HOUSINGMANAGER.COM

Table of Contents

Part 1 – Manage the Waiting List

Initial Setup

If the user currently has Lindsey Software as their housing software, the initial setup process can be streamlined. The customer's waiting list(s) can be automatically pushed to HousingManager.com once the purchase is made.

Verify Waitlist Settings in Lindsey

To update and/or make changes to a waiting list in Lindsey Software open the Tenant Applicant Processing Module. *Select* **Maintenance - Waitlist Definitions** from the main menu. Once changes are made be sure and select the Save icon.

> The user can add a new waiting list or update any preferences and preference points by selecting the waiting list from the list.

Waiting List Definitions

Exit	Save	Clear Preference	Add	Delete	

Waiting Lists

Waiting List Code: A

A - Low Rent Waiting List
B - Section 8 WL

Description: Low Rent Waiting List
Program Type: 7 = Low Rent/Conventional
Income/Rent Table: PH102   - PH $50 MIN RENT TA

Weight Active Tenants: ☑ Add active tenants housed in associated PHAs to the top of the waiting list

Use Broad Range: ☐ Check for yes

Point Value: 0

Select PHAs
☐ 1
☐ 10
☐ 11
☐ 12
☐ 13
☐ 14
☐ 15
☐ 16
☐ 17
☐ 18

Local Preferences

☐ Only use the highest preference

Code	Description	Points
KV	Katrina Victims	4
GN	GC NonWork Fam/Single	2
GW	Extra 123	3
NG	Extra	1

Any new wait lists or preferences will need to be entered prior to opening a wait list online with HousingManager.com.

Initial Sync

To initiate the initial push of the Waiting List(s) from Lindsey Software to HousingManager.com, access the Tenant Applicant Processing Module (TAP) from the Lindsey Software toolbar. *Select* the HM Applicants icon from the main menu.

Step 1
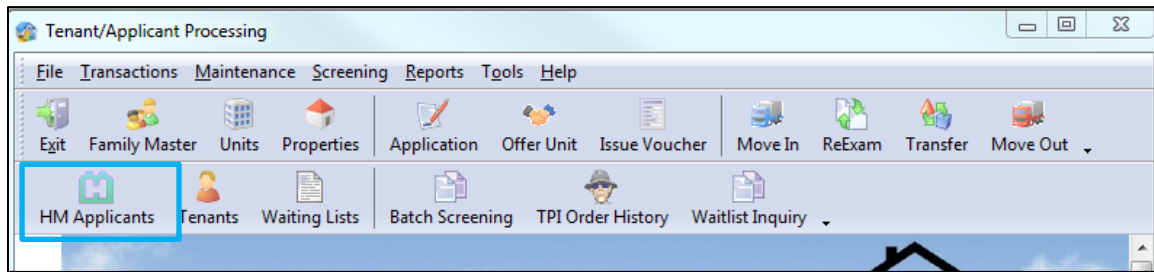
Next, *select* the "Download" icon from the Online Applicants menu. This will automatically push all active Waiting List(s) currently active in Lindsey Software to Housing Manager.com. Waiting list preferences will be included as part of this push.
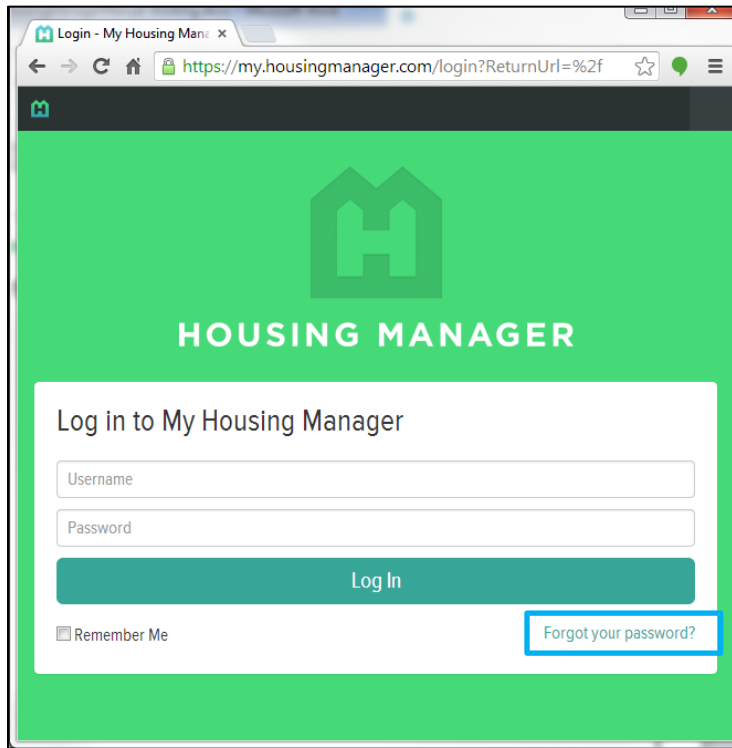
Step 2
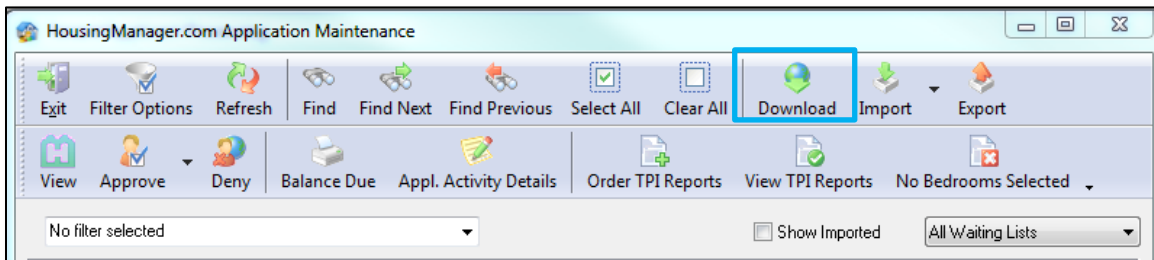
Note: The first time this process is done the software may take a few minutes or longer. Please be patient and do not cancel the process.

Opening the Waiting List in HousingManager.com

To open a Waiting List online, navigate to My.HousingManager.com. The Administrator user will need to enter their appropriate log in information.

Enter the Username and Password to login.

Select the "Forgot your password?" link to enter email address and create a new password for the account.

The user will see their waiting list(s) upon logging in. This information is pulled from the software during the initial sync. The main menu is referred to as the "Properties" menu. Notice that on the first sync ALL waiting lists will display as "Scheduled".


Select the Waiting List to open the Properties Configuration Menu. There will be no applicant information since the waiting list has not yet been open online to residents.

