is a valid entry)

- 5 Click the **Verification** tab and select a letter for verifying the asset information.

Edit Asset - IR Certification on 10/01/2017 (Ctrl 52643)

Member: Mariella Rodriguez  
 Description: Real Estate  
 Status: I-Imputed  
 Date Divested: 11/23/2016

Save Cancel Delete Help

Asset Data Verification

Date Verified:


Add Correspondent

Letter	Send To	Date Sent	Response Date	Delete
59assets	c0000010			<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Letter button


Correspondent button

Add Correspondent button

- a Click the **Letter** button  located to the right of the first **Letter** field. A selection list of letters appears.
  - b Select a letter and click **OK**. The selection list closes. The code of the selected letter appears in the **Letter** field.
- 6 Select the correspondent for the letter.



If needed, click the **Add Correspondent** and use the steps described on “Adding Information for New Income Sources” on page 25 to add the correspondent needed for the letter.

- a Click the **Correspondent**  button to the right of the first **Send To** field. A selection list of correspondents appears.
- b Select the correspondent and then click **OK**. The selection list closes. The code of the selected correspondent appears in the **Send To** field.

**Date Sent** and **Response Date** fields appear on each row so that you can type the date that you sent the letter and received a response. You can also record the sent and received dates later in the **Verification** qualification step. In the **Verification** step, you can record these dates for all selected member, income, asset, and expense verification letters. In this lesson, do not type a date now. You will type the dates when you complete the **Verification** qualification step.



Leave the **Date Verified** field empty. If your management organization requires you to complete it, complete it after receiving the response to your verification letter and confirming that all information is complete and accurate.



- 7 When you are finished, click **Save**. The **Asset** screen closes and the **IR Certification** compliance workflow screen appears. A row appears on the **Assets** tab for the newly documented asset.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

[Contacts](#)
[Cancel](#)
[Previous](#)
[Next](#)

<b>Members</b>	<b>Income</b>	<b>Assets</b>	<b>Expense</b>	<b>Household Info</b>	<b>Verification</b>	<b>Validation</b>
----------------	---------------	---------------	----------------	-----------------------	---------------------	-------------------

Member Name	Relationship	Description	Market Value	Annual Income	Action
Sylvia Rodriguez	Spouse	Checking	110.78	0.00	<a href="#">Edit</a>
Mariella Rodriguez	Other	CD	54,500.00	1,362.50	<a href="#">Edit</a>
Mariella Rodriguez	Other	Real Estate	150,000.00	0.00	<a href="#">Edit</a>
					<a href="#">Add Asset</a>

## Updating Medical or Disability Expense Information

When you add an interim recertification, Voyager automatically copies the expense information from the household's most recent certification. If any of the information has changed, you must update and verify the information. In our example, the household head is disabled and has medical expenses documented in the most recent full certification. His expenses have not changed.

### To update existing medical or disability information

- 1 If the **IR Certification** compliance workflow screen is not open for the household that you are recertifying, open it. The **Members** tab is open in the bottom part of the screen.
- 2 Click the **Expenses** tab in the bottom part of the screen. The **Expenses** tab appears.
- 3 On the row displaying the information that you need to review or update, click **Edit**.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

[Contacts](#)
[Cancel](#)
[Previous](#)
[Next](#)

<b>Members</b>	<b>Income</b>	<b>Assets</b>	<b>Expense</b>	<b>Household Info</b>	<b>Verification</b>	<b>Validation</b>
----------------	---------------	---------------	----------------	-----------------------	---------------------	-------------------

Member Name	Relationship	Description	Expense/Year	Action
George Rodriguez	Head	Bus fare for work	1,620.00	<a href="#">Edit</a>
				<a href="#">Add Expense</a>

Edit

The **Expense** screen appears.

Edit Expense - IR Certification on 10/01/2017 (Ctrl 52643)

Member: George Rodriguez

Expense Type: H-Disabled

Expense Frequency: Monthly

Description: Bus fare for work

Save Cancel Delete Help

Expense Data Verification

	Expense	Period
Expense Amount	135.00	1.00
Expense per period	135.00	
Periods per year	12	
Expense/Year	1,620.00	

4 Update the information, as needed.



A **Delete** button appears in the bottom part of the **Expense** screen. If the family member no longer incurs the expense, or if the expense belongs to a member who no longer lives with the household, you can click this button to delete the expense information.

**NOTE** If a family member no longer lives in the unit with the household and you want to delete that member, you must delete all income, asset, and expense information documented for the member before you can delete the member.

5 Click the **Verification** tab.

6 If the verification letter and correspondent have changed, select the new letter and correspondent or verifying the expense information.

**Date Sent** and **Response Date** fields appear on each row so that you can type the date that you sent the letter and received a response. If you are printing verification letters in Voyager, leave these fields empty. You will record the sent and received dates later on the **Verification** step after you print the letters. You can concurrently record these dates for all selected member, income, asset, and expense verification letters.



Leave the **Date Verified** field empty. If your management organization requires you to complete it, complete it after receiving the response to your verification letter and confirming that all information is complete and accurate.

7 When you are finished, Click **Save**. The **Expense** screen closes.

8 Repeat these steps to update existing expense information for other existing family members.

## Adding Information for New Non-Reimbursed Medical or Disability Expenses

If the family is eligible medical or disability expenses, and the family has new non-reimbursed expenses, since the last time that you certified the household, you must document the new expenses. In our example, the household is eligible for expenses because the household head is disabled, and the mother of the household head has non-reimbursed medical expenses. We need to add a record for her expenses and select a letter for verifying them.

### To add information for a medical or disability expense

- 1 If the **IR Certification** compliance workflow screen is not open for the household that you are recertifying, open it. The **Members** tab is open in the bottom part of the screen.
- 2 Click the **Expense** tab in the bottom part of the screen. The **Expense** tab appears.

The following graphic shows the **Expense** tab for the interim recertification used as our example. It shows a medical expense for prescription drug co-payments.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Member Name	Relationship	Description	Expense/Year	Action
George Rodriguez	Head	Bus fare for work	1,620.00	<a href="#">Edit</a> <a href="#">Add Expense</a>

- 3 Click **Add Expense**. An empty **Expense** screen appears.

