

**CLASS LIST
DESCRIPTIONS**

F O R U M
AFFORDABLE HOUSING & PHA

**MAY 23-24
NATIONAL HARBOR, MD**

AFFORDABLE HOUSING

50059: Monthly Processing

This session provides monthly processing recommendations for completing a 50059 HAP voucher. We will also review the components affected when a HAP voucher is created and posted in Voyager, including resident certifications, resident ledgers and the general ledger.

50059: Special Claims Features & Reports

Learn how to use features available in Voyager that can 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.

Affordable GPR: Report and Journal Entry & Reconciliation

This session is for advanced Voyager Affordable Housing users who analyze gross potential rent (GPR) for affordable housing properties. We will examine GPR report specifications and review the month-end accounts receivable reconciliation process.

Affordable Housing Best Practices: Compliance Reporting

This session provides information for helping your staff efficiently review and maintain affordable housing program compliance. We will showcase compliance resources available from the Voyager dashboard. (Part 2 of 2) [All Subsidy Types]

Affordable Housing Best Practices: Dashboard Tools

This session provides information for helping your staff efficiently review and maintain affordable housing program compliance. We will showcase compliance resources available from the Voyager dashboard. (Part 1 of 2) [All Subsidy Types]

Affordable Housing 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.

Affordable Housing Roundtable Forum

Join us for an engaging and insightful Compliance Roundtable, where key experts and stakeholders converge to address hot topics in affordable housing.

The discussion is intended to foster a collaborative dialogue, exploring innovative and practical solutions to pressing concerns in today's affordable housing landscape. We will delve into a range of topics, including the latest trends in housing policy, questions on HOTMA implementation and information regarding TRACS 203A.

Hear from a panel of distinguished speakers who bring a wealth of experience and perspectives. [All Subsidy Types]

Converting from TRACS 202D to TRACS 203A

With the impending change from TRACS 202D to TRACS 203A, Voyager will provide special features and functions to assist in preparing properties for the transition. This class and documentation will help prepare your staff, properties and the Voyager database for the changes required to be successful with TRACS 203A. [50059]

Effectively Adapting to Change When Partnering with RightSource: Tips and Strategies

In this course, we will discuss the ways that the RightSource Client Services team supports clients and how to best leverage the resources available. Gain insights into how this team can help you overcome file challenges, minimize the number of submissions required to complete certifications and enhance overall compliance efficiency. This knowledge will be valuable in helping you streamline your own processes and achieve better compliance outcomes. [All Subsidy Types]

Family Self Sufficiency for 50059 Properties

In preparation for TRACS 203A, Yardi is working to add functionality to accommodate the HUD Family Self-Sufficiency (FSS) program. This session will introduce the required accounting setup and compliance functionality associated with the FSS program. [50059]

HOTMA & Yardi Voyager

HOTMA final rule changes went into effect January 1, 2024. HOTMA affects all federal low-income housing programs. This class will discuss changes to Voyager to accommodate updated HOTMA requirements. [All Subsidy Types]

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]

LIHTC: Average Income Test

Updates to the Average Income Test for the Low Income Housing Tax Credit program allow households earning as much as 80% of area median income within a 60% restricted property. Join this class to learn how these changes permit greater flexibility, keep the property in compliance while accommodating the loss of one or more LIHTC units and facilitating rents from higher income units. [Tax Credit]

RentCafe Affordable Housing: New Features Update

Join this session to learn about the newest RentCafe Affordable Housing features available to your property managers and compliance team. [All Subsidy Types]

RentCafe Affordable Housing: Processing Applicant Move-Ins

This session explores and demonstrates features and procedures designed to manage online applications. Learn how the RentCafe Affordable Housing move-in workflow seamlessly ties into your Voyager software.

RentCafe Affordable Housing: Processing Resident Recertifications

Learn how to review an annual recertification completed by a resident in Site Manager, compare it to previous certification information, send verification letters and verify the information to create the resident's annual recertification in Voyager.

RentCafe Affordable Housing: Roundtable

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]

RentCafe Affordable Housing: Waitlisting

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]

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]

RightSource Compliance Services: An Introduction

Join an introductory presentation of Yardi RightSource compliance services. Understand how Yardi can be your partner to help reduce the cost and complexity of compliance. Yardi RightSource can make it easier for your team to manage affordable housing properties with compliance consulting and integrated compliance processing. Learn about this unified solution that simplifies leasing, certifications and operations with RentCafe Affordable Housing, RightSource and Yardi Voyager. [All Subsidy Types]

RightSource Recommendations for HOTMA Policy Implementation

Gain a clear understanding of the provisions under the Housing Opportunity through Modernization Act of 2016 (HOTMA) and learn what owners and agents of HUD Multifamily Housing will be required to implement for all 01/01/2024 certifications. This session highlights major changes related to income, assets, mandatory deductions and interim reexaminations and best business practices. [All Subsidy Types]

Rural Development Best Practices

Take a look into reporting and reviewing the MINC Project worksheet, MINC reporting and Management Fees. Watch as we demonstrate the new Rural Development Management Fee calculation and posting functionality in Voyager. This workflow is intended to increase accuracy and efficiency in the calculations of monthly per-occupied door management fees. [Rural Development]