Waiting List Properties Setup

Within the Waiting List Properties Menu *select* the configuration tool icon to edit the Waiting List. This is located on the right corner of the wait list header menu.
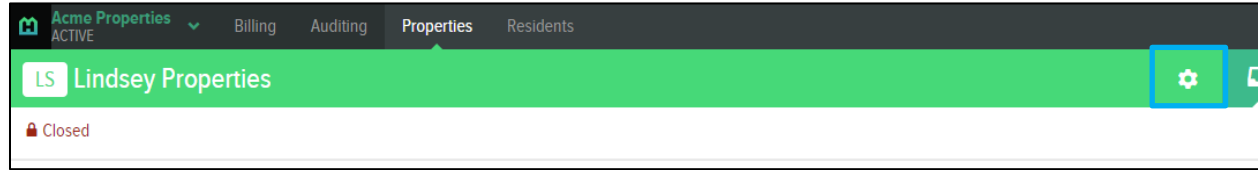
The user will have two areas they can edit on the Waiting List – Property Setup and Waiting List Setup.

Property Setup

If the waiting list was created in Lindsey Software, the user will have to edit the waiting list information through the Waiting List Definitions in Tenant Processing Module.

Update the physical address of the property if needed since this is NOT pulled from Lindsey Software.

Waiting List Setup / Bedrooms Sizes

The next section outlines the criteria for the selected waiting list.

Enter a minimum age for the applicant for the Waiting List if needed.

If the applicant is not of minimum age, but is disabled and could still qualify, *select* the "Override if disabled" checkbox.

An example of using the Minimum Age feature would be regarding Elderly and/or Disabled applicants. Should the Housing Authority have a waiting list specifically designated for Elderly, the user could make the Minimum Age 56. This would prevent anyone under the age of 56 from applying for the Elderly waiting list.

Age of individuals to be included in occupancy calculations.

| 12 Months and Older | 0 Months Old | **Unborn** |

☐ Children [4] years of age or younger should share room.

☐ Same gender children [4] years of age or younger should share room.

For any youth under the age of 18, users will need to configure bedroom size options based on their Admin Policy.

Age to include: select whether to allow applicants to enter children 12 months and older, 0 months, or unborn children. Some housing programs may not allow for unborn children to be counted.

Bedroom sharing: Select the checkbox to allow children of a set age to share a room. If the Admin Policy requires same gender children ONLY to share a room, select the checkbox for that option as well.

Unit Occupancy Restrictions

	Min Occupants	Max Occupants
☑ 0 Bedrooms	1	1
☑ 1 Bedroom	1	2
☑ 2 Bedrooms	2	4
☑ 3 Bedrooms	3	6
☑ 4 Bedrooms	4	8
☑ 5 Bedrooms	5	10
☐ 6 Bedrooms	6	12
☐ 7 Bedrooms	7	14

Next, *select* the bedroom size checkboxes that pertain to the available wait list bedroom sizes. (Blue is activated, Grey is not).

HousingManager.com will automatically fill out the minimum and maximum number of occupants per bedroom size based on HUD guidelines. Should the Housing Authority choose to override these standard bedroom size occupants, the user can key in their correct number of minimum and maximum occupants.

For example, a 2 bedroom unit would be a minimum of 2 with a maximum of 4 occupants.

To officially open the waitlist online, users must select the settings needed. To keep the wait list on 24/7, select "Always Open". To limit applicants by date range, select "Date Range".

To open the waitlist and only take a maximum number of applicants, choose "Max Applicants". If needed to open a lottery type waitlist, select the "Lottery" option.

Acceptance Settings

◉ **Always Open**	You will be able to open and close this list manually.
○ **Date Range**	Limit applications with a start and end date.
○ **Max Applicants**	Limit the number of applicants.
○ **Lottery**	Date range with the ability to run a lottery to select applicants.

Preferences

All waitlist preferences set up in Lindsey will sync over on the initial setup/download. The online application preference questions can be set up as automatic or as a custom question. In order for the applicant to understand clearly what the preferences are, users can modify preferences by adding a question in the text space provided.

To use the preference be sure the checkbox is selected next to the preference needed.

Automatic Questions:
For Automatic questions on preferences, the user will have 4 options to choose from on the question drop down menu.
1. If Head, Co-Head or Spouse has a job and receives wages.
2. If Head, Co-Head or Spouse is elderly or disabled.
3. If Head, Co-Head or Spouse is disabled.
4. If Head, Co-Head or Spouse is elderly.

For the preference below, the default automatic preference question on the application will be that the applicant can receive the preference points for GC Work/E/D/Singles IF the Head, Co-Head or Spouse is disabled.

Custom Questions:
For Custom preference questions the user will manually enter a question that will display for the preference on the application.
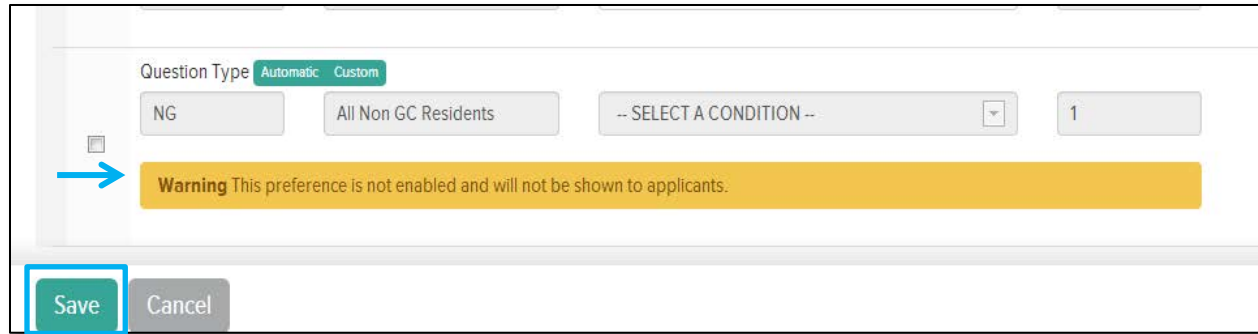

Note: ALL preference questions need to be entered and completed BEFORE the waiting list is opened or they will not be visible to the applicant.

Tip: If a preference is not selected to display on the application, the user will see the below Warning message.

Be sure and save the preference questions!

Opening the Waiting List

Once all sections of the Wait List Setup have been configured the user is now ready to open the waiting list. Scroll to the bottom of the settings page and *select* the "Open Waiting List" icon.

