

RentCafe RightSource**ALCO ANNUAL AND INTERIM CERTIFICATION
END TO END OVERVIEW****Page 1****Page Content:**

{Narrator} Welcome to the RentCafe and RightSource Annual and Interim Certification End-to-End Overview. Our waitlist, move-in and annual/interim certification processes are powered by RentCafe and RightSource.

ALCO uses RentCafe to gather and verify applicant and resident information to determine Section 8 and Tax Credit eligibility. The RightSource software is used to obtain compliance approval for applicant and resident files.

{Instructions on Page} Start.

Page 2**Page Content:**

{Narrator} In this course you will,

- Complete a high-level overview of the annual and interim certification process.
- Differentiate between the various applications used for each action in the process.
- Highlight the job roles that perform each action in the process.


We invite you to review this journey before proceeding to the RCRS ALCO 300 Annual and Interim Certification Process eLearning course in ALCO Academy. Click next to proceed.

{Instructions on Page} Click Next.

Page 3**Page Content:**

{Narrator} Let's begin our journey by defining annual recertifications and interim certifications.

Residents receiving rental assistance through Section 8, Section 236, Tax Credit and HOME programs must complete an annual certification to verify their household composition, income, assets, and student status. All annual certifications are expected to be completed and signed, by the resident, 30 days prior to the recertification anniversary date.



Interim certifications are required when residents report any changes in household composition, employment, or income. Residents should proactively communicate these changes within 30 days. If the resident does not communicate updates and you become aware of changes that may affect program eligibility, interim certifications must still be created and processed.

{Instructions on Page} Click Next.

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Page Content:

{Narrator} Welcome to ALCO-NOPOLY! The goal of this game is to complete the annual and interim certification journey by reviewing each step and answering trivia questions.

To get started, pick one of the tokens listed below to start the annual and interim certification journey.

{Instructions on Page} Pick Your Token.

Page 5

Page Content: Game Board

{Narrator} Now that you have picked your token for ALCO-NOPOLY,

Start by clicking the dice button to proceed to the first move-in step.

{Instructions on Page} Push Button to Roll Dice.

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Page Content:

{Narrator} The annual and interim certification processes are similar with a few differences. Throughout this journey, I will highlight if a step applies to both or one certification type.

With an annual certification, the first step begins 120 days prior to the annual certification date for the resident. The site staff will run the EIV Income and Income Discrepancy Reports from the EIV system.

With an interim verification, the EIV Income and Income Discrepancy Report will be generated by the site staff when a resident communicates an update that may affect eligibility status.

Action: Run the EIV Income Report

System: EIV

Who Takes the Action: Site Staff

{Instructions on Page} Click the Next Button to Advance the Slide.



Page 7

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

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Page Content:

{Narrator} This step pertains only to annual certifications. After the EIV Income and Income Discrepancy Reports are generated, viewed, and researched; the site staff will generate notification letters to residents with upcoming annual certifications. The notification letters, as their name suggests, are the official notification provided to the resident to complete the annual certification.

Action: Generate and send notification letters (for annual certifications only)

System: Yardi Voyager

Who Takes the Action: Site Staff

{Instructions on Page} Click the Next Button to Advance the Slide.

Page 9

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

Page 10

Page Content:

{Narrator} Next, the site staff will screen all adult household members for annual certifications. A Sex Offender Search must be completed each year on all household members, age 18 and older.

For interim certifications, the screening step will be completed if the reason for the interim certification is the addition of an adult household member.

Action: Screen household (for annual certification always and interim certifications caused by the addition of household members)

System: RentCafe Site Manager

Who Takes the Action: Site Staff

{Instructions on Page} Click the Next Button to Advance the Slide.

Page 11

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

{Instructions on Page} You have landed on a community card. Click the arrow to proceed to the next screen for a tip.

Page 12

Page Content: Community Tip Card

{Narrator} The EIV Income Report, screening results and notifications letters will need to be uploaded to the annual certification in RentCafe Site Manager by the site staff. The EIV Income Report and screening results will be uploaded to the interim certification, by the site staff, when the reason for the interim certification is income change or addition of household members.

