

Documentation and Online Help

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Document Changes

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

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

Publication Date	Document Revision	Newly Documented Software	Other Substantive Changes
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	

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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 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/Voyager7SPProductManualList.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

In this lesson:

Introduction to Layered HUD 50059 and LIHTC Property Waiting List Applications	1
Adding Prospects to Layered HUD 50059 and LIHTC Property Waiting Lists	2
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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.

The screenshot shows the 'Prospect Guest Card' interface. The top section contains personal and contact information for Huberto Cordova, including address, phone numbers, and email. The middle section shows leasing details like status (Prospect), code (p0048142), property (kn504dt), agent (Fred Flanders), and date (01/31/2020). On the right, a 'Leasing Steps' sidebar lists various steps, with 'Preferences' currently selected. Below the main form, there are buttons for 'Contacts', 'Waiting List', 'Previous', 'Next', and 'Help'. The 'Waiting List' button is highlighted with a red box and an arrow pointing to it from the label 'Waiting List button' below the screenshot. The bottom section shows the 'Preferences' tab with fields for 'Expected Move In', 'Bedrooms', and 'Desired Rent', along with an 'Amenity Preferences' section.

Waiting List button



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

The screenshot shows the 'Waiting List' application interface. At the top, there's a header 'Waiting List'. Below it, a form contains prospect details: Name (Huberto R. Cordova), Address (14 Previous Street, Atown, DE19803), Office Telephone, Home Phone, First Choice (dropdown), Second Choice (dropdown), Third Choice (dropdown), Household Size (0), Annual Income (0.00), and a Comment field. To the right, a box titled 'Property Waiting Lists For This Prospect' shows 'kn504dt'. Below the form are 'Save' and 'Help' buttons. At the bottom, a tabbed interface shows 'Contact Log' as the active tab, with other tabs for '50059', 'Tax Credit', 'Demographics', and 'Preferences'. The 'Contact Log' section includes fields for Contact Date, Contact Time, Type of Contact, and a Comment field, with an 'Add to Contact Log' button. Below this is a table with columns: Edit, Date, Time, Type of Contact, Comment, Status, Added By, and Edited By.

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

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

Waiting List

Name: Huberto R. Cordova

Address: 14 Previous Street

City, State, Zip: Atown DE19803

Office Telephone:

Home Phone:

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

First Choice: 2 BR


Second Choice: 1 BR

Third Choice:

Household Size: 4

Annual Income: 0.00


Comment:


 **Property Waiting Lists For This Prospect**

[kn504dt](#)

Contact Log | 50059 | Tax Credit | Demographics | Preferences

New Application

Contact Date: 01/30/2020 

Contact Time: 11:15 AM 

Type of Contact: New Application


Comment:

[Add to Contact Log](#)

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

6 Click the **50059** tab.

Waiting List

Name	Huberto R. Cordova	First Choice	2 BR	 Property Waiting Lists For This Prospect kn504dt
Address	14 Previous Street	Second Choice	1 BR	
	Atown	Third Choice		
City, State, Zip	DE19803	Household Size	4	
Office Telephone		Annual Income	0.00	
Home Phone		Comment		

Save Help

50059 tab → **Contact Log** | **50059** | Tax Credit | Demographics | Preferences

☐ Requires Mobility Accessible Unit Income Limit

☐ Requires Visually Accessible Unit 236/RAP Eligibility

☐ Requires Hearing Accessible Unit ☐ Displaced

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.

Waiting List

Name	Huberto R. Cordova	First Choice	2 BR	 Property Waiting Lists For This Prospect kn504dt
Address	14 Previous Street	Second Choice	1 BR	
	Atown	Third Choice		
City, State, Zip	DE19803	Household Size	4	
Office Telephone		Annual Income	0.00	
Home Phone		Comment		

Save Help

Contact Log | **50059** | Tax Credit | Demographics | Preferences

☒ Requires Mobility Accessible Unit Income Limit **Extremely Low**

☐ Requires Visually Accessible Unit 236/RAP Eligibility

☐ Requires Hearing Accessible Unit ☐ Displaced

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.	