Once the waiting list is opened, the user will see the following message. This means that the waiting list will need to be closed in order to edit or change any settings.
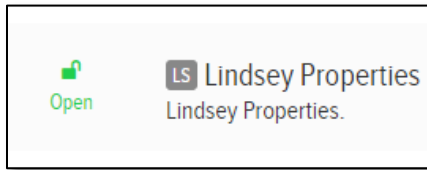
Property Setup

🔒 Settings are currently locked.
You can not edit an application form while it is accepting applications.

How to Make Changes to a Lindsey Software Waiting List

Closing an Online Waiting List

Prior to adding, editing, or removing preferences on a waiting list, the user MUST close the waiting list on HousingMangager.com.

To close, navigate to My.HousingManager.com and *select* the waiting list to close on the Properties menu. Then *select* the waiting list "Settings" icon to edit the property.
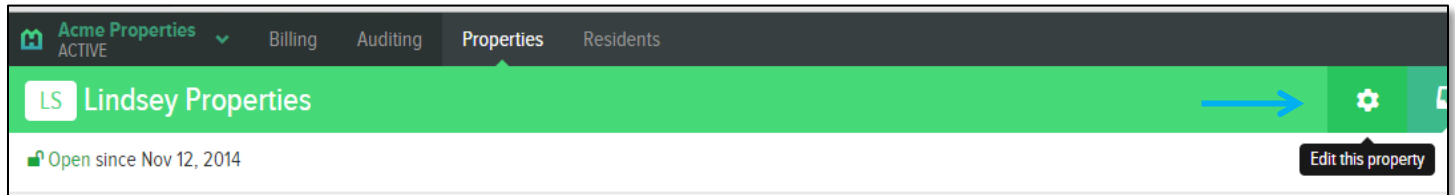
**Scroll to the bottom of the webpage and *select* the "Close Waiting List" icon.**
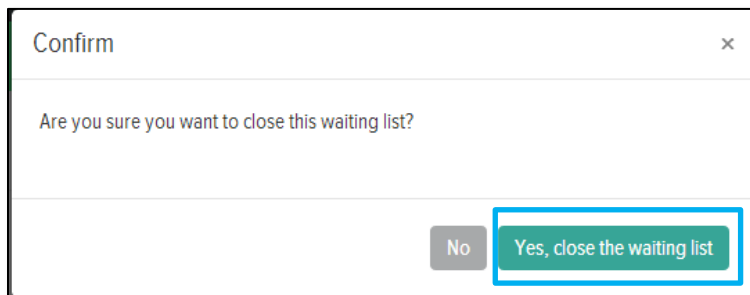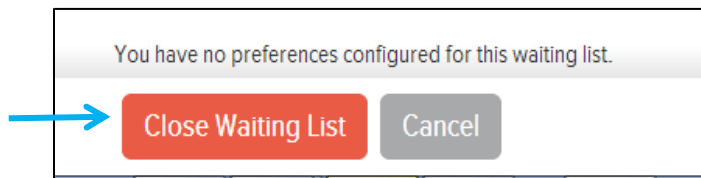
The user will need to confirm the waiting list is closed by *selecting* "Yes, close the waiting list".

The waiting list will now appear as closed on the Properties menu. The user is ready to update and/or make changes to the waiting list in Lindsey Software.

Part 2 – Online Applications (Application Entry)

The online applications portion of HousingManager.com is where the applicant will log on to fill out and submit an application for housing. This website will be directly interfaced with your current website and can be accessed from there or by directly navigating to the website. *Note: This website will be given to the Housing Authority upon purchase and will be unique for each Housing Authority.*

Below is what the applicant will see when first logging on to the Housing Authority's HousingManager.com webpage.
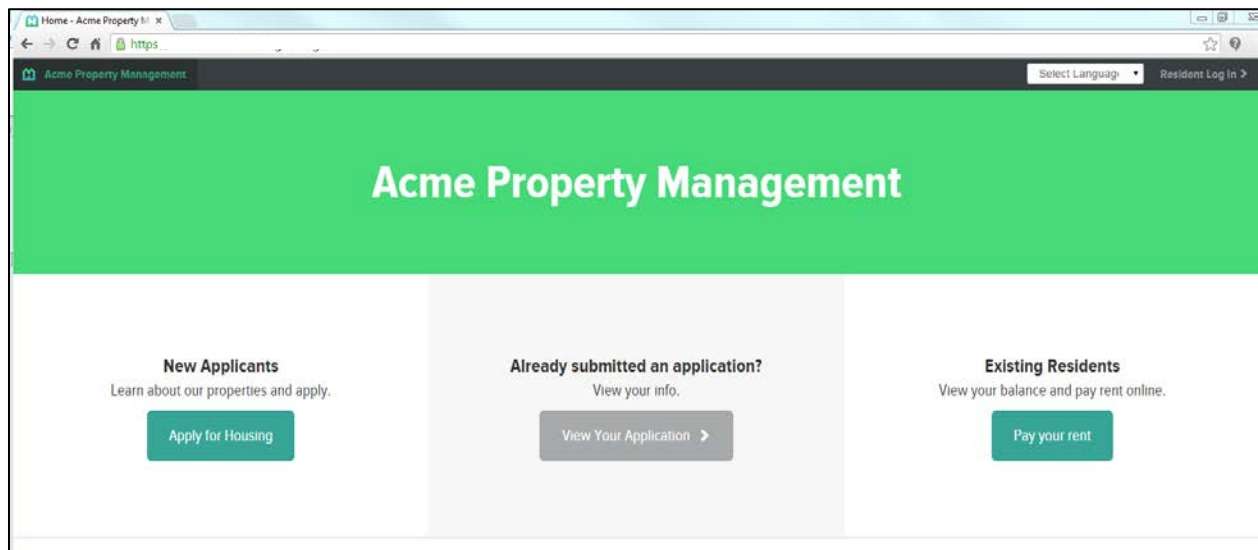
How to Enter a New Application

To begin, the applicant will select "Apply for Housing" if applying for the first time. If editing the app, the applicant can select "View Your Application."