Add New Expense - IR Certification on 10/01/2017 (Ctrl 52643)

Member   
 Expense Type   
 Expense Frequency   
 Description

	Expense	Period
Expense Amount	0.00	0.00
Expense per period	0.00	
Periods per year	0	
Expense/Year	0.00	

- 4 Add the following information in the top part of the screen.

<b>Member</b>	Select family member who incurs the expense.
<b>Expense Type</b>	Select the type of expense. Options are <b>M-Medical</b> and <b>H-Disabled</b> .
<b>Expense Frequency</b>	Select the rate of occurrence for this expense.
<b>Description</b>	Type a brief description of the expense. Examples include prescription and non-prescription drugs, medical insurance premiums, payments for a mobilized wheelchair, and the actual cost of transportation to and from work or a medical appointment.

- 5 On the **Expense Data** tab, add the following information.

<b>Expense Amount</b>	<b>Expense</b> Type the dollar amount of the expense incurred each period. <b>Period</b> Type the times per period that the member incurs this expense. For example, if the expense occurs once each month and you are reporting a monthly expense, you would type 1.
<b>Periods per year</b>	Voyager automatically enters the total number of periods per year according to the expense amount and the number of periods that you entered. Change the total periods per year, if needed.

- 6 Click the **Verification** tab.

- 7 Select a letter and letter recipient (*correspondent*) for verifying the expense information.



If you need to add a correspondent for this letter, use the steps describes in the chapter “Adding Information for New Income Sources” on page 25 to add the correspondent. After adding the correspondent, you can select the correspondent for the letter.

**Date Sent** and **Response Date** fields appear on each row so that you can type the date that you sent the letter and received a response. If you are printing verification letters in Voyager, leave these fields empty. You will record the sent and received dates later on the **Verification** step after you print the letters. You can concurrently record these dates for all selected member, income, asset, and expense verification letters.



Leave the **Date Verified** field empty. If your management organization requires you to complete it, complete it after receiving the response to your verification letter and confirming that all information is complete and accurate.

- 8 Carefully review all information to ensure that it is complete and correct.

The following graphic shows an example of the **Expense** screen completed for non-reimbursable medical expense.

**Add New Expense - IR Certification on 10/01/2017 (Ctrl 52643)**

Member:

Expense Type:

Expense Frequency:

Description:

	Expense	Period
Expense Amount	80.00	1.00
Expense per period	<input type="text" value="80.00"/>	
Periods per year	<input type="text" value="12"/>	
Expense/Year	960.00	

Annual expense amount

9 Click the **Verification** tab, and select a letter and correspondent for verifying the information.

10 When you are finished, click **Save**. The **Expense** screen closes. The expense appears on the **Expense** tab.

**IR Certification on 10/01/2017 (Ctrl 52644)**

**Resident Information**

Code	<input type="text" value="t0007027"/>	Property	<input type="text" value="kn206d"/>	Lease Sign	<input type="text" value="03/20/2017"/>
Name	<input type="text" value="George Rodriguez"/>	Unit	<input type="text" value="5"/>	Lease From	<input type="text" value="03/20/2017"/>
Address	<input type="text" value="206 Affordable Avenue 5"/>	Status	<input type="text" value="Current"/>	Lease To	<input type="text" value="03/20/2018"/>
		Office	<input type="text" value="(843) 445-6567"/>	Move In	<input type="text" value="02/06/2017"/>
City-State-Zip	<input type="text" value="Atown, SC 49480"/>	Home		Move Out	

Member Name	Relationship	Description	Expense/Year	Action
George Rodriguez	Head	Bus fare for work	1,656.00	<a href="#">Edit</a>
Mariella Rodriguez	Other	presction copay	960.00	<a href="#">Edit</a>
				<a href="#">Add Expense</a>

## Reviewing and Updating Household Information

Although most of the information needed for qualifying a household applies to individual household members, some needed information applies to the household as a whole. Your final step before verification is to add this information to the household's records.

In our example, the household information has not changed.

**To review or update household information for a 50059 interim recertification**

- 1 If the **IR Certification** compliance workflow screen is not open for the household that you are recertifying, open it. The **Members** tab is open in the bottom part of the screen.
- 2 Click the **Household Info** tab in the bottom part of the screen. The **Household Info** tab appears.

The following graphic shows the **Household Info** tab for the interim recertification used as our example.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Contacts Cancel Previous Next

Members Income Assets Expense **Household Info** Verification Validation

**50059 Information**

Contract Number	SC123454565	Total Unborn Children	0
Subsidy Type	1-Section 8	Total Future Foster Children	0
Displacement Status		Total Future Adoptees	0
Previous Housing		Eligibility Check Not Required	<input type="checkbox"/> <a href="#">MAT</a>
Waiver Type	AGE - Age waiver INC - Income waiver NEAR - Near Elderly waiver	Welfare Rent	0

### 3 Review the following information, updating it as needed.

<b>Contract Number</b>	<p>The HUD contract number that applies.</p> <p>The contract number selected for the household's previous certification appears.</p>
<b>Waiver Type</b>	<p>If this household is qualifying for Section 202, Section 811 PRAC, or Section 202/162 PAC on the basis of an approved income, elderly, or other waiver, select the waiver type.</p> <p>For information about waiver types, see <i>HUD Handbook 4350.3 REV-1, CHG-4, par. 3-8</i> and the <i>MAT User's Guide, Chapter 5, field 88</i>.</p>
<b>Total Unborn Children</b>	<p>If a family member is currently pregnant, type the total number of children that she is expecting. For example, if a family member is expecting a child you would type 1</p>
<b>Total Future Foster Children</b>	<p>If the family is expecting new foster children, type the total number of foster children that will soon live with the family. For example, if the family is actively in the process of taking two foster children, you would type 2.</p>
<b>Total Future Adoptees</b>	<p>If the family is actively in the process of adopting children, type the total number of children for which adoption is in process. For example, if the family is actively in the process of adopting a child, you would type 1.</p>
<b>Eligibility Check Not Required</b>	<p>This check box applies to move-in and initial certifications created for special circumstances that do not require confirmation of citizenship status. This check box is unavailable for interim recertifications.</p> <p>Clicking the <b>MAT</b> link to the right of this field opens an online copy of the <i>MAT User's Guide, TRACS Release 2.0.2.D, 5.3 MAT10 Section 2: Basic Record</i>. It describes the situations for which you are not required to confirm eligibility.</p>

### 4 When you are finished, click the **Next** button. The **Verification** tab appears in the bottom part of the screen.

