Yardi Voyager
Affordable Housing
Layered 50059 and LIHTC
Waiting List 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 plug-ins, use the manual revision associated with the most recent plug-in version you use.

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

Publication Date	Document Revision	Newly Documented Software	Other Substantive Changes
4 February 2020	c	Affordable Plug-in 7.11 AffordableReports Plug-in 7.10	
12 April, 2018	b	Affordable Plug-in 7.7 AffordableReports Plug-in 7.6 TRACS Plug-in 1.2	
8 August 2017	a	Affordable Plug-in 7.4 AffordableReports Plug-in 7.3 TRACS Plug-in 1	

Contents

Introduction

About Yardi Voyager Affordable Housing

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

About the Documentation

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

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

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

You can find the latest documentation on Yardi [Client Central](#).:

https://support.yardi.com/Voyager7SProductManualList.asp

If you need help determining your log-on name and password, contact Yardi technical support.

Notes

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

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

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

CHAPTER 1

Layered HUD 50059 and LIHTC Property Waiting List Applications

This lesson explains how add applicants to the waiting list for a HUD 50059 property.

Introduction to Layered HUD 50059 and LIHTC Property Waiting List Applications

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

HUD requires detailed record keeping for households on waiting lists. LIHTC follows the waiting list rules. Voyager keeps a contact log for each household on a waiting list. Documenting every contact event that you have with a household is an important responsibility.

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

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

1   Add a prospect to a the waiting list for a property that has HUD 50059 and LIHTC assistance.

1   Add a resident to a the waiting list for a property that has HUD 50059 and LIHTC assistance.

2   Document a contact event for a household on the property's waiting list.

Adding Prospects to Layered HUD 50059 and LIHTC Property Waiting Lists

If a fully-occupied property has an open affordable housing waiting list, you can add a prospect to the property's waiting list immediately after adding the prospect's initial guest card information. A **Waiting List** button appears on the **Preferences** leasing step, the second step in the leasing workflow process.

You can also add the prospect to the waiting list at any time during the leasing or qualification workflow.

In this lesson, you will add a prospect to a waiting list on the **Preferences** leasing step.

To add a prospect to a layered HUD 50059 and LIHTC property's waiting list

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

2   Add a guest card for the household head and then click **Next** to advance to the **Preferences** leasing step.

3   Click the **Waiting List** button, located above the **Preferences** tab on the **Prospect Guest Card** screen.

Waiting List button

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

Contact Log tab →

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

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

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

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

Bedroom choices and family size

6 Click the **50059** tab.

a If this prospect requires an apartment accessible for mobility, hearing, or vision disabilities, select all appropriate check boxes.

b In the **Income Limit** field, select the household's estimated income limit.

> HUD requires you to collect this information. In a Section 8 property, 40% of new move-ins and initial certifications must be for households within the extremely-low income limit.

c If the property is a Section 236 project with a RAP contract, select in the **236/RAP Eligibility** field the status that applies to the household.

d If the property is a BMIR project or a Section 236 project with a RAP contact and the household is currently displaced, select the **Displaced** check box.

In the following graphic, the household is a family that needs a mobility accessible apartment. The household's income is estimated to be within the extremely low income limit.

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

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

8 Click the **Demographics** tab and add the demographics information for the household head:

Gender	Select **Male** or **Female**.
	If you are not required to specify gender for your waiting list and the person does not want to identify with a specific gender, select **Declined to Report**.
Ethnicity	Select the **1-Hispanic** or **2-Non-Hispanic**.
	If you are not required to specify ethnicity for your waiting list and the person does not want to disclose whether the person is Hispanic or non-Hispanic, select **0-Declined to Report**.
Race	Select all that apply.
	If you are not required to specify race for your waiting list and the person does not want to disclose racial background, select **Declined to Report**.

9 If the waiting list is set up with preferences and the prospect qualifies for preferences, click the **Preferences** tab and select all appropriate preferences.

Selected preference

10 Click **Save.** The **Contact Log** tab appears in the bottom part of the screen, showing a contact record for the household's new application. A **Position** tab also appears.