Once selected, residents will see the Landing Page information. The applicant will need to read the information carefully then select "Apply for Housing."
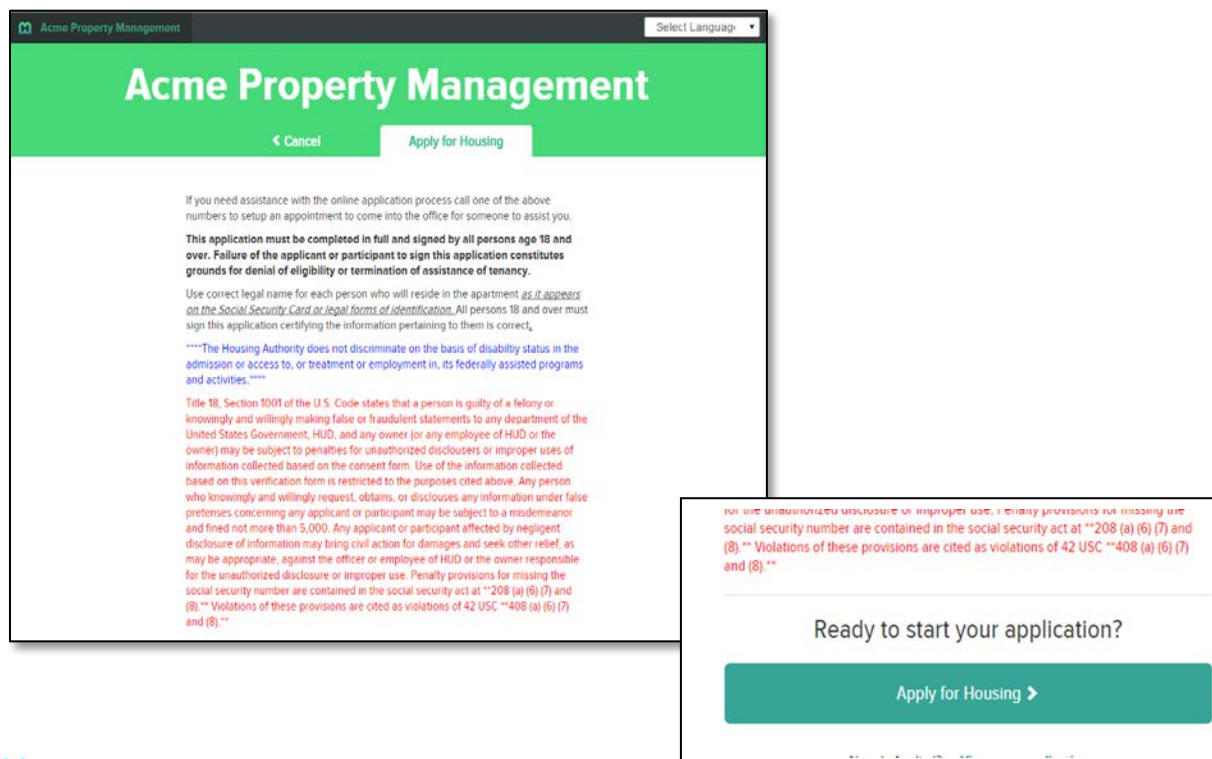
The applicant will begin the application by entering in the head of household's Social Security Number, Date of Birth, and Last Name.

Select "Get Started" to begin.

Step 1 – Tenant will Choose the Waiting List(s) to Apply for

The applicant will check each wait list that they wish to apply for and is currently taking applications.

Based on waiting list(s) the applicant selected, a message will appear that states what qualifications the applicant must have.

The applicant will then *select* "Continue" to move to the next step of the application.

Step 2 – Enter Head of Household (Applicant) Information

Based on the information entered when the user began their application, the Last Name, Social Security Number, and Date of Birth will already be completed on the Head of Household page.   The applicant will just need to enter their remaining information.

Head Of Household

My Application

14% Complete

✔ Properties
Household Members
👤 Head of Household
Misc Info
Confirm

Personal Information

First Name	Middle Name	Last Name
Susie		Haney

SSN	Date of Birth
867-22-1234	01/01/1980

Gender
Female

☐ Handicapped/Disabled

The applicant will need to select their Race and Ethnicity (if this is an option under the waitlist settings).

Race and Ethnicity

☑ White
☐ American Indian or Alaskan
☐ Black
☐ Asian
☐ Hawaiian/Pacific Islander
☐ Other

Ethnicity
Not Hispanic or Latino

Physical Address

Street #	Street Name	Unit #
123	Super St.	

City	State	Zip	County
Searcy	Arkansas	72143	--County--

Mailing Address

☑ Same as Physical Address

The applicant will need to enter their Physical Address.

Select the "Same as Physical Address" if the Mailing Address is the same.

Have the tenant enter their contact information, up to two phone numbers as well as an email address. (optional)

Select "Continue" to move to the next step of the application.

Contact Information

Phone 1		Phone 2	
Home	(501) 111-1234	--Type--	(###) ###-####

E-mail Address	Confirm E-mail Address
applicant@lindseysoftware.com	applicant@lindseysoftware.com

Continue ❯

Next Step:
Tell us about the Head of Household's Finances

Step 3 – Finance Information

Part of a HUD Waiting List application will be for the applicant to list any sources of Income, Expenses, and Assets. The Housing Authority will have the option to add additional questions on the application if needed. *Note: the only finance information that will pull into Lindsey Software is Income, Expenses, and Assets.*

1. Income

Rental Application

My Application

Started Wednesday, November 12, 2014 2:27:17 PM

37% Complete

✔ Properties
✔ Household Members
✔ 👤 Susie Haney
Member Finances
Member Additional Info
Misc Info
Confirm

Finances for Susie Haney

Income Sources

List all sources of income for Susie Haney.

Type	Source	Address	Monthly Amount	
NonWage Income	Mom		$100.00	Edit
		Monthly Total:	$100.00	

+ Add an Income Source

- To add an income source, select the "Add an Income Source" link. The applicant will have the option to choose from the HUD standard sources of income. Repeat this process for each income source and enter the monthly amount.
- The income type, amount, and the source of income will download into Lindsey Software. The software will then auto create an employer record for any income that has employer information.
- If no income, the applicant can bypass by selecting "No income".

2. Expenses

Expenses

List all recurring monthly expenses listed in expense type(s) below for Susie Haney.

+ Add an Expense

To add an expense to the application *select* the "Add an Expense" icon.

The applicant can *select* the Expense Type from the drop down menu. For Housing Authority clients, any customized Expense Type **WILL NOT** import. Based on HUD regulations only specific expenses can be counted.

Enter the monthly amount of the expense as well as a brief description.

Expenses

List all recurring monthly expenses listed in expense type(s) below for Susie Haney.

New Expense

Expense Type
Medical Expense

Monthly Amount
$ 50

Description
Medication

Add Expense Cancel

- Repeat this process for each expense for the applicant.

3. **Assets**

If the waitlist is configured to allow the tenant to list assets, they will need to select the "Add an Asset" option. Applicants will list a description, value, and monthly amount (if any) of the asset.

Assets

List any assets Susie Haney owns that generate monthly income.

Description	Total Value	Monthly Amount	
Savings	$ 10,000	$ 10	✖

+ Add an Asset

4. **Automobile (Optional)**

The Housing Authority can elect to have the applicants enter automobile information on their application. This information, however, will not download into Lindsey Software.