{Instructions on Page} Click Next.

Page 13

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

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Page Content:

{Narrator} Our next step in the journey takes us to the action in which the resident will complete the annual or interim certification. The resident will access your property's website and click the Resident login button to start and complete the annual certification or interim certification.

The button to start the annual certification will appear 120 days prior to the certification's due date. The button to start an interim certification will always be present for the resident.

Action: Complete annual or interim application

System: Resident portal located on your property's website

Who Takes the Action: Resident

{Instructions on Page} Click the Next Button to Advance the Slide.

Page 15

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

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Page Content:

{Narrator} Once the resident completes and submits the annual certification or interim certification, it will be viewable to the site staff in RentCafe Site Manager. The site staff will then review the details of the certification and start the verification process for income, assets, and expenses. Detailed instructions for how to generate verification letters and input verified data are covered in the next course.

Action: Review the certification and verify income, assets, and expenses

System: RentCafe Site Manager

Who Takes the Action: Site Staff

{Instructions on Page} Click the Next Button to Advance the Slide.

Page 17

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

Page 18

Page Content:

{Narrator} Please note that the next two steps can be completed as verifications are taking place or after all verified data has been entered into RentCafe Site Manager. The site staff will then countersign two documents in RentCafe Site Manager – The Household and Member Documents.

Action: Countersign Household and Member Documents

System: RentCafe Site Manager

Who Takes the Action: Site Staff

{Instructions on Page} Click the Next Button to Advance the Slide.

Page 19

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

{Instructions on Page} You have landed on a Trivia Card. To advance to the next annual and interim step, correctly answer the question that will appear on the next screen. The trivia questions are taken from the courses listed in your Week 1 and Week 2 learning plan. Click the arrow.

Page 20

Page Content: Trivia Card

{Narrator} How many federally protected classes are recognized by HUD?

- a. 5
- b. 8
- c. 7
- d. 6

{Instructions on Page} Click One of The Answer Choices Listed Above.

{Instructions on Page} Click Next.

Page 21

Page Content: Sorry...Try Again

{Narrator} Oops, try again. You seem to have gotten the wrong answer. Push the button to roll the dice! You will need to roll a double to proceed to the next step. Good Luck!

{Instructions on Page} Click Try Again.

Page 22

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

Page 23

Page Content:

{Narrator} Congratulations! You have made it to the halfway mark in your journey!!! Now the certification is ready to be submitted to RightSource. RightSource is the third-party compliance company used by ALCO to review all certifications to determine if the certifications continue to meet the eligibility and compliance standards. The site staff is responsible for sending the certifications to RightSource for review and approval.

Action: Submit the annual or interim file

System: RentCafe Site Manager

Who Takes the Action: Site Staff

{Instructions on Page} Click the Next Button to Advance the Slide.

Page 24

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

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Page Content:

{Narrator} Once you submit the certification to RightSource, you will correct any issues that may affect the resident's eligibility or compliance with program standards.

Action: Correct any findings

System: RentCafe Site Manager

Who Takes the Action: Site Staff

{Instructions on Page} Click the Next Button to Advance the Slide.

Page 26

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

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Page Content:

{Narrator} Once all findings are corrected, you will send your property's program documents – either the Section 8 program documents (59) and, or the tax credit program documents (Tenant Income Certification or Tick) to be signed electronically by the resident.

Action: Send TIC and 50059 to Resident for Signatures (after file is approved)

System: RentCafe Site Manager

Who Takes the Action: Site Staff

{Instructions on Page} Click the Next Button to Advance the Slide.

Page 28

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

{Instructions on Page} You have landed on a Trivia Card. To advance to the next annual and interim step, correctly answer the question that will appear on the next screen. The trivia questions are taken from the courses listed in your Week 1 and Week 2 learning plan. Click the arrow.

Page 29

Page Content: Trivia Card

{Narrator} Which of the following is the least successful at promoting a culture that values diversity?

- a. Understanding
- b. Utilizing
- c. Appreciating
- d. Tolerating

{Instructions on Page} Click One of The Answer Choices Listed Above.