You are ready to verify the information that you have documented.

## CHAPTER3

# 50059 Interim Recertification Verification and Validation

### In this lesson

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Printing Verification Letters . . . . .	50
Recording Verification Letter Response Dates . . . . .	54
Validating Eligibility. . . . .	56

This lesson explains how to verify information that a household provides for an annual recertification and to confirm that the household is qualified after verification is complete.

## Introduction to 50059 Interim Recertification Verification

*Verification* confirms the accuracy of information that household members supply when they are qualifying for affordable housing. For an interim recertification needed for a change in circumstances, verification provides documented evidence that a household continues to qualify for the project and unit.

Affordable housing programs prefer third-party written verification.



For income verification, HUD now also requires verification through the EIV (*Enterprise Income Verification*) system.

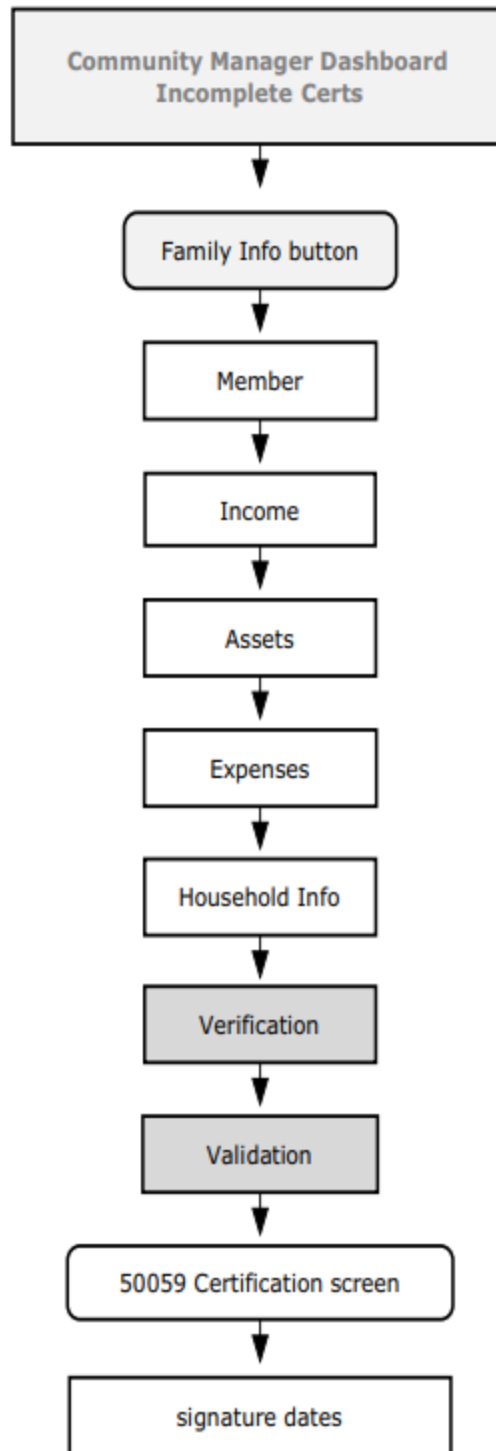
*Validation* determines whether or not a household qualifies for HUD 50059 housing based on the information that you have received and verified.

In the previous lesson, you selected letters and correspondents for verifying member, income, asset, and expense information. In this lesson, you will learn how to complete the following tasks:



- Print the verification letters that you have previously selected.
- Record verification letter-sent dates.
- Record verification letter-response dates.
- Record verification confirmation dates for family income and assets.
- Validate the household's eligibility under the household's change in circumstances.

The following chart shows the workflow process for a 50059 interim recertification. The shaded areas show the steps included in this lesson.



## Printing Verification Letters

When you documented household members, family income, and family assets for an interim recertification, you selected verification letters and correspondents (letter recipients) for verifying that information. You can print as a single procedure one letter, several letters, or all of your selected verification letters.

## To print verification letters

- 1 If the **IR Certification** compliance workflow screen is not open for the household that you are recertifying, open it. The **Members** tab is open in the bottom part of the screen.
- 2 Click the **Verification** tab. The **Verification** tab appears in the bottom part of the screen. The grid in the bottom part of the screen contains a row for each verification letter that you selected when you added the household's family member, income, asset, and expense information.

**Verification tab**

**IR Certification on 10/01/2017 (Ctrl 52644)**

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Member Name	Letter	Sent To	Date Sent	Response Date	Action
George Rodriguez	59wages	c0000177			<a href="#">Edit</a>
Sylvia Rodriguez	59wages	c0000174			<a href="#">Edit</a>
Mariella Rodriguez	59pension	c0000111			<a href="#">Edit</a>
Sylvia Rodriguez	59banking	c0000054			<a href="#">Edit</a>
Mariella Rodriguez	59banking	c0000054			<a href="#">Edit</a>
Mariella Rodriguez	59assets	c0000010			<a href="#">Edit</a>
George Rodriguez	59disabili	c0000014			<a href="#">Edit</a>
Mariella Rodriguez	59drug	c0000014			<a href="#">Edit</a>

**Letters button**

- 3 Click the **Letters** button.

- If your database is set up to use only the standard Voyager letters, the letters appear. Standard letters are Adobe PDF files.
- If your database is set up for custom Microsoft Word verification letters created with Yardi FillDocs and you have selected letters of more than one format, a **Documents to download** screen appears with links to the letters in each format. Click the link for the letter that you want to print. The letter appears.

You can use the scroll bar at the right side of the screen to view all of the verification letters.

The following graphic shows an example of a standard Voyager asset verification letter. The location and appearance of the buttons depend on your browser. In this example, the buttons appear in the bottom part of the screen.

**KN Management Corp.**  
1 Main Street  
Atown, IN 46222  
Phone: (317) 445-3457 -- TTY: (317) 665-6712

**Request for Verification of Employment**

August 28, 2017

**Steven Reynolds**  
**Reynolds Restaurant**  
**4 First Street**  
**Atown, IN 46222**

**Regarding:**  
George D. Rodriguez  
206 Affordable Avenue 5  
Atown, SC 49480

Fax:

**George D. Rodriguez** has applied for housing assistance under a program of the US Department of Housing and Urban Development (HUD). HUD requires the housing owner to verify all information that is used in determining this person's eligibility or level of benefits.