Automobiles

List any automobiles that Susie Haney owns.

Year	Make	Model	License Plate	
2006 ▾	Ford	Focus	123456R	✖

+ Add an Automobile

Step 4 – Applicant History

This section of the application is customizable and the Administrator can choose to include or exclude items. ***None of the information in this portion of the application will transmit to Lindsey Software.***

The applicant will need to complete the background history information the Housing Authority displays on the application.

For Criminal History, *select* "Add" or "No Criminal Charges". This should be any information that could be found in a criminal report. *It is required that the applicant select "No Criminal Charges" if it does not apply.*

For Federal Housing History, the applicant can list any previous Federal Housing addresses that may show on a Landlord History report or any balances that may still be owed.

Another option for the applicant is to fill out their previous housing history, such as apartments or other commercial rentals.

Select "Continue" to move to the next section of the

Step 5 – Terms to Accept (General)

The Housing Authority can add a Terms to Accept section of the Application. This is a blanket acceptance section that the Housing Authority can customize from My.HousingManager.com.   In order to conitnue to the next section of the application, the applicant must agree to the terms.

Step 6 – Adding Aditional Household Members

Thanks, we have your information.

Are there more people who will be living with you?

This can include spouses, children, family members, roommates.

○ No, take me to the next section.

⊙ Yes, I need to add more members.

Continue ❯

Next Step:
Tell us about your other household members

If there are additional tenants on the application, the user will need to add each of the family member's by selecting the "Yes, I need to add more members" option.

If there are no additional household members, *select* the "No, take me to the next section" option.

Select "Continue" to begin entering the family members.

Additional Member

Personal Information

First Name: John
Middle Name:
Last Name: Smith

SSN: ###-##-####
Date of Birth: 01/01/2008
Relation to Head of Household: Youth under 18

Gender: Female
Student Status: Full-Time Student

☐ Handicapped/Disabled

Aliases

List any alternate names used in the last 10 years.

➕ Add an Alias

Enter the additional family member's information. The Social Security Number field is an optional required field that can be activated / de-activated on the administrative side of HousingManager.com. However, by making the SSN required it will prevent the user importing into Lindsey Software without a SSN.

Relation to Head of Household

Youth under 18

--Relationship--
Spouse
Co-Head
Other Adult
Full-Time Student 18+
Foster Child
Live in Aide
Youth under 18
Unborn Child

Each family member must have a relationship status to the Head of Household. For certain HUD programs, an unborn child can be considered as an applicant. If so, the SSN required must be de-activated.

The applicant will need to complete the additional family member's information for Race and Ethnicity *(which is required for Lindsey Software)* as well as any updates for the physical address and contact information.

Select "Continue" to add any financial information for the added family member.

Continue through the application process for each family member that is added. The user will need to add Financial Information and Background History for each family member. Once all members have been added, *select* the "No, take me to the next section" option.

Step 7 – Emergency Contact Information

The applicant will have the option to enter an Emergency Contact or to bypass this section. *Select* "Continue" once the Emergency information is entered or if the applicant bypasses this section. *This information WILL NOT import into Lindsey Software.*

Step 8 – Miscellaneous Information Section

The first part of the Misc. Info Section is in regards to Bedroom Sizes for the waiting list(s). The Housing Authority has the option to allow the applicant to select their bedroom size; however, the Housing Authority can still prevent the applicant from selecting bedroom sizes that they typically would not qualify for.

Bedroom Size Tips:

- Low Rent Waiting Lists MUST have a bedroom size in HousingManager.com to prevent the user from having to update each application manually in Lindsey Software. This is because, *without a bedroom size for Low Rent the applicant will not be placed on a waiting list.*

Based on the setup for the application, the applicant will see a message similar regarding the selection of bedroom sizes. For example, if a 5-person household applies for a 1 bedroom unit, they will receive a message stating the choice is unavailable. This is based on how the "Max Applicants" option on the admin side is configured.

The Housing Authority will have the option to customize their own questions for the application. This is called "Customized Questions" and will be on the online application but will not give a weight to the application itself. The user will have the ability to add, edit, and remove the customized questions on the administrative HousingManager.com site. *However, the applicant cannot continue until the questions are answered*.

Additional Questions

Has any member of your household ever been arrested? If yes, When and for what? — No / Yes

Are you a full time student? If yes, Where and expected completion date. — No / Yes

Are you disabled? — No / Yes

Do you own a car? — No / Yes

Do you own any real estate? — No / Yes

Have you sold any real estate in the past two year? If yes, When and how much? — No / Yes

Has any member of the household ever been convicted of a crime other than a minor traffic ticket? If yes, When, who and for what? — No / Yes

> The applicant will answer the questions listed on the application.   Some questions may require an explanation. If so, the tenant will answer in the space provided.
>
> *This information will not be transferred to Lindsey Software.*

Step 9 – Review and Confirm Application

Applicants will need to confirm and review their application before submitting to make sure everything is listed correctly.

Once the applicant *selects* "Submit" they will receive a confirmation message. The applicant can review, print, or edit their application or sign out.

2-Step Verification

The applicant will be asked if they would like to set up a 2-step verification process. This process will help by making it harder for other people to access the application and change any data by requiring an extra verification step. In order to edit an existing application, all that is needed is the applicant's SSN, Date of Birth, and Last Name. The verification process will then add in an email account – which sends a verification code to the account's email – or a mobile phone number – which will text an access code.

Set Up 2-Step Verification

All we need is an email account **or** or mobile phone number that only you have access to.

You have already given us this info, so we've gone ahead and pre-filled in the options. Check to make sure they look correct or make changes if needed.

Email Address

applicant@lindseysoftware.com

Confirm Email Address

applicant@lindseysoftware.com

Mobile Number

(###) ###-####

Confirm Mobile Number

(###) ###-####

The mobile device assigned to this number must be capable of receiving text(SMS) messages. Standard text messaging rates apply. See your carrier's policy for info about costs associated with your plan.

Why 2-Step Verification?

Your application can be accesed by anyone with your name, Social Security Number, and date of birth.

It's relatively easy these days for a stranger to get this information, but even easier for someone you know. 2-Step Verification makes it harder for other people to access your application and change your data by requiring an extra verification step.

How does it work?

How does it protect me?

[Set Up 2-Step Verification]   or   [Skip]

How Can an Applicant Edit Their Application?

Once an online application is submitted, the applicant still can make changes to their application. To do so, they will navigate to the HousingManager.com website established at the Housing Authority.

