CLASS LIST + DESCRIPTIONS

FORUM

AFFORDABLE HOUSING & PHA

APRIL 10 - 11 | NASHVILLE, TN

AFFORDABLE HOUSING

50059 Special Claims Functionality & Reports in Compliance Manager
Learn to use the features in Voyager 8 Compliance Manager designed to help ensure you are requesting all available HUD special claims for your properties. [50059]

50059: Voucher Reconciliation
Gain guidance for correcting 50059 vouchers in Voyager, avoiding common voucher errors and correcting voucher discrepancies. [50059]

Afforable GPR: Reporting, Journal Entry & Reconciliation
This session is for advanced Voyager Affordable Housing users whose goal is to measure affordable housing property performance by analyzing gross potential rent (GPR). We will examine GPR report specifications, the GPR Journal Entry process and review the month-end accounts receivable reconciliation process. [All Subsidy Types]

Affordable Housing Best Practices: Dashboard Tools in Voyager 8 Compliance Manager
Affordable housing presents many challenges that market rate properties do not encounter. It's important that site and compliance staff know and follow proper procedures to assure compliance and efficiency in property operations.

This session provides information to help your staff efficiently and fairly maintain affordable housing program compliance. [All Subsidy Types]

Affordable Housing Voyager 8 Compliance Manager: Introduction
Compliance Manager integrates tasks from Voyager, RentCafe and RightSource to simplify your onsite operations. Join us to see how Compliance Manager can help your team members streamline their daily activities. [All Subsidy Types]

Best Practices for Leveraging Yardi Verification Services
Yardi Verification Services enables clients to obtain upfront income, asset and other verifications. This method of verification is preferred by HUD and Housing Finance Agencies and is a significant change in procedure for site staff, applicants and residents. In this course, we will discuss best practices for using Verification Services to streamline the certification process. Learn how clients are incorporating Verification Services during the qualification process including how to support applicants/residents, overcome objections and confirm verifications are received with applicants/residents. [All Subsidy Types]

Change Management: Strategies for Adapting to Evolving Property Operations
Adaptability is the key to success in today's dynamic property management landscape. In this interactive roundtable, a team of industry experts will discuss approaches for implementing new processes and software products while addressing team concerns and fostering collaboration.

This session is designed to encourage sharing of ideas and practical problem solving, providing property managers and compliance professionals with tools to lead successful transitions. Join the conversation to gain insights, build resilience and empower your team to thrive in time of change. [All Subsidy Types]

Data-Driven Decisions with RightSource Reporting
Discover how to efficiently review and analyze RightSource reports to better understand your property's operations and activity trends.

HOTMA & Yardi Voyager
HOTMA final rule changes went into effect January 1, 2024. However, HUD has delayed implementation for 50059 properties pending TRACS 203A specifications and the availability of site software. Voyager plug-in updates provide the flexibility to support LIHTC & HOME HOTMA implementations on a property-by-property basis. This class will discuss changes to Voyager in support of updated HOTMA requirements. [All Subsidy Types]

HOTMA in Action: Top 10 Time-Saving Benefits & Best Practices for Income Calculation
Learn to leverage the Housing Opportunity Through Modernization Act (HOTMA) to boost efficiency and streamline your compliance operations. This course explores the top 10 time-saving benefits of HOTMA, and provides actionable best practices tailored for affordable housing professionals.

Led by Lisa Furbush, Manager of Affordable Housing Compliance Policy, this session will combine expert insights with practical strategies to help you streamline workflows and stay confidently compliant. Whether you're a property manager, compliance specialist or part of a centralized auditing team, you'll gain the tools and knowledge to make HOTMA work for you. [All Subsidy Types]

HUD 50059 Monthly Processing: Voyager 8 Compliance Manager
This session provides an overview of the monthly process for completing a 50059 HAP voucher in Voyager 8 Compliance Manager. Join us to see how the process has been streamlined with Compliance Manager. [50059]

Introduction to Local Program Administration
Managing multiple compliance programs on a property can be challenging, especially when state, city and local programs are added to the mix. We will explore how to manage an unlimited number of compliance programs with various rules as well as differing income and rent limits. Learn how to set up and administer local programs including establishing income and rent limits on a program-by-program or unit-by-unit basis. [Local Programs]

Leveraging Yardi Affordable Compliance Experts: Trends, Insights & Industry Updates
Join us for an engaging and interactive rountable discussion of compliance featuring insights from our industry experts. This dynamic session will explore the latest trends, regulatory updates and emerging hot topics in affordable housing.

Gain insider perspectives, actionable strategies and expert guidance to tackle pressing compliance challenges and stay ahead in this ever-evolving industry. Bring your questions and engage in meaningful discussions that will empower you to navigate today's complexities with confidence. [All Subsidy Types]

Class descriptions are subject to change at any time.