Waiting List

NameHuberto R. Cordova
Address14 Previous Street
Atown
City, State, ZipDE19803
Office Telephone
Home Phone

First Choice2 BR
Second Choice1 BR
Third Choice
Household Size4
Annual Income0.00
Comment



Property Waiting Lists For This Prospect

kn504dt

Save

Help

Contact Log50059Tax CreditDemographicsPreferences

Estimated Percent of AMGI30 %

Special Needs

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

Gender	<p>Select Male or Female.</p> <p>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.</p>
Ethnicity	<p>Select the 1-Hispanic or 2-Non-Hispanic.</p> <p>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.</p>
Race	<p>Select all that apply.</p> <p>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.</p>

Waiting List

Name

Huberto R. Cordova

Address

14 Previous Street

City, State, Zip

Atown

DE19803

Office Telephone

Home Phone

Save

Help

First Choice

2 BR

Second Choice

1 BR

Third Choice

Household Size

4

Annual Income

0.00

Comment

Property Waiting Lists For This Prospect

kn504dt

Contact Log

50059

Tax Credit

Demographics

Preferences

Gender

Male

Ethnicity

1-Hispanic

Race (Choose all that apply)

☒ White
☐ Black
☐ Native American
☐ Asian
☐ Pacific Islander
☐ Other
☐ Declined to Report

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

Waiting List

Name: Huberto R. Cordova
Address: 14 Previous Street
Atown
City, State, Zip: DE19803
Office Telephone:
Home Phone:

First Choice: 2 BR
Second Choice: 1 BR
Third Choice:
Household Size: 4
Annual Income: 0.00
Comment:

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

Property Waiting Lists For This Prospect
[kn504dt](#)

Selected preference

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

Contact Log | **50059** | **Tax Credit** | **Demographics** | **Preferences**

- 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.

Waiting List

Name: Huberto R. Cordova
Address: 14 Previous Street
Atown
City, State, Zip: DE19803
Office Telephone:
Home Phone:

First Choice: 2 BR
Second Choice: 1 BR
Third Choice:
Household Size: 4
Annual Income: 0.00
Comment:

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

Property Waiting Lists For This Prospect
[kn504dt](#)

Position tab

Contact Log | **50059** | **Tax Credit** | **Demographics** | **Preferences** | **Position**

Contact Date:
Contact Time:
Type of Contact:

Comment:

[Add to Contact Log](#)

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
<input type="checkbox"/>	01/30/2020	11:15 AM	New Application	Applied as Huberto R. Cordova. 1st Choice-2 BR, 2nd Choice-1 BR	On List	kay.nolan@yardi.com	kay.nolan@yardi.com

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.

Waiting List

Name

Huberto R. Cordova

Address

14 Previous Street

City, State, Zip

Atown

City, State, Zip

DE19803

Office Telephone

Home Phone

Save

Help

First Choice

2 BR

Second Choice

1 BR

Third Choice

Household Size

4

Annual Income

0.00

Comment

Property Waiting Lists For This Prospect

kn504dt

Contact Log

50059

Tax Credit

Demographics

Preferences

Position

First Choice

Bedroom Size

2

HUD Rank

2

HUD ELI Rank

2

TC Rank

2

Second Choice

Bedroom Size

1

HUD Rank

1

HUD ELI Rank

1

TC Rank

1

- 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.

Resident

Functions

Data

Reports

First Name

Anthony

Resident ID

t0010728

Middle Name

Michael

Property

[kn504dt](#)

Last Name

Anderson

Unit

[3](#)

Address

42 59th Street 3

Prospect

[p0003110](#)

City State

49400 SC

Status

Current

Zip

Legal

Edit

Close

Help

Affordable

Lease Info

Deposit Info

Lease Charges

Late Fees & Accounts

Other Info

Personal Info

50059 Data

Cert Type	Effective Date	Contract Rent	TTP	Util Allow.	Tenant Rent	HAP	Edit
AR Print	04/01/2019	1,000	605	100	505	495	View
AR Print	04/01/2018	1,000	750	100	650	350	View
MI Print	04/16/2017	1,000	560	100	460	540	View

Tax Credit Data

Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
AR Print	04/01/2019	703	605	100	505	495	Edit
AR Print	04/01/2018	703	750	100	650	350	View
MI Print	04/16/2017	701	560	100	460	540	View

50059

☒

Subsidy Provider

Tax Credit

☒

Do not apply rent charges

☒

No Summary Receipts

☐

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

Affordable Waiting List

Resident Functions Data Reports

First Name: Anthony
Middle Name: Michael
Last Name: Anderson
Address: 42 59th Street 3
City State: 49400 SC
Zip:
Edit Close Help

Affordable Lease Info Deposit Info Lease Charges

50059 Data

Cert Type	Effective Date	Contract Rent	TTP	Util Allow.	Tenant Rent	HAP	Edit
AR	04/01/2019	1,000	605	100	505	495	View
AR	04/01/2018	1,000	750	100	650	350	View
MI	04/16/2017	1,000	560	100	460	540	View

Tax Credit Data

Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
AR	04/01/2019	703	605	100	505	495	Edit
AR	04/01/2018	703	750	100	650	350	View
MI	04/16/2017	701	560	100	460	540	View

50059 ☒ Subsidy Provider:
Tax Credit ☒ Do not apply rent charges ☒
No Summary Receipts ☐



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.