The applicant will need to select the "View Your Application" option.
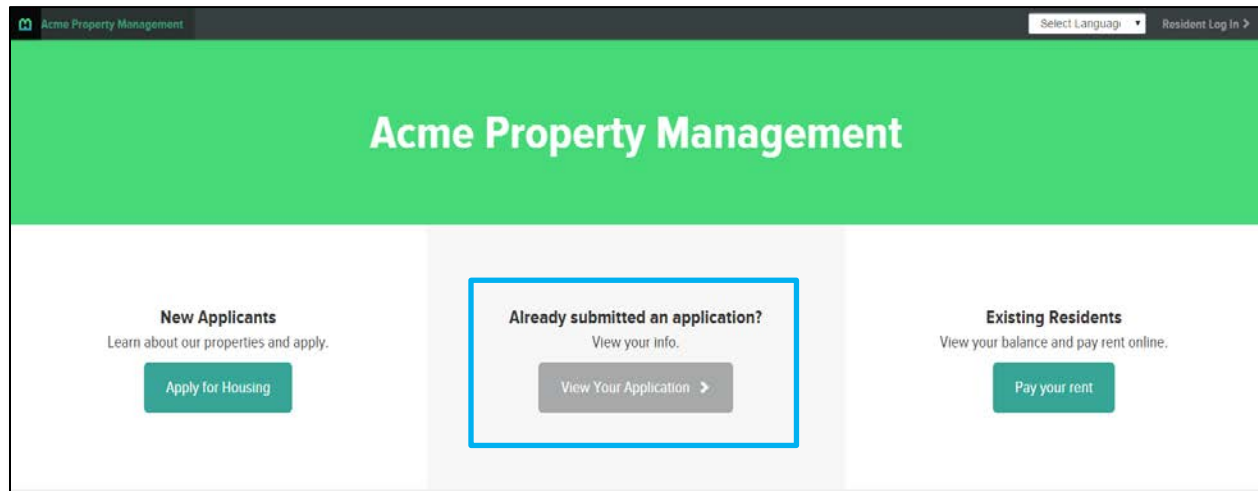
If the applicant is using the 2-step verification option, the next window will display their verification code options.

Once the code is received, the applicant will enter the code to continue.

This will take the applicant to the application status menu. From here, they can update by *selecting* "View Application".

- To edit the existing application, the user can select "View Application."
- If any new waitlists have been open since the time the tenant applied previously, they will be able to select "Apply Now" to add their application to any new waitlist.

If using *My Waiting List* applicants will be able to see their waitlist position online under "Status."

Part 3 – HousingManager.Com Administrative Settings

Logging In

The Administrator for HousingManager.com at the Housing Authority will need to navigate to the administrative webpage and log in to update certain application information.
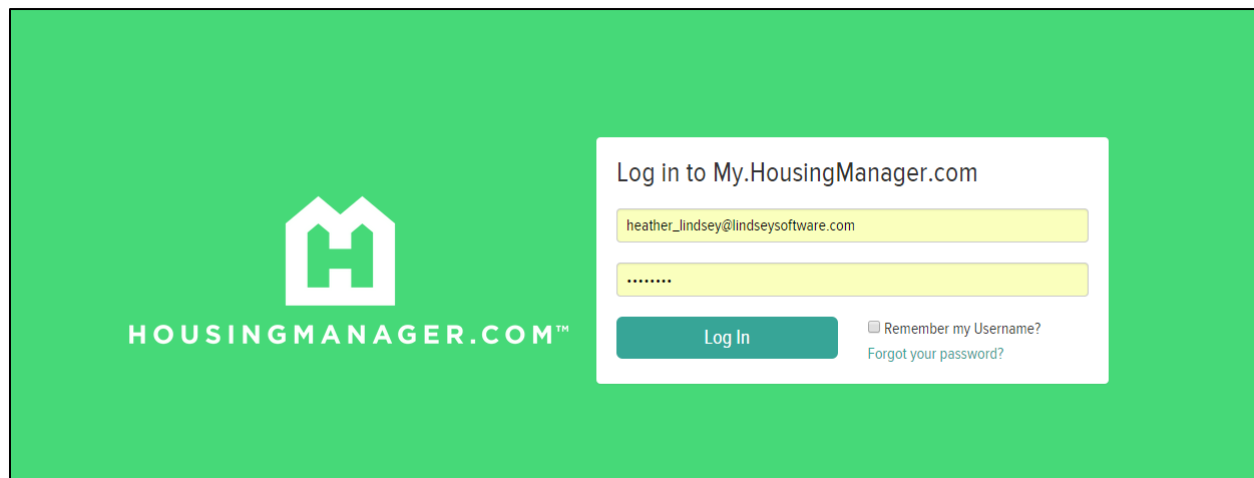
Navigating the Main Admin Page

Once the user is logged in, the main page will display a list of all waiting list properties whether they are open, scheduled, or closed.
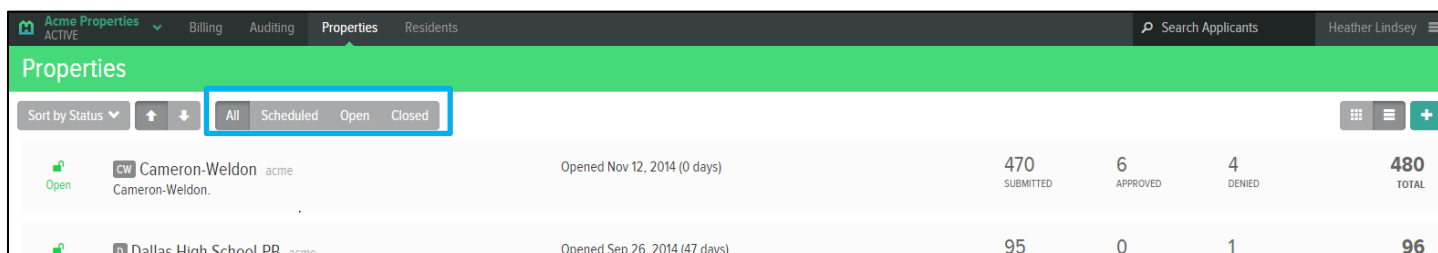
The user can *select* the "Sort by Status" to sort by Status of a Property (Waiting List), Name of the Property (Waiting List), or by the number of applications taken.