Position tab

New application contact record

11 Click the **Position** tab and review the applicant's position on the waiting list, by the applicant's choices for bedroom size. In this example, the applicant's rank is 2 for all categories on the two bedroom waiting list and 1 on the one bedroom waiting list.

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

Adding Residents to Layered HUD 50059 and LIHTC Property Waiting Lists

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

To add a resident household to a layered HUD 50059 and LIHTC property waiting list

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

2 On the **Community Manager Dashboard** screen, perform a search to find the household head.

a Click the **Person Search** tab and perform a person search to find the name of the household head.

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

The **Resident** screen appears.

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

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

- If the household had not been previously on the waiting list, the **Waiting List** screen is empty.

- If the household was previously on the waiting list, the household's contact history appears on the **Contact Log** tab. Information recorded when the household was most recently on the list appears in the top part of the **Waiting List** screen.

4 Review the following information in the top part of the screen, adding new information or making needed changes.

First Choice	Select the apartment size, in number of bedrooms, that the prospect prefers.
Second Choice	If apartments of more one size exist in the property and the resident has a second choice for number of bedrooms, select the prospect's second choice.
Third Choice	If apartments of several sizes exist in the property and the resident has a third choice for number of bedrooms, select the prospect's third choice.
Household Size	Type the number of people in the household.

Annual Income	Type the amount of the household's annual income.
Comment	Type initial remarks, if needed.
	NOTE Ensure that your comments, notes, and remarks comply with fair housing laws. Follow direction of management in your organization when adding comments.

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

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

The following graphic shows an example of a resident that was previously on the waiting list as a prospect. The household's waiting list history appears in the bottom part of the screen.

6 Click the **50059** tab and add or update the information, as needed.

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

8 If the household was not previously on the waiting list or if the household's demographics have changed, add or update the information on the **Demographics** tab.

9 If the waiting list is set up with preferences, click the **Preferences** tab.

10 Remove or select appropriate preferences.

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

New waiting list application as a resident

12 Close the **Waiting List** screen.

Documenting Waiting List Contact Events for Prospects

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

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

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

2 Perform a person search to find the household head.

    a Click the **Person Search** tab and perform a search to find the household head.

    b On the **Person Search** tab, click the name of the household head. The **Prospect Guest Card** screen appears. The selected leasing step on the guest card is the last step that you completed.

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

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

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

Type of contact   **Comment**

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

Documenting Waiting List Contact Events for Residents

Recording all contact events with a resident on a waiting list helps ensure that your waiting list continues to be current and compliant. A resident's contact log also helps keep you informed and responsive to the resident's needs.

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

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

2 Perform a person search to find the household head.

    a Click the **Person Search** tab and perform a search to find the household head.

    b On the **Person Search** tab, click the person's name. The **Resident** screen appears.

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

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

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

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

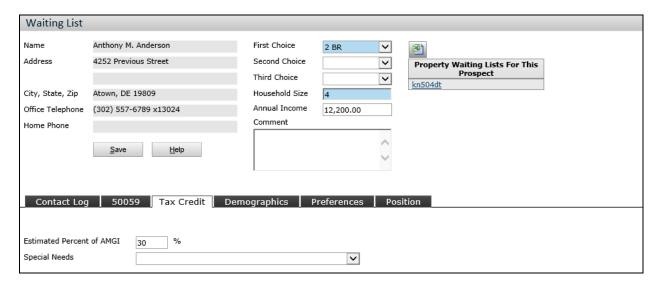**5** Click **Add to Contact Log**. Voyager adds the information to the resident's contact log.

New contact

Conclusion and Exercises

You should now be able add a household to a HUD 50059 property's waiting list. Completing the following exercises will help you to retain your new knowledge.

Exercises

1 Add a guest card for a new prospect and then add the household to the property's waiting list.

2 Document two waiting list contact events for the prospect.

3 Add a resident to the property's waiting list.

4 Document a waiting list contact event for the resident.

CHAPTER 2

Layered HUD 50059 and LIHTC Waiting List Applicant Management

In this lesson:

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

Introduction to Layered HUD 50059 and LIHTC Property Waiting List Management

Criminal background reports, failure to qualify, lack of contact, or other issues may cause the need for rejecting a household on a waiting list. Issues may cause the need to move a household to the bottom of the list. Households also may ask to be removed from a waiting list. When you take any of these actions, ensure that you adequately document the reasons.