Waiting List

Name

Anthony M. Anderson

Address

4252 Previous Street

City, State, Zip

Atown, DE 19809

Office Telephone

(302) 557-6789 x13024

Home Phone

First Choice

2 BR

Second Choice

Third Choice

Household Size

4

Annual Income

12,200.00

Comment

Save

Help

Property Waiting Lists For This Prospect

kn504dt

Contact Log

50059

Tax Credit

Demographics

Preferences

Position

Contact Date

02/03/2020

Calendar

Contact Time

9:00 AM

Clock

Type of Contact

New Application

Comment

Add to Contact Log

Edit

Date

Time

Type of Contact

Comment


Status

Added By

	04/16/2017	1:15 PM	Moved In	Moved in	Moved In	kay.nolan@yardi.com
	04/10/2017	2:15 PM	Unit Accepted		On List	kay.nolan@yardi.com
	04/02/2017	10:15 AM	Application Approved		On List	kay.nolan@yardi.com
	02/01/2017	10:00 PM	Update	Applicant's info mailed to Applicant	On List	kay.nolan@yardi.com
	01/30/2017	9:45 AM	New Application	Applied as Anthony M. Anderson. 1st Choice-2 BR	On List	kay.nolan@yardi.com


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

Waiting List			
Name	Anthony M. Anderson	First Choice	2 BR
Address	4252 Previous Street	Second Choice	
		Third Choice	
City, State, Zip	Atown, DE 19809	Household Size	4
Office Telephone	(302) 557-6789 x13024	Annual Income	12,200.00
Home Phone		Comment	
<input type="button" value="Save"/> <input type="button" value="Help"/>			
<div> <div>Contact Log</div> <div>50059</div> <div>Tax Credit</div> <div>Demographics</div> <div>Preferences</div> <div>Position</div> </div>			
<div> <input checked="" type="checkbox"/> Requires Mobility Accessible Unit Income Limit: <div>Extremely Low</div> <input type="checkbox"/> Requires Visually Accessible Unit 236/RAP Eligibility: <div></div> <input type="checkbox"/> Requires Hearing Accessible Unit <input type="checkbox"/> Displaced </div>			


Property Waiting Lists For This Prospect
[kn504dt](#)

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

Waiting List			
Name	Anthony M. Anderson	First Choice	2 BR
Address	4252 Previous Street	Second Choice	
		Third Choice	
City, State, Zip	Atown, DE 19809	Household Size	4
Office Telephone	(302) 557-6789 x13024	Annual Income	12,200.00
Home Phone		Comment	
<input type="button" value="Save"/> <input type="button" value="Help"/>			
<div> <div>Contact Log</div> <div>50059</div> <div>Tax Credit</div> <div>Demographics</div> <div>Preferences</div> <div>Position</div> </div>			
<div> Estimated Percent of AMGI: <div>30</div> % Special Needs: <div></div> </div>			



Property Waiting Lists For This Prospect
[kn504dt](#)

- 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.

Waiting List

NameAnthony M. Anderson
Address4252 Previous Street
City, State, ZipAtown, DE 19809
Office Telephone(302) 557-6789 x13024
Home Phone

First Choice2 BR
Second Choice
Third Choice
Household Size4
Annual Income12,200.00
Comment



Property Waiting Lists For This Prospect
kn504dt

SaveHelp

Contact Log50059Tax CreditDemographicsPreferencesPosition

GenderMale
Ethnicity2-Non-Hispanic
Race (Choose all that apply)
☒ White ☐ Black ☐ Native American ☐ Asian ☐ Pacific Islander ☐ Other ☐ Declined to Report


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

- 10 Remove or select appropriate preferences.

Waiting List

NameAnthony M. Anderson
Address4252 Previous Street
City, State, ZipAtown, DE 19809
Office Telephone(302) 557-6789 x13024
Home Phone


First Choice2 BR
Second Choice
Third Choice
Household Size4
Annual Income12,200.00
Comment