We ask your cooperation in providing the following information and returning it to the person listed at the top of the page. Your prompt return of this information will help to assure timely processing of the application for assistance. The applicant/tenant has consented to this release of information as shown below:

**Please Fax the Completed Verification to (317) 415-4567**

Date of Employment: \_\_\_\_\_ Occupation: \_\_\_\_\_

Full Time \_\_\_\_\_ or Part Time \_\_\_\_\_

Average Hours Worked Per: \_\_\_\_\_

4 When you are ready, click the printer button that appears in the bottom part of the screen. The printer dialog box for your workstation appears.

5 Complete the dialog box to select the letters that you want to print, and then print the letters.

After printing and sending the letters, you are ready to record that dates that you sent them. Voyager tracks an unanswered letter by its letter-sent date.



Tracking unanswered verification letters is critical for on-time certification completion.

Voyager tracks the number of unanswered days from the letter-sent date. After the maximum number of days pass,

Voyager adds the letter to the **Unanswered Letters** list on the **Community Manager Dashboard**. You can click the **Unanswered Letters** link on the **Community Manager Dashboard** and review letters for which you have not received responses.

### To document the date that you send verification letters

Take one of the following steps:

- If you want to document all letters as sent on the system date of your workstation, click the **Send** button. Voyager enters the system date in the **Date Sent** field for all letters on the list.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Contacts Cancel Previous Next

Members	Income	Assets	Expense	Household Info	Verification	Validation
Member Name	Letter	Sent To	Date Sent	Response Date	Action	
George Rodriguez	59wages	c0000177	08/28/2017		Edit	Letters Send
Sylvia Rodriguez	59wages	c0000174	08/28/2017		Edit	
Mariella Rodriguez	59pension	c0000111	08/28/2017		Edit	
Sylvia Rodriguez	59banking	c0000054	08/28/2017		Edit	
Mariella Rodriguez	59banking	c0000054	08/28/2017		Edit	
Mariella Rodriguez	59assets	c0000010	08/28/2017		Edit	
George Rodriguez	59disabili	c0000014	08/28/2017		Edit	
Mariella Rodriguez	59drug	c0000014	08/28/2017		Edit	

Date sent      Send button

- If you want to document a different letter-sent date for a specific letter, type the date in the **Date Sent** field for that letter.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Contacts Cancel Previous Next

Members	Income	Assets	Expense	Household Info	Verification	Validation
Member Name	Letter	Sent To	Date Sent	Response Date	Action	
George Rodriguez	59wages	c0000177			Edit	Letters Send
Sylvia Rodriguez	59wages	c0000174	08/28/2017		Edit	
Mariella Rodriguez	59pension	c0000111			Edit	
Sylvia Rodriguez	59banking	c0000054	08/23/2017		Edit	
Mariella Rodriguez	59banking	c0000054			Edit	
Mariella Rodriguez	59assets	c0000010			Edit	
George Rodriguez	59disabili	c0000014			Edit	
Mariella Rodriguez	59drug	c0000014			Edit	

Date sent

## Recording Verification Letter Response Dates

Recording the date that you receive a response to a verification letter confirms that you have received the response. Recording a response date also confirms that you have reviewed the letter and if needed updated your information so that it matches the information in the letter.

### To record response dates for verification letters

- 1 If the **Tax Credit Certification** qualification steps screen is not open for the household that you are recertifying, open it.
- 2 Select the **Verification** qualification steps. The **Verification** tab appears in the bottom part of the screen. This tab displays all of the letters that you selected when you added the family member, income, asset, and expense information for the household.
- 3 On the row displaying the verification letter for which you have received a response, click the **Edit** link.

IR Certification on 10/01/2017 (Ctrl 52644)

**Resident Information**

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Members	Income	Assets	Expense	Household Info	Verification	Validation
<b>Member Name</b>	<b>Letter</b>	<b>Sent To</b>	<b>Date Sent</b>	<b>Response Date</b>	<b>Action</b>	
George Rodriguez	59wages	c0000177	08/28/2017		<a href="#">Edit</a>	
Sylvia Rodriguez	59wages	c0000174	08/28/2017		<a href="#">Edit</a>	
Mariella Rodriguez	59pension	c0000111	08/28/2017		<a href="#">Edit</a>	
Sylvia Rodriguez	59banking	c0000054	08/28/2017		<a href="#">Edit</a>	
Mariella Rodriguez	59banking	c0000054	08/28/2017		<a href="#">Edit</a>	
Mariella Rodriguez	59assets	c0000010	08/28/2017		<a href="#">Edit</a>	
George Rodriguez	59disabili	c0000014	08/28/2017		<a href="#">Edit</a>	
Mariella Rodriguez	59drug	c0000014	08/28/2017		<a href="#">Edit</a>	

Edit links

The **Member**, **Income**, **Asset**, or **Expense** screen appears.

- 4 Carefully review the information and update it with any needed changes.
- 5 In the **Response Date** field on the row displaying the letter, type the date that you received the response.

**Edit Asset - IR Certification on 10/01/2017 (Ctrl 52643)**

Member:    
 Description:    
 Status:    
 Date Divested:

**Asset Data** **Verification**

Date Verified:

Letter	Send To	Date Sent	Response Date	Delete
59banking	c0000054	08/28/2017	09/05/2017	<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

**Date Verified** **Response Date**

- The **Income** and **Asset** screens have a **Date Verified** field for recording the date that you verified the information. If your management organization requires you to complete the **Date Verified** field, type the date that you verified the information and updated it based on the verification response.
- Click **Save**. The screen closes. The response date appears in the **Response Date** field on the **Verification** tab.