> HUD specifically requires that you document any change, action, or activity regarding a household on a waiting list. LIHTC follows HUD rules. For information about HUD waiting list requirements, see *HUD Handbook 4350.3, REV–1, CHG–4, Chapter 4.*

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

1   Move households to the bottom of a waiting list.

2   Reject waiting list applicants.

3   Remove households from a waiting list.

Moving Households to the Bottom of a Waiting List

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

> ⚠️ If an **Additional Properties** tab appears on the **Waiting List** screen and additional properties are selected for the household, moving the household to the bottom of the waiting list for the subject property also moves the household to the bottom of the lists for the selected additional properties.
>
> If you added the household manually to the waiting lists of several properties, moving the household to the bottom of the waiting list for one property does *not* automatically move the household to the bottom of the other waiting lists.
>
> If you a keep waiting list electronically, HUD requires you to periodically print the waiting list or preserve backup copies, showing how the waiting list appeared before and after you changed a household's position on the list. Carefully follow the policies of your management organization when moving a household to the bottom of a waiting list. Clearly document the time, date, and reason. Always ensure that comments, notes, or remarks comply with fair housing laws.

To move a household to the bottom of a waiting list

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

2 Perform a person search to find the household head.

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

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

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

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

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

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

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

Contact type

5 Click **Add to Contact Log**.

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

Waiting list contact type   Waiting list status

Rejecting Prospects on a Waiting List

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

If your management organization set up the waiting list with an **Additional Properties** tab, and you selected additional properties for the prospect when you added the prospect to the waiting list, rejecting the prospect from this waiting list rejects the prospect from the waiting list for the additional properties.

To reject an applicant on a waiting list

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

2   Perform a person search to find the household head.

   a   Click the **Person Search** tab and perform a person search to find the household head.

   b   On the **Person Search** tab, click the person's name. The **Prospect Guest Card** screen appears.

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

3   On the **Contact Log** tab, complete following fields:

Contact Date	Type or select the date on which you are rejecting the applicant from the waiting list.
Contact Time	Select the time at which you are rejecting the applicant from the waiting list.
Type of Contact	Select **Application Rejected**.
Rejection Reason	Type or select the reason for the rejection.
	NOTE If you are manually typing the reason, ensure that your comments, notes, and remarks comply with fair housing laws. Follow the policies of your management organization when adding comments.

Type of contact   Reason for rejection

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

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

Denying Waiting List Applicants Assigned to Apartments

If you deny a prospect after assigning an apartment to the prospect, Voyager automatically removes prospect from the property's waiting list. You do not need to manually process the removal.

In the following graphic, the Brown household is at the top of the waiting list. After assigning the household to an apartment, the management organization needs to deny the household.

Calendar	Waiting List Details - 01/23/2020	Person Search

HUD Rank	HUD ELI Rank	TC Rank	Prospect Property	Name and Address	BR Size Pref	Effective Date	Effective Time	Household Size	Comment	Pr
1	1	1	kn504dt	Harold S. Brown 42 Previous Street Atown, DE 19809 Home: (302) 435-4123 Office: (302) 558-7687 Cell: (302) 547-7678	1BR-First Choice	03/16/2017	8:00 AM	1		Disabled
2	2	2	kn504dt	Robert J. Jaffe 34 Oldtown Avenue Atown, DE 19890 Home: (302) 443-4565 Office: (302) 445-6588 Cell: (302) 667-7867	1BR-Second Choice	06/27/2017	3:15 PM	3		Disabled
3	3	3	kn504dt	Susan N. Williams 543, Oldtown Avenue Atown, DE 19890 Office: (302) 554-5676 Cell: (186) 556-7678	1BR-First Choice	09/03/2017	10:15 AM	1		Disabled
4	4	4	kn504dt	Erika R. Trent 5 Previous Street, Unit 2A Atown, DE 19809	1BR-First Choice	03/16/2017	9:30 AM	2		Homeles

To deny a waiting list applicant assigned to an apartment

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

2 Click the **Person Search** tab and perform a search to find the household head.

   a Click the person's name. The **Prospect Guest Card** screen appears. The **Leasing Steps** menu appears in the top part of the screen, on the right.

   b If needed, click **Application Status** on the **Leasing Steps** menu. the **Application Status** tab appears in the bottom part of the screen.