Property Waiting Lists For This Prospect
kn504dt

SaveHelp

Contact Log50059Tax CreditDemographicsPreferencesPosition



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

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

Waiting List

Name

Anthony M. Anderson

Address

4252 Previous Street

City, State, Zip

Atown, DE 19809

Office Telephone

(302) 557-6789 x13024

Home Phone

First Choice

2 BR

Second Choice

Third Choice

Household Size

4

Annual Income

12,200.00

Comment

Save

Help

Property Waiting Lists For This Prospect

kn504dt

Contact Log

50059

Tax Credit

Demographics

Preferences

Position

Contact Date

Contact Time

Type of Contact

Comment

Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited
	02/03/2020	9:00 AM	New Application	1st Choice-2 BR	On List	kay.nolan@yardi.com	kay.nolan@yardi.com
	04/16/2017	1:15 PM	Moved In	Moved in	Moved In	kay.nolan@yardi.com	kay.nolan@yardi.com
	04/10/2017	2:15 PM	Unit Accepted		On List	kay.nolan@yardi.com	kay.nolan@yardi.com
	04/02/2017	10:15 AM	Application Approved		On List	kay.nolan@yardi.com	kay.nolan@yardi.com
	02/01/2017	10:00 PM	Update	Applicant's info mailed to Applicant	On List	kay.nolan@yardi.com	kay.nolan@yardi.com
	01/30/2017	9:45 AM	New Application	Applied as Anthony M. Anderson. 1st Choice-2 BR	On List	kay.nolan@yardi.com	kay.nolan@yardi.com

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.

Waiting List

Name

Huberto R. Cordova

Address

14 Previous Street

City, State, Zip

Atown DE19803

Office Telephone

Home Phone

Save

Help

First Choice

2 BR

Second Choice

1 BR

Third Choice

Household Size

4

Annual Income

0.00

Comment

Property Waiting Lists For This Prospect

kn504dt

Contact Log

50059

Tax Credit

Demographics

Preferences

Position

Contact Date

Contact Time

Type of Contact

Comment

Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status	Added By
<input type="checkbox"/>	01/30/2020	11:15 AM	New Application	Applied as Huberto R. Cordova. 1st Choice-2 BR, 2nd Choice-1 BR	On List	kay.nolan@yardi.com

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

Waiting List

Name

Huberto R. Cordova

Address

14 Previous Street

City, State, Zip

Atown DE19803

Office Telephone

Home Phone

Save

Help

First Choice

2 BR

Second Choice

1 BR

Third Choice

Household Size

4

Annual Income

0.00

Comment

Property Waiting Lists For This Prospect

kn504dt

Contact Log

50059

Tax Credit

Demographics

Preferences

Position

Contact Date

02/03/2020

Contact Time

9:15 AM

Type of Contact

Update

Comment

phone call to confirm Feb 5 showing appt at 1

Add to Contact Log

Edit

Date

Time

Type of Contact

Comment

Status

Added By

01/30/2020

11:15 AM

New Application

Applied as Huberto R. Cordova. 1st Choice-2 BR, 2nd Choice-1 BR

On List

kay.nolan@yardi.com

Type of contact

Comment

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

Waiting List

Name

Huberto R. Cordova

Address

14 Previous Street

City, State, Zip

Atown

City, State, Zip

DE19803

Office Telephone

Home Phone

First Choice

2 BR

Second Choice

1 BR

Third Choice

Household Size

4

Annual Income

0.00

Comment

Save

Help

Property Waiting Lists For This Prospect

kn504dt

Contact Log

50059

Tax Credit

Demographics

Preferences

Position

Contact Date

Contact Time

Type of Contact

Comment

Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status	Added By
	02/03/2020	9:15 AM	Update	phone call to confirm Feb 5 showing appt at 10AM	On List	kay.nolan@yardi.com
	01/30/2020	11:15 AM	New Application	Applied as Huberto R. Cordova. 1st Choice-2 BR, 2nd Choice-1 BR	On List	kay.nolan@yardi.com

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**.

Affordable Waiting List

Resident Functions Data Reports

First Name: Anthony
 Middle Name: Michael
 Last Name: Anderson
 Address: 42 59th Street 3
 City State: 49400 SC
 Zip:
 Edit Close Help

Affordable Lease Info Deposit Info Lease Charges

50059 Data

Cert Type	Effective Date	Contract Rent	TTP	Util Allow.	Tenant Rent	HAP	Edit
AR Print	04/01/2019	1,000	605	100	505	495	View
AR Print	04/01/2018	1,000	750	100	650	350	View
MI Print	04/16/2017	1,000	560	100	460	540	View

Tax Credit Data

Cert Type	Effective Date	Max Rent	Rent	Util Allow.	Tenant Rent	Subsidy	Edit
AR Print	04/01/2019	703	605	100	505	495	Edit
AR Print	04/01/2018	703	750	100	650	350	View
MI Print	04/16/2017	701	560	100	460	540	View

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

Attachment
 Credit Card Setup
 EFT Setup
 Email
 Inspection
 Memo
 New WO
 Recurring Payment Setup
 Lease Charges
 Roommates
 Manage Rentable Items
 Resident History
 Workflow
 CRRM Lease Renewal(Ontario/British Columbia)
 Leak Tracking
 Utility Billing Preferences
 Former Tenant/Collections Data
 Notice of Termination History
 Worksheet - Other Ontario Forms
 Affordable Waiting List
 50059 Certification Stack
 50059 History
 TIC History
 Compliance