Use the view icons to change the layout of the main menu.
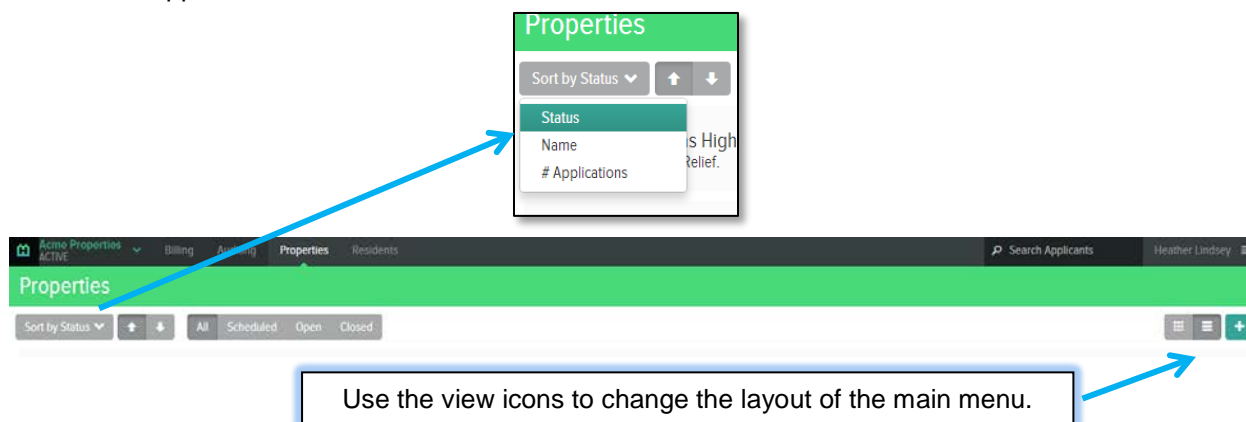
HousingManager.com Settings

To update information regarding the online application webpage, the administrator will need to *select* the *Settings* option under the Account Name on the top right corner.
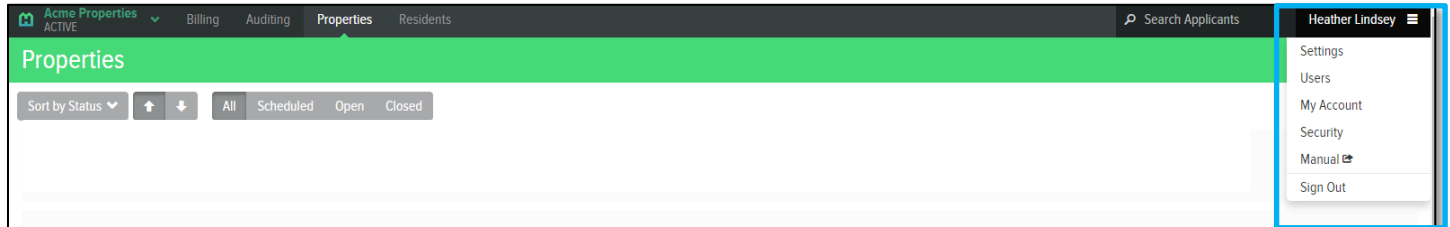
Company Profile

- ### Basic Settings

The first menu under *Settings* is the HousingManager.com Company Profile is the Basic Settings section. Here, the administrator can update the Company Name as well as the Time Zone for the applications. *Note: This information is typically set up during initial training.*
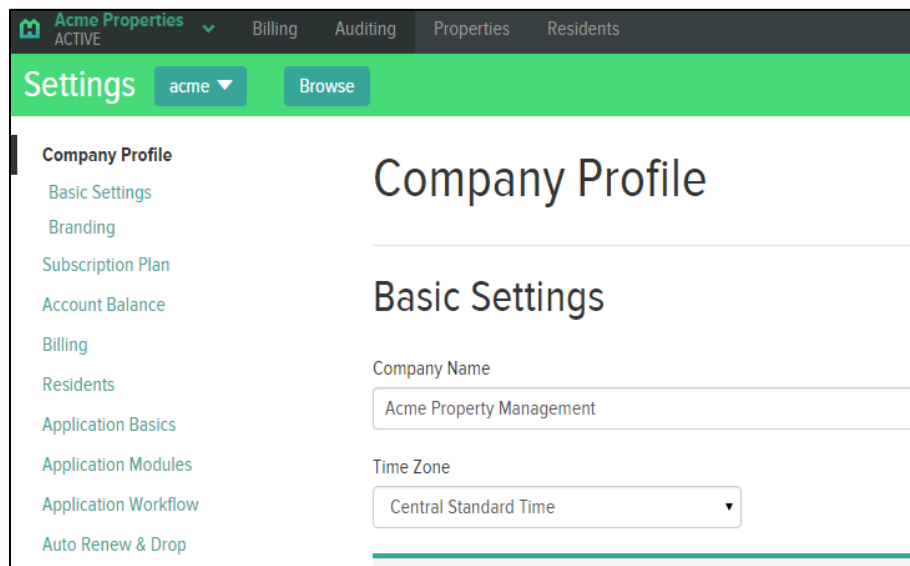
- ### Application Fee Settings (Optional)

To enable an application fee to residents, select the checkbox and enter the fee amount.

Enter the application fee amount in the space provided. This will prompt the applicant to pay the fee online once the application is completed.

- Support Contact

For any support information, the agency must enter a support contact. This will be the point of contact for applicants with questions. There can be up to two separate phone numbers for the support contact.

- Branding

The administrator will have the ability to add or change their HousingManager.com logo image at any time. To do so, *select* the "Upload Logo" button in the Basic Settings page. Be sure and save any changes made to the logo in order for it to appear on the main HousingManager.com site.

Browse for the file after *select*ing "Upload Logo". The image will then display in the Company Logo box.

Click to remove logo.

Application – Basics

- Application Permissions

This section gives the applicants permission to edit applications or remove themselves from a waitlist. These settings will affect any property waitlists that are active on HousingManager.com.

Select either checkbox that applies.

- Enhanced Application Security

This option will allow the agency to require, or make optional, a 5-digit security code that can be sent to the applicant's mobile phone or email when attempting to log into their application. This 2-step verification process is highly recommended since Social Security Numbers are involved.

- Before the applicant starts…(Landing Page)

The Landing Page is the main home page content that welcomes the applicants, and allows the Housing Authority to list any directions and/or important information/notices that the applicant will need to be made aware of. This information is set up with the administrator at the initial training.

The user can make any changes to the text when/if needed (It works the same way as Microsoft Word). The administrator can also add hyperlinks to other necessary HUD forms through the Landing Page.

Application Modules

This section of the application settings pertains to the application information and what the applicant will see when applying.

- Properties

To allow the applicant to select bedroom sizes for any non Section 8 waitlist, the user will want to select the "show bedrooms needed" checkbox.

- Household Personal

To configure any household information on the application, the administrator can customize the settings regarding household members.

Select each option that applies to the application.

Please note that if not requiring SSN for all household members, and the application is downloaded into Lindsey Software, the user will have to input the information in order to edit the application in the software OR to move the applicant into a unit or property.