The following graphic shows the **Application Status** screen on the **Leasing Steps** menu. The household is assigned to apartment unit 8.

Assigned apartment   Application Status

Deny button

3 Click the **Deny** button. The **Deny Application** screen appears.

4 Select the denial date, time, agent, and reason for denial.

5 If needed, type comments or remarks for the household's waiting list contact log.

⚠️ Always ensure that waiting list comments, notes, or remarks comply with fair housing laws. Follow the policies of your management organization when adding comments.

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

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

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

HUD Rank	HUD ELI Rank	TC Rank	Prospect Property	Name and Address	BR Size Pref	Effective Date	Effective Time	Household Size	Comment	Pro
1	1	1	kn504dt	Robert J. Jaffe 34 Oldtown Avenue Atown, DE 19890 Home: (302) 443-4565 Office: (302) 445-6588 Cell: (302) 667-7867	1BR-Second Choice	06/27/2017	3:15 PM	3		Disabled,
2	2	2	kn504dt	Susan N. Williams 543, Oldtown Avenue Atown, DE 19890 Office: (302) 554-5676 Cell: (186) 556-7678	1BR-First Choice	09/03/2017	10:15 AM	1		Disabled
3	3	3	kn504dt	Erika R. Trent 5 Previous Street, Unit 2A Atown, DE 19809 Home: (302) 554-5676 Office: (302) 223-4345	1BR-First Choice	03/16/2017	9:30 AM	2		Homeless
4	4	4	kn504dt	Lorena R. Gerome 1 Previous Street Atown, DE 19809 Office: (302) 443-1564 Cell: (302) 446-5678	1BR-Second Choice	07/02/2017	9:00 AM	2		
				Renee W. Wiles						

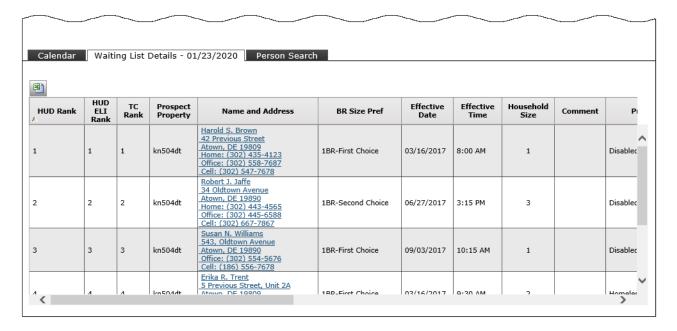Tabs: Calendar | Waiting List Details - 01/31/2020 | Person Search

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

Removing Households from a Waiting List

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

- A prospect may not respond to a request for an eligibility interview.

- A resident waiting for a unit transfer may decide to remain in its present unit.

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

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

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

> ⚠️
> If you a keep waiting list electronically, HUD requires you to periodically print the waiting list or preserve backup copies, showing how the waiting list appeared before and after you removed a household from the list. When you remove a household from a waiting list, clearly document the reasons and the time and date of that action.
>
> Carefully follow the policies of your management organization when removing a household from a waiting list. Clearly document the time, date, reason of that action. Always ensure that comments, notes or remarks comply with fair housing laws.

To remove a household from a waiting list

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

2 Click the **Person Search** tab and perform a person search to find the household head. On the **Person Search** tab, click the person's name.

- If the person is a prospect, the **Prospect Guest Card** screen appears. Click the **Waiting List** button. The **Waiting List** screen appears.

- If the person is a resident, the **Resident** screen appears. From the **Data** menu in the top part of the **Resident** screen, select **Affordable Waiting List**. The **Waiting List** screen appears.