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

Waiting List

Name: Anthony M. Anderson
 Address: 4252 Previous Street
 City, State, Zip: Atown, DE 19809
 Office Telephone: (302) 557-6789 x13024
 Home Phone:
 Save Help

First Choice:
 Second Choice:
 Third Choice:
 Household Size: 4
 Annual Income: 12,200.00
 Comment:
 Property Waiting Lists For This Prospect
 kn504dt

Contact Log 50059 Tax Credit Demographics Preferences Position

Contact Date: 02/03/2020
 Contact Time: 9:40 AM
 Type of Contact: Update
 Comment: Made appointment for Feb 4 showing: #5
 Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status	Added By	E
<input type="checkbox"/>	02/03/2020	9:00 AM	New Application	1st Choice-2 BR	On List	kay.nolan@yardi.com	kay.nola
<input type="checkbox"/>	04/16/2017	1:15 PM	Moved In	Moved in	Moved In	kay.nolan@yardi.com	kay.nola
<input type="checkbox"/>	04/10/2017	2:15 PM	Unit Accepted		On List	kay.nolan@yardi.com	kay.nola
<input type="checkbox"/>	04/02/2017	10:15 AM	Application Approved		On List	kay.nolan@yardi.com	kay.nola
<input type="checkbox"/>	02/01/2017	10:00 PM	Update	Applicant's info mailed to Applicant	On List	kay.nolan@yardi.com	kay.nola
<input type="checkbox"/>	01/30/2017	9:45 AM	New Application	Applied as Anthony M. Anderson. 1st Choice-2 BR	On List	kay.nolan@yardi.com	kay.nola

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.

Waiting List

Name

Anthony M. Anderson

Address

4252 Previous Street

City, State, Zip

Atown, DE 19809

Office Telephone

(302) 557-6789 x13024

Home Phone

Save

Help

First Choice

2 BR

Second Choice

Third Choice

Household Size

4

Annual Income

12,200.00

Comment

Property Waiting Lists For This Prospect

kn504dt

Contact Log

50059

Tax Credit

Demographics

Preferences

Position

Contact Date

Contact Time

Type of Contact

Comment

Add to Contact Log

Edit

Date

02/03/2020

Time

9:40 AM

Type of Contact

Update

Comment

Made appointment for Feb 4 showing: #5, 11AM

Status

On List

Added By

kay.nolan@yardi.com

02/03/2020

9:00 AM

New Application

1st Choice-2 BR

On List

kay.nolan@yardi.com

04/16/2017

1:15 PM

Moved In

Moved in

Moved In

kay.nolan@yardi.com

04/10/2017

2:15 PM

Unit Accepted

On List

kay.nolan@yardi.com

04/02/2017

10:15 AM

Application Approved

On List

kay.nolan@yardi.com

02/01/2017

10:00 PM

Update

Applicant's info mailed to Applicant

On List

kay.nolan@yardi.com

01/30/2017

9:45 AM

New Application

Applied as Anthony M. Anderson. 1st Choice-2 BR

On List

kay.nolan@yardi.com

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:

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Moving Households to the Bottom of a Waiting List	23
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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 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.

Waiting List

Name: Frank K. Douglas
Address: 5 Previous Street
City, State, Zip: Atown, SC 49400
Office Telephone: (843) 547-7567
Home Phone:

First Choice: 2 BR
Second Choice: 1 BR
Third Choice:
Household Size: 4
Annual Income: 0.00
Comment:

Property Waiting Lists For This Prospect
knx1003

Save Help

Contact Log 50059 Tax Credit Demographics Preferences Position

Contact Date: 02/17/2020
Contact Time: 3:30 PM
Type of Contact: Move to Bottom of WL
Comment: Per selection plan: refused two units
Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	02/14/2020	11:00 AM	Unit Refused	Per Mr. Douglas; family wants a unit in a different location	On List	karinn	karinn
	02/13/2020	10:45 AM	Unit Offered	Offered unit 5	On List	karinn	karinn
	10/21/2019	9:15 AM	Unit Refused	Per Mr. Douglas, family not ready to move until later date	On List	karinn	karinn
	10/20/2019	10:15 AM	Unit Offered	Offered unit 2	On List	karinn	karinn
	10/02/2017	10:00 AM	New Application	Applied as Frank K. Douglas. 1st Choice-2 BR, 2nd Choice-1 BR	On List	karinn	karinn