**IR Certification on 10/01/2017 (Ctrl 52644)**

**Resident Information**

Code:  Property:  Lease Sign:   
 Name:  Unit:  Lease From:   
 Address:  Status:  Lease To:   
 Office:  Move In:   
 City-State-Zip:  Home:  Move Out:

**Members** **Income** **Assets** **Expense** **Household Info** **Verification** **Validation**

Member Name	Letter	Sent To	Date Sent	Response Date	Action
George Rodriguez	59wages	c0000177	08/28/2017		<a href="#">Edit</a>
Sylvia Rodriguez	59wages	c0000174	08/28/2017		<a href="#">Edit</a>
Mariella Rodriguez	59pension	c0000111	08/28/2017		<a href="#">Edit</a>
Sylvia Rodriguez	59banking	c0000054	08/28/2017	09/05/2017	<a href="#">Edit</a>
Mariella Rodriguez	59banking	c0000054	08/28/2017		<a href="#">Edit</a>
Mariella Rodriguez	59assets	c0000010	08/28/2017		<a href="#">Edit</a>
George Rodriguez	59disabili	c0000014	08/28/2017		<a href="#">Edit</a>
Mariella Rodriguez	59drug	c0000014	08/28/2017		<a href="#">Edit</a>

**Response Date**

- Repeat these steps for each verification response that you receive.



## Validating Eligibility

Validation determines whether or not a household qualifies for HUD 50059 housing based on the information that you have received and verified.

### To validate a household's eligibility

- 1 If the **IR Certification** qualification steps screen is not open for the household that you are recertifying, open it.
- 2 Click the **Validation** tab. The **Validation** tab appears in the bottom part of the screen.
- 3 Carefully review the validation information.
  - If the household qualifies, you see a **Qualified Household** heading followed by summary information for the 50059 interim recertification.
  - If the household does not qualify, you see **Unqualified Household** and a description of the reason appears.

IR Certification on 03/01/2016 (Ctrl 163696)

**Resident Information**

Code	t0025328	Property	kn110d	Lease Sign	11/23/2015
Name	Zachary Aquayo	Unit	3A	Lease From	11/23/2015
Address	59 59th Street, 3a	Status	Current	Lease To	11/22/2016
City-State-Zip	Atown, SC 49400	Office	(843) 767-8789	Move In	11/23/2015
		Home	(843) 541-2345	Move Out	

Contacts Cancel Previous Done

Members Income Assets Expense Household Info Verification **Validation**

**50059 Summary Data**

**Qualified Household**

Certification Type	Effective Date	Contract Number	Annual Income	Adjusted Income	Subsidy Type	Income Status	TTP
IR	03/01/2016	SC334545678	\$18,569.00	\$15,846.00	1-Section 8	Very Low Income	396

50059 Form  
50059 Full Pack  
Model Lease

- 4 For this lesson, click the **Done** button in the top part of the screen. The **Community Manager Dashboard** appears. You are ready to review and complete the certification.



## CHAPTER4

# 50059 Interim Recertification Completion

### In this lesson:

Introduction to 50059 Interim Recertification Completion. . . . .	57
Reviewing an Interim Recertification before Completion . . . . .	59
Printing Certification Forms . . . . .	62
Recording Completion of a 50059 Interim Recertification . . . . .	65

This lesson explains how to complete a 50059 interim recertification after you have verified the information provided by the household and confirmed that the household is qualified.



For this lesson, you have completed the qualification steps for an interim recertification and determined that the household is qualified. You are ready to review the information and print the certification document for the household members to sign.

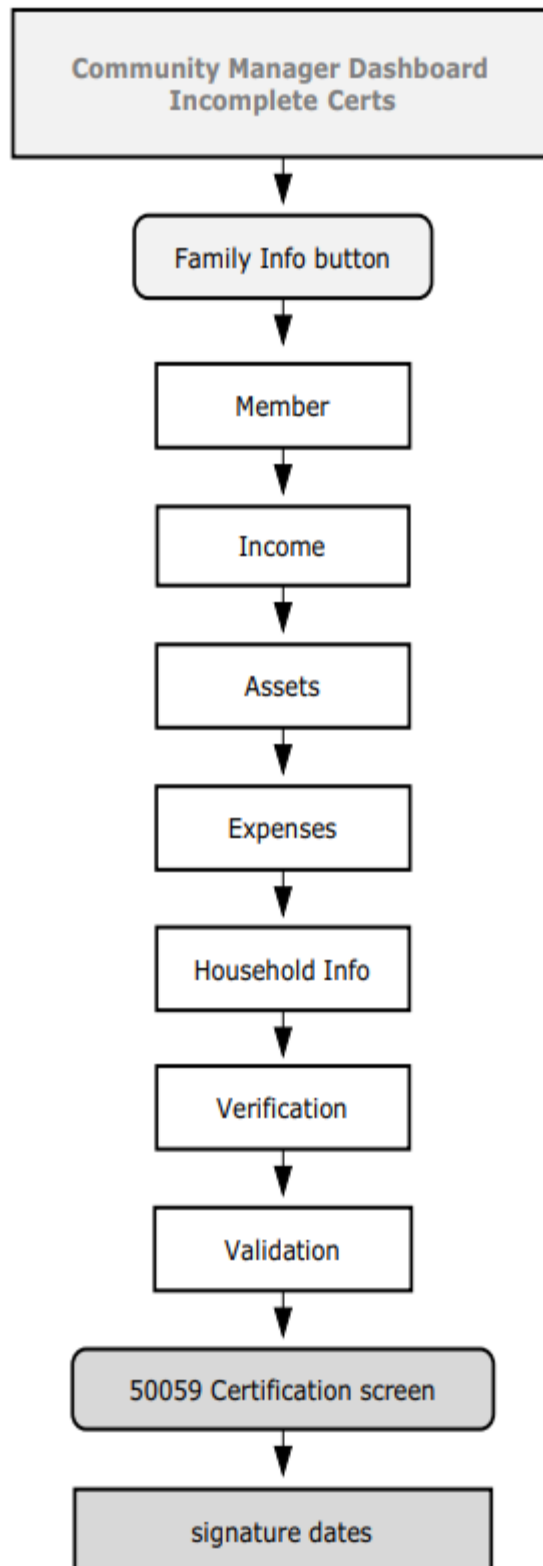
## Introduction to 50059 Interim Recertification Completion

You have created an interim recertification for a qualified household. You have completed all of the needed information, verified the information, validated the certification, and reviewed the certification information to ensure that it is complete and accurate. You are ready to complete the certification.

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

- Review a completed 50059 interim recertification.
- Print the form 50059 for property owners and household members to sign.

The following chart shows the annual recertification workflow process for HUD 50059 households. The shaded areas show the steps included in this lesson.



## Reviewing an Interim Recertification before Completion

When you have finished the qualification process for an interim recertification, the **50059** screen shows the information that will appear on the printed certification documents. Review the information to ensure that it is correct before printing copies for property owners and household members to sign.