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

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

4 Click **Add to Contact Log**.

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

Waiting list contact type   Waiting list status

Conclusion and Exercises

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

Exercises

1 Move a prospect household to the bottom of a property's waiting list.

2 Reject a household that is on a waiting list.

3 Deny a waiting-list household that is assigned to an apartment.

4 Remove a household from a property's waiting list.

CHAPTER 3

Layered HUD 50059 and LIHTC Property Waiting List Management

This lesson explains how to review Voyager affordable housing waiting lists and waiting list reports.

Introduction to Layered HUD 50059 Property Waiting List Management

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

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

> HUD 50059 regulations require that you document any change, action, or activity regarding a household on a waiting list. For information about HUD waiting list requirements, see *HUD Handbook 4350.3, REV–1, CHG–4, Chapter 4.*

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

1   Review an affordable housing waiting list.

2   Review waiting list information for a prospect.

3   Review waiting list information for a resident.

4   Generate waiting list reports.

Reviewing Waiting Lists for Layered HUD 50059 and LIHTC Properties

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

For example:

- If a waiting list contains only households requesting one-bedroom apartments, or only households requesting two-bedroom apartments, the number 1 will appear to the right of the heading. Clicking the number displays one waiting list.

- If a waiting list contains households requesting two-bedroom apartments and households requesting three-bedroom apartments, or requesting one-bedroom apartments and three-bedroom apartments, the number 2 will appear to the right of the heading. Clicking the number displays two waiting lists, one for each bedroom size that households on the list have requested.

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

Voyager gives waiting list priority to HUD 50059 households, as follows.

1   Displaced households (applies only to BMIR and Section 236).

2   Households eligible for RAP Assistance (applies only to Section 236/RAP).

3   Households that would pay less than Section 236 market-rate rent (applies only to 236/RAP.)

4   Households that would pay Section 236 market-rate rent (applies only to 236/RAP).

5   Households with HUD preferences. (Voyager uses the total weight of the household's selected preferences.)

6   Households by the earliest waiting list application date.

To review the waiting list for a layered HUD 50059 and LIHTC property

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

2   In the **Traffic** section of the dashboard, click the number for **Affordable Waiting Lists**.

The **Affordable Waiting Lists** tab appears in the bottom part of the screen. The list is sorted by the number of bedrooms requested by households on the list. A row appears for each bedroom size. The **Number on List** field displays the number of households on the waiting list for that bedroom size. The numbers are links to the waiting list details.

Number of people on each list

List by number of bedrooms

Waiting list sorted by bedroom size

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

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

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

LIHTC sort order

HUD sort order

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

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

The **HUD Rank** and **HUD ELI Rank** columns show the HUD 50059 sort order.

> The **HUD ELI Rank** column includes only households within the HUD extremely low income limit. If a property has a Section 8 contract, HUD requires income targeting; 40% of the residents with move-in or initial certifications must be within the HUD extremely low income limit. A tenant selection plan must specify the HUD-approved method that the property owners use to achieve this goal.

The **TC Rank** column shows the LIHTC sort order.

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

Reviewing or Updating Waiting List Information for Prospects

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

To review or update a prospect's waiting list information

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

2   Perform a person search to find the household head.

3   Click the person's name. The **Prospect Guest Card** screen appears. The selected leasing step on the guest card is the last step that you completed for the household.

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

5   Review the information. If needed, add additional comments or a new contact event.

6   When you are finished, close the **Waiting List** screen and then close the **Prospect Guest Card** screen.

> If the waiting list is short, you can find and review a prospect's waiting list information on the **Community Manager Dashboard** screen.
>
> **1** In the **Traffic** section, click the number for **Affordable Waiting Lists**. The **Affordable Waiting Lists** tab appears in the bottom part of the screen.
>
> **2** Click the **Number on List** for the waiting list that you want to review. The **Waiting List Details** tab appears.
>
> **3** Click the name of the person that you want to review. The **Prospect Guest Card** screen appears.
>
> 4. Click the **Waiting List** button on the **Prospect Guest Card** screen.

Reviewing and Updating Waiting List Information for Residents

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

To review or update a resident's waiting list information

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

2   Perform a person search to find the household head.

3   Click the person's name. The **Resident** screen appears.

4   From the **Data** menu on the **Resident** screen, click the **Affordable Waiting List**. The **Waiting List** screen appears.