LIHTC: Average Income Test

To strengthen and increase availability of the LIHTC (Low-Income Housing Tax Credit) program, the updated Average Income Test (AIT) changes will allow tax credit qualified units to serve households earning as much as 80% of area median income (AMI) in a 60% restricted property. Recent changes in AIT will permit greater flexibility while keeping the property in compliance and dealing with the loss of one or more LIHTC units.

This change will also facilitate rents from higher income units. These changes will allow the LIHTC program to have a positive impact on more households and help improve property performance while a broader housing market. [Tax Credit]

LIHTC: Top Agency Audit Findings, Common Mistakes & How to Avoid Them

Navigating the complexities of the Low-Income Housing Tax Credit (LIHTC) program requires precision, but even the most diligent teams can encounter challenges during an agency audit. In this insightful session, we'll delve into the most common audit findings reported by monitoring agencies and provide actionable strategies to avoid them. [Tax Credit]

RentCafe Affordable Housing: Applicant Waiting List

Want to automate your waiting list applications or allow prospects to complete applications 24 hours a day, 7 days a week from anywhere? This session provides an overview of the RentCafe Affordable Housing online waiting list experience from the applicant's point of view. [All Subsidy Types]

RentCafe Affordable Housing: Processing Applicant Move-Ins

Do you want to improve the move-in experience for your prospects by allowing them to complete applications from anywhere? This session provides an overview of the RentCafe Affordable Housing online move-in experience from the applicant's point of view and demonstrates features designed to streamline and manage online applications. Learn how the RentCafe Affordable Housing move-in workflow can incorporate Yardi Verification Services and seamlessly tie into your Voyager software. [All Subsidy Types]

RentCafe Affordable Housing: Roundtable Discussion

RentCafe Affordable Housing provides extensive online portal features for affordable housing providers, residents and applicants. Join a discussion with your peers to learn how this product helps improve the prospect and resident experience while reducing the cost of compliance. [50059, Tax Credit, HOME, Rural Development]

RentCafe Affordable Housing: Site Administration Tools

Learn about best practices and tools your administration team can use to configure RentCafe for an improved applicant, resident and site manager experience. [All Subsidy Types]

RentCafe Affordable Housing: Site Manager & RightSource

Join this session to gain a clearer understanding of how workflows in RentCafe Affordable Housing Site Manager integrate with RightSource. We will focus on key data points within Site Manager to ensure that files are ready to be sent to your RightSource auditor. [All Subsidy Types]

Repayment Agreements, Part 1

Review the steps required to begin using Voyager Repayment Agreements. TRACS 203A requires significant changes to repayment agreement reporting. We will cover global setup steps, adding in-progress agreements and setting up owner/agent agreements. (Part 1 of 2) [50059]

Repayment Agreements, Part 2

This session reviews repayment agreement procedures in Voyager for current residents. TRACS 203A requires significant changes to repayment agreement reporting. We will show how to calculate the repayment agreement amount, add a new repayment agreement, review the ledger adjustments created by the repayment agreement, post repayment agreement charges and update repayment agreements. (Part 2 of 2) [50059]

Rural Development: Recommended Process in Voyager 8 Compliance Manager

Get a first-hand look at reporting and reviewing the MINC Project worksheet, MINC reporting and management fees. Watch as we demonstrate new features in Voyager for Rural Development Management Fee calculation and posting. This workflow is designed to help you increase accuracy and efficiency in the calculations of monthly per-occupied door management fees. [Rural Development]

Yardi Verification Services for Affordable Housing and PHA

HUD and Housing Finance Agencies are adopting a new income verification hierarchy that prefers upfront income verification over tenant provided documentation or time consuming written verification. Yardi Verification Services is one of the newest additions to the Yardi Affordable/PHA Housing Suite. Yardi Verification Services enables site staff to quickly request and receive critical income and asset verifications directly into RentCafe or Voyager. [All Subsidy Types]

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PHA

Best Practices for Leveraging Yardi Verification Services
Yardi Verification Services enables clients to obtain upfront income, asset and other verifications. This method of verification is preferred by HUD and Housing Finance Agencies and is a significant change in procedure for site staff, applicants and residents. In this course, we will discuss best practices for using Verification Services to streamline the certification process. Learn how clients are incorporating Verification Services during the qualification process including how to support applicants/residents, overcome objections and confirm verifications are received with applicants/residents.
[All Subsidy Types]

HOTMA: All About Interims
This course will review Yardi's best practices for managing interim changes. We'll cover online reporting, messaging to families, and when to use interims vs. other change, non-income 50058s.