{Instructions on Page} Click Next.

Page 30

Page Content: Sorry...Try Again

{Narrator} Oops, try again. You seem to have gotten the wrong answer. Push the button to roll the dice! You will need to roll a double to proceed to the next step. Good Luck!

{Instructions on Page} Click Try Again.

Page 31

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

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Page Content:

{Narrator} The resident will electronically sign the required documents by accessing the Resident Login from your property's website.

Action: TIC and 50059 Are Signed

System: Resident portal located on your property's website

Who Takes the Action: Resident

{Instructions on Page} Click the Next Button to Advance the Slide.

Page 33

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

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Page Content:

{Narrator} Another key document that will be signed by the resident is the property's renewal lease, if applicable. The lease will be executed by the site staff in Yardi Voyager and generated for electronic signatures in RentCafe Site Manager.

Action: Execute and Generate Lease (for annual certifications only)

System: Execute (Yardi Voyager), Generate (RentCafe Site Manager)

Who Takes the Action: Site Staff

{Instructions on Page} Click the Next Button to Advance the Slide.

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Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

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Page Content:

{Narrator} The resident will proceed back to the Resident Login from your property's website to electronically sign the lease.

Action: Lease Signed (for annual certifications only)

System: Resident portal located on your property's website

Who Takes the Action: Resident

{Instructions on Page} Click the Next Button to Advance the Slide.

Page 37

Page Content: Game Board


{Instructions on Page} Push Button to Roll Dice.

{Instructions on Page} You have landed on a Trivia Card. To advance to the next annual and interim step, correctly answer the question that will appear on the next screen. The trivia questions are taken from the courses listed in your Week 1 and Week 2 learning plan. Click the arrow.

Page 38

Page Content: Trivia Card

{Narrator} A Drug-Free Workplace Program is a company-driven application of policies and activities designed to provide a safe workplace, encourage wellness, and educate employees on the problems linked to substance abuse.

- 
- a. True
 - b. False

{Instructions on Page} Click One of The Answer Choices Listed Above.

{Instructions on Page} Click Next.

Page 39

Page Content: Sorry...Try Again

{Narrator} Oops, try again. You seem to have gotten the wrong answer. Push the button to roll the dice! You will need to roll a double to proceed to the next step. Good Luck!

{Instructions on Page} Click Try Again.

Page 40

Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

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Page Content:

{Narrator} Now that the program documents and lease have been signed by the resident, the site staff will countersign each document within RentCafe Site Manager.

Action: Countersign the 50059, Lease (For Annual Certifications) and TIC

System: RentCafe Site Manager

Who Takes the Action: Site Staff

{Instructions on Page} Click the Next Button to Advance the Slide.

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Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

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{Narrator} For annual certifications, you are required to conduct annual housekeeping inspections of the units and complete them prior to the resident's annual certification date. The form to be used as a guide and signed is the Annual Unit Inspection Form, also known as the Multifamily Unit Inspection form, which is generated automatically with the RentCafe annual certification paperwork and can also be accessed from Yardi Voyager.



Action: Complete and Upload Annual Unit Inspection Form (for annual certifications Only)

System: RentCafe Site Manager

Who Takes the Action: Site Staff

{Instructions on Page} Click the Next Button to Advance the Slide.

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Page Content: Game Board

{Instructions on Page} Push Button to Roll Dice.

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Page Content:

{Narrator} Next, you are ready to submit the certification once more to the RightSource team. The RightSource team will complete a final review, notify you of any issues, and then finalize the certifications in Yardi Voyager by entering sign dates.

Action: Submit the Certification or Interim File

System: RentCafe Site Manager

Who Takes the Action: Site Staff

{Instructions on Page} Click the Next Button to Advance the Slide.

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Page Content:

{Narrator} Congratulations! You have completed the Annual/Interim Certification Process Journey. We hope that this course has provided you with a high-level overview of the annual and interim certification process, the key players involved, and the systems used to power this process. We recommend that you now complete the RCRS ALCO 300 Annual and Interim Certification Process eLearning course for an in-depth demo of each action in the process.

{Instructions on Page} Click Complete.

Training Complete.