5   Review the information. If needed, add additional comments or a new contact event.

6   When you are finished, close the **Waiting List** screen.

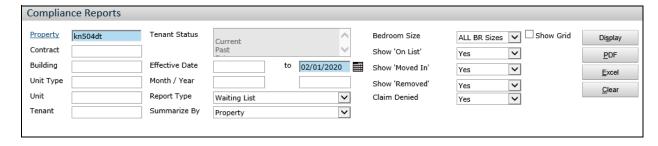# Generating HUD 50059 Property Waiting List Reports

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

• Waiting list reports show households on a property's waiting list as of a specified date.

• Waiting list history reports show waiting list information within a selected date range.

After displaying a report, you can save or print it as an Excel or PDF file.

To generate an affordable housing Waiting List or Waiting List Demographics report

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

2 Click the **Monthly Procedures** button in the top part of the screen. The **Affordable Monthly Procedures** menu appears. The **Reports** column appears on the right side of the screen.

3 Under the **Analytics Reports** heading, click **Compliance Reports**. The filter section of the **Compliance Reports** screen appears.
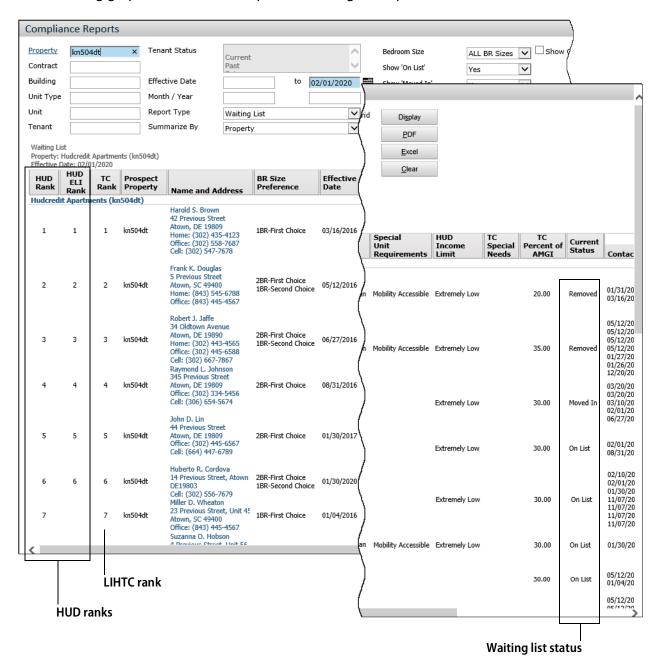
4 Complete the filter,

Report Type	Select the waiting list report that you want to review **Waiting List** Omits race, gender, and ethnicity information. **Waiting List Demographics** Includes race, gender, and ethnicity information.
Property	The code of the property selected on the **Community Manager Dashboard** screen appears. If needed, type or select a different property code.
Effective Date	Type or select the starting date for the report. The report will include all households added to the list on or after your selected date.
Bedroom Size	Select the number of bedrooms for which you want to produce the list.
Show 'On List'	• If you want to include households on the waiting list as of your selected effective date, select **Yes**. • If you want to exclude people who were on the list, select **No**.
Show 'Removed'	• If you want to include households that have been removed from the waiting list as of your selected effective date, select **Yes**. • If you want to exclude people who were on the list, select **No**.
Show 'Moved In'	• If you want to include households that had moved in as of your selected effective date, select **Yes**. • If you want to exclude people who were on the list, select **No**.
Show Grid	If you want to display column-separator lines on the report, select this check box.

5 Click **Display**. The report appears.

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

LIHTC rank

HUD ranks

Waiting list status

Conclusion and Exercises

You should now be able review waiting list information a prospect or resident, review the waiting list for a HUD 50059 property, and generate a waiting list report. Completing the following exercises will help you to retain your new knowledge.

Exercises

1 Review waiting list information for a prospect.

2 Review waiting list information for resident.

3 Review a property's waiting list.

4 Generate a waiting list report for the property.