HOTMA: PHA Highlights
Housing Opportunities Through Modernization Act (HOTMA) regulations are impacting all PHAs in the U.S. This class will describe how these new requirements will be implemented in Yardi with an emphasis on new screens, functions, reporting and the future.

HOTMA: Unpacking & Preparing for Rule Changes
Join us for a panel of hand-selected industry leaders discussing ongoing HUD initiatives, such as HOTMA. We'll unpack upcoming policy changes and discuss how agencies can prepare for them. We'll also acknowledge the united front required from PHA industry associations to effect these changes with collective advocacy. You won't want to miss it!

Housing Information Portal (HIP): The Future of REAC
Housing Information Portal (HIP) will dramatically change the way PHAs communicate with HUD. Get an update on the progress of this important initiative.

Maintenance & Inspection IQ: An Overview
Maintenance IQ and Inspection IQ provide dashboard-driven insights into critical PHA features. This class will include an overview of Housing Choice Voucher routing tools and a review of Vacant Turn dashboards that will help identify opportunities to make the most efficient use of your maintenance and inspection resources.

NSPIRE for HCV: An Overview
National Standards for the Physical Inspection of Real Estate (NSPIRE) is the HUD inspection protocol that will replace Housing Quality Standard (HQS). Topics in this class include integration of the NSPIRE protocol, RentCafe updates for landlords and helpful reporting tips.

NSPIRE for Multifamily & Public Housing: An Overview
National Standards for the Physical Inspection of Real Estate (NSPIRE) is HUD's inspection protocol for Multifamily and Public Housing. Topics in this class include integration of the NSPIRE protocol, self-inspections, automated work orders, suggested scoring and insight into Yardi's future plans.

Online Briefing, RFTA & HAP Contracts
This class will focus on Yardi's latest RentCafe features for online briefings and requests for tenancy approval. Leveraging the power of RentCafe, PHAs can brief applicants, issue vouchers, onboard new landlords, process RFTA documentation and sign HAP contracts online to help increase landlord retention.

PHA Ad-Hoc: Reports & Letters
This course will cover basic ad-hoc reporting tool features, including letter creation, designed to help public housing agencies quickly access critical data.

PHA Simplified Unit Transfers
Learn about Yardi's new unit transfer features for Voyager 8 Compliance Manager. This session will discuss both inter-and intra-property transfers for all program types.

Preparing for eVMS
Voucher Management System (VMS) is a cornerstone of HUD reporting for the Housing Choice Voucher program. This course will help prepare you for upcoming changes to this critical HUD reporting.

Voyager 8 Compliance Manager for HCV
Learn about the future of Voyager PHA. We will demonstrate the next generation of Voyager for housing specialists with an emphasis on eligibility, new admissions, and the integration of RentCafe.

Voyager 8 Compliance Manager for Project Based Vouchers
Learn about the future of Voyager PHA. We will demonstrate the next generation of Voyager for property managers with combination properties and the integration of RentCafe.

Voyager 8 Compliance Manager for Public Housing
Learn about the future of Voyager PHA. We will demonstrate the next generation of Voyager for property managers with an emphasis on eligibility, new admissions and the integration of RentCafe.

Waiting List Management: Best Practices
This class will explain how to leverage lottery features in RentCafe PHA and Voyager to optimize how your team manages the opening of a large Housing Choice Voucher waiting list. Industry best practices will also be reviewed.

Yardi Case Manager: Tracking Requests & Services
Case Manager is an exciting new ticketing system designed for PHAs and affordable housing providers. Dashboards and task-driven cases provide insight into internal and external communications to track reasonable accommodations, requests for information, resident services and other activities. Integration with Voyager provides seamless access to features that can improve relationships with clients and partners in the community.

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CORE PHA WORKFLOWS

Bank Reconciliation
Ensuring your software is properly aligned with your banking institution is critical for operating a successful business. This course will cover best practices for handling a monthly reconciliation and what to do when adjustments are needed.

Correcting Ledgers & Subledgers: Best Practices
Learn how to properly manage, adjust and correct ledgers and sub-ledgers using Yardi's best practices.

FSS Accounting: Best Practices
This class will show the financial management of FSS escrow accounts, distributing FSS interest and managing FSS disbursements for PHAs administering Family Self-Sufficiency programs.

Intercompany Accounting
As our businesses evolve, automation of complex banking relationships becomes increasingly important. Voyager's intercompany accounting features can save you time and reduce manual journal entries with several options to automate the due to and due from relationships.

Management Fees: Best Practices
This course will focus on our best practices for configuring, managing and reconciling management fees. Learn best practices for calculation, payment and receipt of fees for managing your properties and for those you are managing on behalf of other agencies.