### To review an incomplete interim recertification

- 1 In the **Resident Activity** section of the dashboard, click the number to the right of the **Incomplete Certs** heading. The **Incomplete Certs** tab appears in the bottom part of the dashboard.

The **Incomplete Certs** summary appears in the bottom part of the dashboard. The **Prog Type** field displays the type of certification that is incomplete for each resident. The **Cert Type** field displays a link to that certification.

**Incomplete Certs**

**Community Manager Dashboard - Affordable Avenue Apartments**

**Resident Activity**

Move In	0
Move Out	0
Deposit Accounting	0
On Notice	0
Incomplete Certs	2
Annual Certs Due	1
Unanswered Letters	2
Expiring Leases (120 days)	0
Scheduled Lease Renewals	0
Alerts	0
Scheduled Roommate Promotions	0

**Unit Statistics**

Total Units	6	
Leased Units	5	83.33%
Occupied Units	5	83.33%
Available Units	1	16.67%
Model/Down/Admin	0	0%
On Hold Units	0	0%
Unit Transfers	0	

**Traffic**

Prospect Pipeline	0
Today's Showings	0
PHA Waiting Lists	0
Pending Applications	0

**Calendar** | Incomplete Certs - 09/19/2017 | **Person Search**

Effective Date	Unit	Name	Prog Type	Cert Type	Family Info
10/01/2017	5	George Rodriguez	59	IR	
12/01/2017	3	Elizabeth Marx	59	AR	

- 2 On the row displaying the household for which you created the new recertification, click the **IR** link. The **50059 Certification** screen appears. The certification type is **IR=Interim Recert**.

Certification type

50059 Certification Functions Data Reports

**Passed Validation**

**Resident Information** Ctrl#52644

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Save Delete Help HUD 4350.3 Family Info

**Basic** **Household** **Income and Expenses** **Previous HOH** **Notice Dates**

**Critical Dates**

Certification Type	IR=Interim Recert
Effective Date	10/01/2017
Next Annual Recert	03/01/2018
Project Move In	02/06/2017
Tenant Sign Date	
Owner Sign Date	
Extenuating Circumstances	<span>MAT</span>
HAP Voucher Date	
First Voucher Date	
TRACS Sent Date	

**Contract Information**

Contract Number	SC123454565
Subsidy Type	1-Section 8
Eligibility Universe	2-Post 1981

**Rent/HAP Information**

TTP Before Override	0
TTP	549
TR	509
HAP	491
FSS Escrow Credit	0
Security Deposit	0
Rent Override	<input type="checkbox"/>

**Other Information**

Minimum Rent Exemption	
Income Exception Code	<span>MAT</span>
Certification caused by EIV	No
Income Verification (EIV) Required	<input type="checkbox"/>
Baseline Certification	<input type="checkbox"/>
Police / Security Tenant	<input type="checkbox"/>
User Calculation	<input type="checkbox"/>

**General Information**

Unit Code	5
Market Rent	1,000
Contract Rent	1,000
236 Basic/BMIR Rent	0
Utility Allowance	40

### 3 Review the income worksheet.

- a From the **Reports** menu in the top part of the **50059 Certification** screen, select **Income Worksheet**.

Income Worksheet

50059 Certification Functions Data Reports

**Passed Validation**

**Resident Information** Ctrl#52644

Code	t0007027	Property	kn206d	Lease Sign	03/20/2017
Name	George Rodriguez	Unit	5	Lease From	03/20/2017
Address	206 Affordable Avenue 5	Status	Current	Lease To	03/20/2018
		Office	(843) 445-6567	Move In	02/06/2017
City-State-Zip	Atown, SC 49480	Home		Move Out	

Save Delete Help HUD 4350.3 Family Info

**Basic** **Household** **Income and Expenses** **Previous HOH** **Notice Dates**

**Critical Dates**

Certification Type	IR=Interim Recert
--------------------	-------------------

**Contract Information**

Contract Number	SC123454565
-----------------	-------------

**Reports**

- Ledger
- 50059 Form
- 50059 Full Pack
- 50059 Model Lease
- Verify Preview
- Verify and Post
- Income Worksheet**
- Rent Worksheet

The 50059 - Annual Calculation Worksheet appears.

50059 - Annual Income Calculation Worksheet

Property Code: kn206d Household Name: George D. Rodriguez Certification Date: 10/01/2017  
 Property Name: Affordable Avenue Apartments Tenant Code: t0007027 Certification Type: IR  
 Unit Code: 5 Unit Size: 2 Br (Ctrl# 52644)

MemberName:	Relationship:	Gender:	DOB:	Age:	Citizenship:	Disabled	Elderly	F/T Student:	Eligible Student:	Joint Custody
George D. Rodriguez	Head	M	08/08/1978	39	EC	X				
Sylvia R. Rodriguez	Spouse	F	06/07/1979	38	EC					
Alicia B. Rodriguez	Dependent	F	07/07/2007	10	EC					
Mariella C. Rodriguez	Other	F	09/09/1939	78	EC					

Members

Member:	Source:	Frequency:	\$/Hr:	Hrs/Per:	Per/Yr:	Inc Per Yr:
George D. Rodriguez	Non-Federal Wage	Bi-Weekly	Regular \$355.00	* 1.00	* 26.00	= \$9,230.00
Sylvia R. Rodriguez	Non-Federal Wage	Weekly	Regular \$175.00	* 1.00	* 52.00	= \$9,100.00
Mariella C. Rodriguez	Social Security	Monthly	Regular \$420.00	* 1.00	* 12.00	= \$5,040.00
Total of all income Sources =						\$23,370.00

Income

Member:	Description:	Status:	Divested:	Divest Cost:	Mkt Value:	Int %:	Inc. per Yr:
Sylvia R. Rodriguez	Checking	Current		\$0.00	\$110.78	0.00 %	\$0.00
Mariella C. Rodriguez	CD	Current		\$0.00	\$54,500.00	2.50 %	\$1,362.50
Mariella C. Rodriguez	Real Estate	Imputed	11/23/2016	\$15,000.00	\$150,000.00	0.00 %	\$0.00
					\$15,000.00	\$204,611.00	\$1,362.00

Asset Calculations:

Total Annual Income:

If net total family assets exceeds \$5,000.00 you must calculate imputed income from assets at 0.06% and use the greater of actual income from assets or imputed income from assets.