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

Name

Frank K. Douglas

Address

5 Previous Street

City, State, Zip

Atown, SC 49400

Office Telephone

(843) 547-7567

Home Phone

Save

Help

First Choice

2 BR

Second Choice

1 BR

Third Choice

Household Size

4

Annual Income

0.00

Comment

Property Waiting Lists For This Prospect

knx1003

Contact Log

50059

Tax Credit

Demographics

Preferences

Position

Contact Date

Contact Time

Type of Contact

Comment

Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	02/17/2020	3:30 PM	Move to Bottom of WL	Per selection plan: refused two units	On List	karinn	karinn
	02/14/2020	11:00 AM	Unit Refused	Per Mr. Douglas; family wants a unit in a different location	On List	karinn	karinn
	02/13/2020	10:45 AM	Unit Offered	Offered unit 5	On List	karinn	karinn
	10/21/2019	9:15 AM	Unit Refused	Per Mr. Douglas, family not ready to move until later date	On List	karinn	karinn
	10/20/2019	10:15 AM	Unit Offered	Offered unit 2	On List	karinn	karinn
	10/02/2017	10:00 AM	New Application	Applied as Frank K. Douglas. 1st Choice-2 BR, 2nd Choice-1 BR	On List	karinn	karinn

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.

Waiting List

Name: Alice D. Moore
Address: 4 Previous Street
City, State, Zip: Atown, SC 49400
Office Telephone:
Home Phone:

First Choice: 2 BR
Second Choice:
Third Choice:
Household Size: 3
Annual Income: 0.00
Comment:

Property Waiting Lists For This Prospect
[kn504dt](#)

Save Help

Contact Log 50059 Tax Credit Demographics Preferences Position

Contact Date: 01/30/2020
Contact Time: 4:30 PM
Type of Contact: Application Rejected

Comment: Background check - see copy in file
Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	12/28/2019	9:30 AM	New Application	Applied as Alice D. Moore. 1st Choice-2 BR	On List	karn	karin

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.

Waiting List

Name

Alice D. Moore

Address

4 Previous Street

City, State, Zip

Atown, SC 49400

Office Telephone

Home Phone

First Choice

2 BR

Second Choice

Third Choice

Household Size

3

Annual Income

0.00

Comment

Save

Help

Property Waiting Lists For This Prospect

kn504dt

Contact Log

50059

Tax Credit

Demographics

Preferences

Position

Contact Date

Contact Time

Type of Contact

Comment

Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	01/30/2020	4:30 PM	Application Rejected	Background check - see copy in file	Removed	karin	karin
	12/28/2019	9:30 AM	New Application	Applied as Alice D. Moore. 1st Choice-2 BR	On List	karin	karin

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		Disablc
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		Disablc
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		Disablc
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**

Prospect Guest Card Other Data ▾

First Name: Harold MI S
 Last Name: Brown
 Address: 42 Previous Street
 City State Zip: Atown DE 19809
 Tel# Office-Home: (302) 558-7687 (302) 435-4123
 Cell# - Fax#: (302) 547-7678
 DOB - DL#/State:
 Email:
 Notes:

Status: Applied
 Code: p0003113
 Property: kn504dt
 Unit: 8
 Unit Type: kn_af11
 First Contact: Call
 Agent: Fred Flanders
 Source: Website
 Result:
 Date: 03/16/2017

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

Contacts Waiting List Previous Quote

Application Status

Action	Date	Agent
Submit Application	01/23/2020	Fred Flanders

Ledger Assign Unit Approve Deny Cancel
 Edit 50059 Edit TIC Adjust Move-In Date

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.

Deny Application

Harold S. Brown, HUD Waiting List Rank: 1

Date: 01/23/2020
 Time: 11:45 AM
 Agent: Fred Flanders
 Reason: Criminal/Credit

Removal Comment for Waiting List Contact Log
 Background check. See applicant's file for information. X

Save

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

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

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

Calendar Waiting List Details - 01/31/2020 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	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 50 Oldtown Avenue						



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 keep a 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.

Waiting List

Name: Melissa C. Small
 Address: 24 Previous Street
 City, State, Zip: Atown, DE 19809
 Office Telephone: (302) 665-6787
 Home Phone: (302) 543-4546

First Choice: 2 BR
 Second Choice:
 Third Choice:
 Household Size: 2
 Annual Income: 15,000.00

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

Property Waiting Lists For This Prospect
[kn504dt](#)

Contact Log | 50059 | Tax Credit | Demographics | Preferences | Position

Contact Date: 01/31/2020
 Contact Time: 11:15 AM
 Type of Contact: Removed

Comment: Found a unit in another property
[Add to Contact Log](#)

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	11/21/2019	4:00 AM	New Application	Applied as Melissa C. Small. 1st Choice-2 BR	On List	karin	karin