Monthly Closing Processes: Best Practices
Join the team for a review of Yardi's best practices for closing monthly activities in Voyager. This course will focus on the implications of the closing procedures for financial reporting.

PHA Financial Features
This session covers key financial features of Voyager PHA. Topics include tenant repayment agreements, landlord and tenant overpayments, and garnishments.

PHA Rent & HAP Posting: Best Practices
This session will detail the best practices for PHA Post Rent & HAP. Learn all the available features and functions within this powerful tool.

SOLUTION DISCOVERY

Aspire: Overview of Yardi's Learning Management Solution
Find out how Aspire can improve your training program by bringing together fully customizable Yardi software training with critical industry-specific topics, from fair housing compliance and safety to sexual harassment and diversity. Yardi's 5-in-1 tool combines the accountability, reporting and efficiencies of a learning management system with a complete authoring tool set, graphics editor, file storage center and event and webinar management system. Learn how to connect your university with HR systems and additional programs to fully automate your training for all onboarding and continuing education. Deepen knowledge, save time, reduce errors and improve training efficiency with Aspire.

Construction Manager: Overview
Gain insight into managing construction projects efficiently while emphasizing the importance of staying on schedule and within budget. This class focuses on providing visibility and mitigating risks for many types of construction projects, including capital, ground up and rehabs. The course will cover contract management from RFP creation to vendor management, and will emphasize collaboration and optimized data management for better decision-making.

Data Connect: Overview
Yardi Data Connect is our next generation customized BI offering and is designed to leverage Microsoft Power BI technology. Learn about the product's secure API to stream data from one or more Voyager databases into your Azure environment. See how to combine it with other external data sources for comprehensive reporting. For clients using Power BI today or hoping to use it in the future, come join us to learn more.

Document Management for SharePoint: Overview
This class will demonstrate integration of data between your Yardi cloud and your Office 365 cloud. Learn how to redirect from Voyager and/or other Yardi Elevate solutions directly into Yardi dedicated SharePoint Online site collection(s). Users and administrators will benefit from organized structures, taxonomy, autonomous security management, easy to use navigation tools and seamless integrations into Outlook.

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Forecast IQ: An Overview
Learn how to streamline and improve your multifamily budgeting process with Forecast IQ. Leave your spreadsheets behind and make use of Forecast IQ's unit-level revenue and easily configurable expense forecasting, all with better process visibility and control.

ScreeningWorks Pro: Overview
Learn the basics and best practices of ScreeningWorks Pro. We will discuss the services Yardi offers from our rules-based scoring model to fraud prevention tools built into our screening approach. The class also provides an overview of the features, customizations and analytics that are available.

Yardi Procure to Pay: An Overview
This class provides an overview of Procure to Pay with emphasis on procurement, invoice processing, approvals and payments. Within this system, PayScan delivers consistent policies, eliminates paper invoices and facilitates electronic invoicing. Come see the full transaction lifecycle, from procurement to invoice to payment. If you're looking for ways to improve your AP process, this class is for you!

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PANEL DISCUSSIONS

AFFORDABLE HOUSING

Future-Proofing Property Management: Compliance Best Practices and Thriving in 2025
Hear from industry leaders who will provide crucial insights into the state of affordable housing compliance today, anticipated changes to federal housing regulations, HOTMA and TRACS 203A. This panel will also review NCSHA best practices for TIC and verification documents and the significance of compliance monitoring and audits.

PANELISTS:

Althea Arnold, Senior VP, Policy – SAHF (Stewards of Affordable Housing for the Future)

Lisa Furbush, Manager, Affordable Housing Compliance Policy - Yardi

Mary Ross, President & CEO - Ross Business Development

Stephanie Naquin, Director Property Management and Compliance - Novogradac & Company LLP

Mark Livanec, Industry Principal & Moderator - Yardi

PHA

HOTMA- Unpacking & Preparing for Rule Changes
Join us for a panel of hand-selected industry leaders discussing ongoing HUD initiatives, such as HOTMA. We'll unpack upcoming policy changes and discuss how agencies can prepare for them. We'll also acknowledge the united front required from PHA industry associations to affect these changes with collective advocacy. You won't want to miss it!

PANELISTS:

Eric Oberdorfer, Director of Policy and Legislative Affairs - NAHRO

Jeffrey Patterson, President - CLPHA and CEO of CMHA

Katie Goar, CEO - Quadel

Michael Webb, PHD Senior Policy Analyst - Public Housing Authorities Directors Association

Sheryl Putnam, Senior Director of Professional Services Nan McKay & Associates

Gabrielle Van Horn, Senior Director & Moderator - Yardi

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