Total Mkt Value:	Total Sale / Divest Cost:	Total Asset Cash Value:	Pass Book Rate %:	Total Imputed Assets:
\$204,611.00	\$15,000.00	\$189,611.00	0.06	\$113.77

\*\*Since total asset value of \$204,611.00 is more than \$5,000.00, annual income must include greater of:

Total Imputed Assets:	Total Asset Income:	Greater Asset Income:
\$113.77	\$1,363.00	\$1,363.00

Total Income	Asset Income	Total Annual Income
\$23,370.00	\$1,363.00	\$24,733.00

Assets

Current Income Status = Very Low Income (\$60,400.00)

- b Close the worksheet when you are ready.
- 4 Review the rent worksheet.
  - a From the **Reports** menu in the top part of the **50059 Certification** screen, select **Rent Worksheet**.  
 The Worksheet for Computing Total Tenant Payment and Tenant Rent (All Programs) appears.

**Income and rent  
information for Section 8,  
PRAC, PAC, and PRA Demo  
housing**

Worksheet for Computing Total Tenant Payment and Tenant Rent (All Programs)			
Name of Project Affordable Avenue Apartments	Project Number	Contract Number SC123454565	Subsidy Type Sec 8
Head of Household Rodriguez, George	Unit Number 5	Certification Type IR	Effective Date 10/01/2017
Part A. Compute the total tenant payment / tenant rent. Complete only one section. Select the section that applies to the type of subsidy the tenant will be receiving.			
<b>Section 8, RAP, PRAC, PAC and PRA Demo Tenants</b> A-1. 2,061.08 Monthly Income A-2. 1,831.58 Monthly Adjusted Income A-3. 549 30% of Monthly Adjusted Income A-4. 206.11 10% of Monthly Income A-5. 0 Welfare Rent (if applicable) Minimum Rent (Applies to Section 8 and PRA Demo only. Enter zero for all other subsidy types or if the tenant has a minimum rent exception.) A-6. 0 A-7. 1,040 Gross Rent A-8. 549 Total Tenant Payment (TTP) (Enter the largest of A3, A4, A5 and A6.)  If subsidy type is Section 8 (non-RAD), RAP, PAC or PRA Demo and TTP exceeds gross rent, the tenant may not be admitted to the program and assistance must be terminated for an existing tenant.  TTP may exceed gross rent for PRAC and Section 8 (RAD) tenants.  If subsidy type is Section 8 or RAP and the family is subject to prorated assistance for noncitizens, go to Part B.  If subsidy type is Section 8 (RAD, First Component) and the family is subject to phase-in, go to Part C.  Otherwise, the TTP calculation is complete.		<b>Section 236 Tenants - No Utility Allowance</b> A-14. Monthly Adjusted Income A-15. 30% of Monthly Adjusted Income A-16. Basic Rent A-17. Market Rent A-18. Tenant Rent (Enter the larger of A15 and A16, but never more than A17.)  If the family is subject to prorated assistance for noncitizens, go to Part B. Otherwise, the tenant rent calculation is complete.	
		<b>Section 236 Tenants with Utility Allowance</b> A-19. Monthly Adjusted Income A-20. 30% of Monthly Adjusted Income A-21. Utility Allowance A-22. A20 minus A21 A-23. Basic Rent A-24. 25% of Monthly Adjusted Income A-25. Market Rent A-26. Tenant Rent (Enter the largest of A22, A23 and A24, but never more than A25.)  If the family is subject to prorated assistance for noncitizens, go to Part B. Otherwise, the tenant rent calculation is complete.	
<b>Rent Supplement Tenants</b> A-9. Monthly Adjusted Income A-10. Gross Rent A-11. 30% of Gross Rent A-12. 30% of Monthly Adjusted Income A-13. Total Tenant Payment (TTP) (Enter the larger of A11 and A12.)  If the TTP exceeds 90% of gross rent on a move-in or initial certification, the tenant may not be admitted to the program.  If the family is subject to prorated assistance for noncitizens, go to Part B.  Otherwise, the TTP calculation is complete.		<b>BMIR Tenants - Move In or Initial Certification</b> A-27. Annual Income A-28. BMIR Income Limit A-29. BMIR Rent A-30. Tenant Rent (If A27 is less than or equal to A28, enter A29.)  If the annual income exceeds the BMIR income limit, the tenant may not be admitted to the project.	
		<b>BMIR Tenants - Recertification</b> A-31. Annual Income A-32. BMIR Income Limit A-33. 110% of BMIR Income Limit A-34. BMIR Rent A-35. 110% of BMIR Rent A-36. Tenant Rent (If A31 is larger than A33, enter A35. Otherwise enter A34.)	

Page 1

TTP/TR Worksheet (6/2017)

**b** Close the rent worksheet when you are ready.

You are ready to print copies of the certification for the property owners and all adult household members to sign.

## Printing Certification Forms

The property owners and all adult household members must sign a printed copy of an interim recertification. By signing the certification, each person is confirming that the information is complete, accurate, and represents the financial condition and composition of the household as of the certification effective date.

You can print copies of the certification when you are reviewing the **50059** screen. Print copies for property owners and all adult household members to sign.



### To print a 50059 certification from the 50059 screen

- 1 If the **50059 Certification** screen is not open, open it.
- 2 In the **Reports** field in the top part of the **50059 Certification** screen, select one of the following:

**50059** Print the form HUD 50059.

**50059 Full Pack** Print the 50059 Full Pack forms.

#### 50059 certification forms

The screenshot shows the '50059 Certification' screen. At the top, there are tabs for 'Functions', 'Data', and 'Reports'. The 'Reports' dropdown menu is open, showing options: 'Ledger', '50059 Form', '50059 Full Pack', '50059 Model Lease', 'Verify Preview', and 'Verify and Post'. On the right side of the menu, there are additional options: 'Income Worksheet' and 'Rent Worksheet'. Below the menu, the 'Resident Information' section is visible, containing fields for Code, Name, Address, City-State-Zip, Property, Unit, Status, Office, Home, Lease Sign, Lease From, Lease To, Move In, and Move Out. The 'Certification Type' is set to 'IR=Interim Recert' and the 'Contract Number' is 'SC123454565'. At the bottom, there are buttons for 'Save', 'Delete', 'Help', 'HUD 4350.3', and 'Family Info'.