Contact type

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

Name

Melissa C. Small

First Choice

2 BR

Address

24 Previous Street

Second Choice

City, State, Zip

Atown, DE 19809

Third Choice

Office Telephone

(302) 665-6787

Household Size

2

Home Phone

(302) 543-4546

Annual Income

15,000.00

Comment

Save

Help

Property Waiting Lists For This Prospect

kn504dt

Contact Log

50059

Tax Credit

Demographics

Preferences

Position

Contact Date

Comment

Contact Time

Add to Contact Log

Type of Contact

Edit	Date	Time	Type of Contact	Comment	Status	Added By	Edited By
	01/31/2020	11:15 AM	Removed	Found a unit in another property	Removed	karin	karin
	11/21/2019	4:00 AM	New Application	Applied as Melissa C. Small. 1st Choice-2 BR	On List	karin	karin

Waiting list contact type

Waiting list status

Conclusion and Exercises

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

Exercises

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

CHAPTER 3

Layered HUD 50059 and LIHTC Property Waiting List Management

In this lesson:

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Reviewing and Updating Waiting List Information for Residents	38
Generating HUD 50059 Property Waiting List Reports	39
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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 **Affordable Waiting Lists** heading represents the waiting list for the selected property. Although each property has only one waiting list, Voyager shows the waiting list subdivided by bedroom size, defined as the number of bedrooms in the 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.

Community Manager Dashboard - Hudcredit Apartments

Resident Activity	Unit Statistics	Traffic
Move In 0	Total Units 10	Prospect Pipeline 3
Move Out 0	Leased Units 6 60.0%	Today's Showings 0
Deposit Accounting 1	Occupied Units 6 60.0%	Affordable Waiting Lists 2
On Notice 0	Available Units 4 40.0%	Pending Applications 1
Incomplete Certs 2	Model/Down/Admin 0 0%	
Annual Certs Due 6	On Hold Units 0 0%	
Unanswered Letters 0	Unit Transfers 0	
Expiring Leases (120 days) 0		
Scheduled Lease Renewals 0		
Alerts 1		
Scheduled Roommate Promotions 0		
Maintenance		
Pending Make Ready 1		
Pending Work Requests 0		
Completed WO Followup 0		

Tuesday, February 4, 2020

[Prop/List](#)

[Add Guest](#) [Quick Guest](#)

[Leasing Specials](#) [Daily Activity](#)

[Hot Sheet](#) [Monitor Reports](#)

[New PO](#) [New Svc. Req.](#)

[Print Letters](#) [Tax Credit Quick Check](#)

Open Batches

[Charges](#) [New Charge Batch](#)

[Receipts](#) [New Receipt Batch](#)

[Payables](#) [New Payable Batch](#)

Calendar Affordable Waiting Lists - 02/04/2020 Person Search

Property	BR Size	Number on List	Current Status
kn504dt	1 BR	6	Opened on 2/1/2016 at 10:45 AM
kn504dt	2 BR	2	Opened on 2/1/2016 at 10:45 AM

Number of people on each list

Waiting list sorted by bedroom size

List by number of bedrooms

- 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.

Community Manager Dashboard - Hudcredit Apartments

Resident Activity
Move In 0
Move Out 0
Deposit Accounting 1
On Notice 0
Incomplete Certs 2
Annual Certs Due 6
Unanswered Letters 0
Expiring Leases (120 days) 0
Scheduled Lease Renewals 0
Alerts 1
Scheduled Roommate Promotions 0
Maintenance
Pending Make Ready 1
Pending Work Requests 0
Completed WO Followup 0

Unit Statistics
Total Units 10
Leased Units 6 60.0%
Occupied Units 6 60.0%
Available Units 4 40.0%
Model/Down/Admin 0 0%
On Hold Units 0 0%
Unit Transfers 0
Traffic
Prospect Pipeline 3
Today's Showings 0
Affordable Waiting Lists 2
Pending Applications 1

Tuesday, February 4, 2020
Prop/List kn504dt
Add Guest Quick Guest
Leasing Specials Daily Activity
Hot Sheet Monitor Reports
New PO New Svc. Req.
Print Letters Tax Credit Quick Check
Open Batches
Charges New Charge Batch
Receipts New Receipt Batch
Payables New Payable Batch

Calendar | Waiting List Details - 02/04/2020 | Person Search

HUD Rank	HUD ELI Rank	TC Rank	Prospect Property	Name and Address	BR Size Pref	Effective Date	Effective Time	Household Size	Comment	Preference
1	1	1	kn504dt	Huberto R. Cordova 14 Previous Street, Atown DE19803 Cell: (302) 556-7679	1BR-Second Choice	01/30/2020	11:15 AM	4		Disabled, USA Vete
2	2	2	kn504dt	Erika R. Trent 5 Previous Street, Unit 2A Atown, DE 19809 Home: (302) 554-5676 Office: (302) 223-4345	1BR-First Choice	03/16/2016	9:30 AM	2		Homeless family
3	3	3	kn504dt	Lorena R. Gerome 1 Previous Street Atown, DE 19809 Office: (302) 443-1564 Cell: (302) 446-5678	1BR-Second Choice	07/02/2016	9:00 AM	2		
4	4	4	kn504dt	Susan N. Williams 543, Oldtown Avenue Atown, DE 19890 Office: (302) 554-5676 Cell: (186) 556-7678	1BR-First Choice	09/03/2016	10:15 AM	1		Homeless family, T
5	5	5	kn504dt	Renee W. Wiles 50 Oldtown Avenue Atown, DE 19809	1BR-First Choice	09/28/2016	1:15 PM	1		

HUD sort order

LIHTC 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.