TRACS 203A: Compliance Changes

This session will cover the major differences between TRACS 202D and the upcoming release of TRACS 203A, as well as how to comply with the new requirements. Participants will walk away from this session with the compliance knowledge needed to successfully submit vouchers. [50059]

Unit Transfers and Rent Changes

The new Affordable Rent Change function applies to all program types (50059, Rural Development, Tax Credit, HOME and Local Programs) while processing a rent change. The program type will determine what Voyager displays on the filter screen to help ensure the correct criteria are being populated. We will also cover the new affordable housing unit transfer procedure! Join this session to learn how to use this valuable tool. [All Subsidy Types]

Yardi Verification Services for Affordable Housing

Yardi Verification Services is the newest addition to the Yardi Affordable Housing Suite. Site staff can quickly request and receive critical income and asset verification directly into RentCafe Affordable Housing. [All Subsidy Types]

PHA

Asset IQ: Executive Dashboards

Asset IQ for PHA provides dashboards into key PHA activities. Designed to give executive staff an overview of PHA operations, productivity and actionable information, this product gives leadership team members the information they need to make data-driven decisions.

HOTMA 103: Public Housing Over Income

HOTMA introduced new regulations for managing public housing over-income (PHOI) families. This class reviews record keeping and reporting for PHOI families, including new 50058 reporting.

HOTMA: All About Interims

This course will review Yardi's best practices for managing interim changes including online reporting changes, messaging to families and when to use interims vs. other change, non-income 50058s.

HOTMA: PHA Highlights

Housing Opportunities Through Modernization Act (HOTMA) regulations will impact all PHAs in the U.S. This class will describe how these new requirements will be implemented in Voyager with an emphasis on new screens, functions and reporting.

Housing Information Portal (HIP): The Future of REAC

Housing Information Portal (HIP) will dramatically change the way PHAs communicate with HUD. See a demonstration of the new Voyager HIP interface.

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.

Maximize Funding with VMS Reporting

Voucher Management System (VMS) is a cornerstone of HUD reporting for the Housing Choice Voucher program. This class will discuss the timeline for eVMS, explain the underlying logic that determines how the report is completed and provide best practices.

Navigating the New 50058

HUD is introducing three new 50058 forms with new fields, action types and rules. This class will review 50058 form changes that are part of HOTMA implementation. Learn what is changing and how your agency can best prepare for the changes.

NSPIRE: Understanding the New Inspection Protocols

National Standards for the Physical Inspection of Real Estate (NSPIRE) is HUD's inspection protocol that will replace REAC and Housing Quality Standard (HQS). Topics in this class include integration of the NSPIRE protocol, 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 Unit Transfers

Learn about the "ins and outs" of unit transfers in the PHA system. This session will discuss both inter- and intra-property transfers for all program types.

Recertifications: Best Practices

Recertifications are an integral part of an agency's daily activities. This class will teach you how to leverage Voyager and RentCafe PHA to effectively and efficiently recertify families. Topics will include best reporting practices, online recertifications, streamlining verifications and communications with participants.

RentCafe PHA: Roundtable Discussion

Join this interactive session with other PHAs and Yardi staff to discuss how using RentCafe can cut costs, improve productivity and provide families with enhanced flexibility. Topics include encouraging utilization, training families and learning from those who have successfully implemented this powerful tool.

Voyager 8: Compliance Manager

Learn about the future of Voyager PHA. We will demonstrate the next generation of Voyager for housing specialists and property managers, including new dashboards and workflows.

Waiting List Management: Best Practices

This class will explain how to leverage RentCafe PHA and Voyager lottery options to optimize the process of managing a large Housing Choice Voucher waiting list opening. Industry best practices will also be reviewed.

Yardi Case Manager: Tracking Requests & Services

Case Manager is an exciting new ticketing system designed for PHA and Affordable Housing. 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.

CORE PHA WORKFLOWS

Bank Reconciliation

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

Correcting Ledgers and 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 companies.

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 will 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: Solution Introduction

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. This comprehensive approach aims to streamline construction management processes, ensuring successful project outcomes.

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 suites 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.

Managing your Loan portfolio with Debt Manager

This class will help you unlock the secrets of effective debt management. Whether your debt is an asset or liability, Debt Manager can help you effortlessly track loans, automate loan processing and generate essential reports for your entire loan portfolio.

ScreeningWorks Pro: Overview

Attend this class to 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 Energy Suite: Overview

Learn how the Yardi Energy Suite can streamline utility billing, utility invoice processing and ESG reporting. The Yardi Energy Suite is an automated utility management system with no interfaces to third-party systems. See how the Yardi Energy Suite improves visibility to your energy data to help drive down controllable costs and increase asset value.

Yardi Procure to Pay: Solution 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!

Yardi Verification Services for PHA: Overview

Yardi Verification Services is the newest addition to the Yardi PHA Suite. Site staff can quickly request and receive critical income and asset verification directly into Voyager.