The first page of your selected form or forms appear. You can use the scroll bar at the right side of the screen to review all included pages.

The following graphic shows an example of the first page of form HUD 50059. The appearance and location of the **Print** button depends on your browser. In this example, the **Print** button appears in the top part of the screen, above the displayed form.

Print button

**12/01/2016**

**Owner's Certification of Compliance with HUD's Tenant Eligibility and Rent Procedures**

U. S. Department of Housing And Urban Development  
Office of Housing  
Federal Housing Commissioner

NOT for submission to the Federal Government  
Landlord's Official Record of Certification

OMB Approval Number 2502-0204

**Section A. Acknowledgements**

Read this before you complete and sign this form HUD-50059

**Public Reporting Burden.** The reporting burden for this collection of information is estimated to average 55 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (2502-0204), Washington, DC 20503. The information is being collected by HUD to determine an applicant's eligibility, the recommended unit size, and the amount the tenant(s) must pay toward rent and utilities. HUD uses this information to assist in managing certain HUD properties, to protect the Government's financial interest, and to verify the accuracy of the information furnished. HUD or a Public Housing Authority (PHA) may conduct a computer match to verify the information you provide. This information may be released in accordance with HUD's Computer Matching Agreement (CMA) between the Social Security Administration and the Department of Health and Human Services. You must provide all of the information requested, including the Social Security Numbers (SSNs), unless exempted by 24 CFR 5.216, you, and all other household members, have and use. Giving the SSNs of all household members, unless exempted by 24 CFR 5.216, is mandatory; not providing the SSNs will affect your eligibility approval. Failure to provide any information may result in a delay or rejection of your eligibility approval.

**Privacy Act Statement.** The Department of Housing and Urban Development (HUD) is authorized to collect this information by the U.S. Housing Act of 1937, as amended (42 U.S.C. 1437 et. seq.); the Housing and Urban-Rural Recovery Act of 1983 (P.L. 98-181); the Housing and Community Development Technical Amendments of 1984 (P.L. 98-479); and by the Housing and Community Development Act of 1987 (42 U.S.C. 3543).

**Tenant(s)' Certification - I/We** certify that the information in Sections C, D, and E of this form are true and complete to the best of my/our knowledge and belief. I/We understand that I/we can be fined up to \$10,000, or imprisoned up to five years, or lose the subsidy HUD pays and have my/our rent increased, if I/we furnish false or incomplete information.

**Owner's Certification - I** certify that this Tenant's eligibility, rent and assistance payments have been computed in accordance with HUD's regulations and administrative procedures and that all required verifications were obtained.

**Warning to Owners and Tenants.** By signing this form, you are indicating that you have read the above Privacy Act Statement and are agreeing with the applicable Certification.

**False Claim Statement.** Warning: U.S. Code, Title 31, Section 3729, False Claims, provides a civil penalty of not less than \$5,000 and not more than \$10,000, plus 3 times the amount of damages for any person who knowingly presents, or causes to be presented, a false or fraudulent claim; or who knowingly makes, or causes to be used, a false record or statement, or conspires to defraud the Government by getting a false or fraudulent claim allowed or paid.

**Certification Summary from Page 2**

Name of Project	Affordable Avenue Apartments	Effective Date	10/01/2017	Certification Type	IR	Anticipated Voucher Date	10/01/2017
Head of Household	Rodriguez, George, D	Total Tenant Payment	549	Assistance Payment	491	Tenant Rent	509
Unit Number	kn206d-5	Extenuating Circumstances Code					

**Tenant Signatures**

Head of Household	Date	Other Adult	Date
Spouse / Co-Head	Date	Other Adult	Date

- 3 Review all pages of the printed form.
- 4 When you are ready to print, click the **Print** button on your screen. A **Print** dialog box appears.
- 5 Ensure that your printer settings are correct and that you have selected the number of copies that you want to print.
- 6 Print the forms.



You can also print copies from the **Resident** screen. A **Print** link appears on each row of the 50059 certification summary information that appears on the **Affordable** tab.



## Recording Completion of a 50059 Interim Recertification

Recording the dates that property owners and adult members signed a 50059 interim recertification confirms that the certification is complete and that property owners and all adult family members have signed a printed copy of the form 50059.

### To record the owner and resident signature dates on a 50059 interim recertification 1

Open the **50059 Certification** screen for the interim recertification.

The screenshot shows the '50059 Certification' screen. At the top, it says 'Passed Validation'. Below this is the 'Resident Information' section with fields for Code, Name, Address, City-State-Zip, Property, Unit, Status, Office, Home, Lease Sign, Lease From, Lease To, Move In, and Move Out. A 'Ctrl#52644' is also displayed. Below the resident information are buttons for 'Save', 'Delete', 'Help', 'HUD 4350.3', and 'Family Info'. The screen has tabs for 'Basic', 'Household', 'Income and Expenses', 'Previous HOH', and 'Notice Dates'. The 'Basic' tab is selected, showing 'Critical Dates' and 'Contract Information'. The 'Critical Dates' section includes fields for Certification Type (IR=Interim Recert), Effective Date (10/01/2017), Next Annual Recert (03/01/2018), Project Move In (02/06/2017), Tenant Sign Date, Owner Sign Date, and Extenuating Circumstances. The 'Contract Information' section includes Contract Number (SC123454565), Subsidy Type (1-Section 8), and Eligibility Universe (2-Post 1981). The 'Rent/HAP Information' section includes TTP Before Override (0) and TTP (549). A red box highlights the 'Tenant Sign Date' and 'Owner Sign Date' fields, with a label 'Signature dates' pointing to them.

- 2 In the **Tenant Sign Date** field, type the date as of which all adult residents occupying the unit signed the certification.



An **Extenuating Circumstances** field appears below the **Tenant Sign Date** field. If one or more adult residents were unable to sign the certification, select the reason.

- 3 In the **Owner Sign Date** field, type the date that the property owners signed the certification.



Carefully review the certification before recording the owner sign date. After you enter and save the owner sign date, you will be unable to make changes to the certification.

- 4 Click **Save**.

- 5 Print a copy of the completed certification for your files and then close the **50059 Certification** screen.

- 1 Add the owner and resident signature dates.

- 2 Open the **Resident** screen and review the household's new rent and HAP amounts.