- 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.

The screenshot shows the 'Compliance Reports' filter section. It includes various input fields and dropdown menus for filtering the report data. The 'Property' field is set to 'kn504dt'. The 'Tenant Status' dropdown is set to 'Current'. The 'Effective Date' is set to '02/01/2020'. The 'Report Type' is set to 'Waiting List'. The 'Summarize By' dropdown is set to 'Property'. The 'Bedroom Size' dropdown is set to 'ALL BR Sizes'. The 'Show 'On List'', 'Show 'Moved In'', 'Show 'Removed'', and 'Claim Denied' checkboxes are all checked. The 'Display', 'PDF', 'Excel', and 'Clear' buttons are visible on the right side of the form.

Compliance Reports	
Property	kn504dt
Contract	
Building	
Unit Type	
Unit	
Tenant	
Tenant Status	Current
Effective Date	02/01/2020
Month / Year	
Report Type	Waiting List
Summarize By	Property
Bedroom Size	ALL BR Sizes
Show 'On List'	Yes
Show 'Moved In'	Yes
Show 'Removed'	Yes
Claim Denied	Yes
<input type="checkbox"/> Show Grid	
Display	
PDF	
Excel	
Clear	

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'	<ul style="list-style-type: none"> • 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'	<ul style="list-style-type: none"> • 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'	<ul style="list-style-type: none"> • 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.

Compliance Reports

Property: x Tenant Status: Bedroom Size: ☐ Show

Contract: Effective Date: to Show 'On List': Show 'Moved To':

Building: Month / Year: Report Type: Summarize By:

Unit Type: Display PDF Excel Clear

Tenant:

Waiting List
Property: Hudcredit Apartments (kn504dt)
Effective Date: 02/01/2020

HUD Rank	HUD ELI Rank	TC Rank	Prospect Property	Name and Address	BR Size Preference	Effective Date	Special Unit Requirements	HUD Income Limit	TC Special Needs	TC Percent of AMGI	Current Status	Contact
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	03/16/2016						
2	2	2	kn504dt	Frank K. Douglas 5 Previous Street Atown, SC 49400 Home: (843) 545-6788 Office: (843) 445-4567	2BR-First Choice 1BR-Second Choice	05/12/2016	an Mobility Accessible	Extremely Low		20.00	Removed	01/31/20 03/16/20
3	3	3	kn504dt	Robert J. Jaffe 34 Oldtown Avenue Atown, DE 19890 Home: (302) 443-4565 Office: (302) 445-6588 Cell: (302) 667-7867	2BR-First Choice 1BR-Second Choice	06/27/2016	an Mobility Accessible	Extremely Low		35.00	Removed	05/12/20 05/12/20 05/12/20 05/12/20 01/27/20 01/26/20 12/20/20
4	4	4	kn504dt	Raymond L. Johnson 345 Previous Street Atown, DE 19809 Office: (302) 334-5456 Cell: (306) 654-5674	2BR-First Choice	08/31/2016		Extremely Low		30.00	Moved In	03/20/20 03/20/20 03/10/20 02/01/20 06/27/20
5	5	5	kn504dt	John D. Lin 44 Previous Street Atown, DE 19809 Office: (302) 445-6567 Cell: (664) 447-6789	2BR-First Choice	01/30/2017		Extremely Low		30.00	On List	02/01/20 08/31/20
6	6	6	kn504dt	Huberto R. Cordova 14 Previous Street, Atown DE19803 Cell: (302) 556-7679	2BR-First Choice 1BR-Second Choice	01/30/2020		Extremely Low		30.00	On List	02/10/20 02/01/20 01/30/20 11/07/20 11/07/20 11/07/20 11/07/20
7	7	7	kn504dt	Miller D. Wheaton 23 Previous Street, Unit 45 Atown, SC 49400 Office: (843) 445-4567 Suzanna O. Hobson A Previous Street, Unit 45	1BR-First Choice	01/04/2016	an Mobility Accessible	Extremely Low		30.00	On List	01/30/20 05/12/20 01/04/20 05/12/20

HUD ranks

LIHTC rank

Waiting list status

Conclusion and Exercises

You should now be able review waiting list information a prospect or resident, review the waiting list for 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.