- <u>Household Financial</u>

The agency can select what financial information to ask the applicant on their application pages. For Lindsey Software users only Income, Expenses, and Asset information will be imported into the software. Automobile information will display on the online application only.

Select each checkbox to include the financial information on the application form. Uncheck the box to remove it.

- <u>Household History</u>

For residency history, users can elect to ask for criminal history, previous housing history, as well as for previous address information. Uncheck the options to remove the section from the online application. *This data does not show in Lindsey Software.*

- <u>Emergency Contact</u>

If needed, the application can ask residents for an emergency contact. Users will be asked to enter an emergency contact but can choose to bypass if no contact exists.

- <u>Misc Info</u>

This section is designated for all other options that may be a part of the online application. These options affect ALL waitlists.

Misc Info

☑ Preferences

☑ Custom Questions

> Do you currently own any real estate property?
> ☑ Require Explanation if [Yes] [No]

> Do you currently own an automobile?
> ☐ Require Explanation if [Yes] [No]

+ New Custom Question

> To include preference options on waitlists keep the "Preferences" box selected.
>
> For custom questions, the admin can set up as many questions as needed that require the applicant to either answer "Yes / No" or to provide further detailed explanation. *These questions are not weighted on the application.*

☑ Accessibility Options

> WheelChair

+ New Accessibility Option

> Select the "New accessibility option" to add any features that an applicant would need to notify the agency about. For example: wheelchair access, first floor, hearing impaired, etc.

☑ **Terms of Agreement**

> Do you agree that upon being selected for this Lottery, once called in to Certify personal and Legal Information you will be truthful?
>
> [Application] [All Adults]

> Do you agree that at anytime you are found to have not been truthful during Certification Time, your application will be none and VOID
>
> [Application] [All Adults]

> [Application] [All Adults]

+ New Term of Agreement

> This feature will allow the admin to add any terms the applicant must accept in order to apply. Some examples may include: requiring authorization to run a criminal or credit background check, agreeing to legal terms, or even agreeing the application information is truthful and honest.
>
> *These questions must be answered in order for an applicant to save the application.*

Application Workflow

- ### Denial Reasons

Customized application denial reasons can be configured through the My.HousingManager.com admin site. These deny reasons will allow the users to deny applications based on their Housing Authority guidelines.

To add a custom denial reason, *select* the "New Denial Reason" icon. Enter a two-letter code, and then a description of the denial reason. As always, be sure and save any changes.

- ### Creating Custom Checklists

A Custom Checklist in HousingManager.com will allow the users to track their completed applications online. This process will require the site administrator to set up their checklist items prior to using the feature. Users will be able to manage their internal workflow by requiring these important application items to be verified by staff.

To add Custom Checklist items *select* the "New Checklist Item" option.

The checklist items created can be marked to be required in order to process TPI Screening as well as required to be completed prior to Lindsey Exporting. Leave these items unselected if not required.

How to Update Checklist Items for Applicants

Once the checklists are created in the settings of HousingManager.com, users can then track the status of the checklists for each applicant from the Properties Menu.

Select a waiting list to view the list of applicants. The checklist status for each applicant will display on the right side of the menu.

To update a checklist item for an applicant, *select* the applicant name. This will open the full application menu.

Mark off each item on the checklist as needed. Users will see on the waiting list those applicants that have pending items on their checklist.

How to View Online History of an Applicant

Viewing an applicant's online history can assist users on when specific items were updated and/or changed on a tenant's application. The applicant history will be available on the My.HousingManager.com admin side only.

To view an applicant's history, navigate to the My.HousingManager.com home page. (User must be logged in).
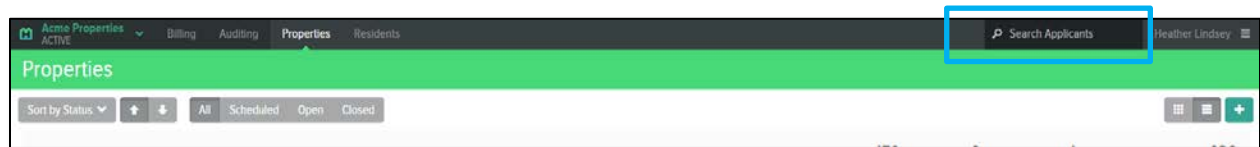
Select a waiting list to view applicants. Or, use the global search feature to key in the applicant's name.

Select the "History" option next to the applicant's name.
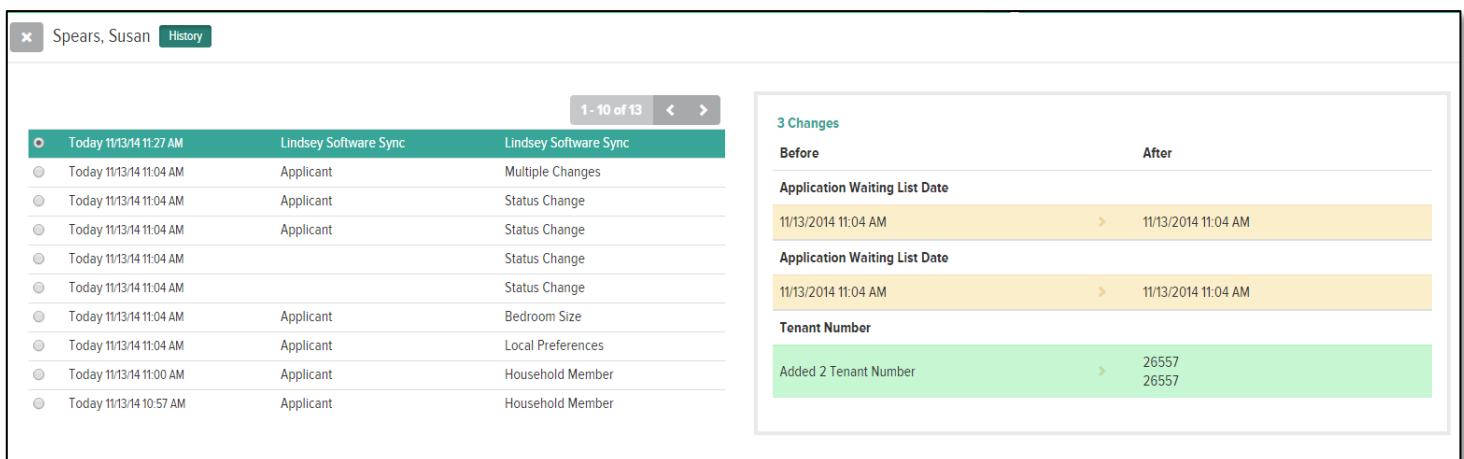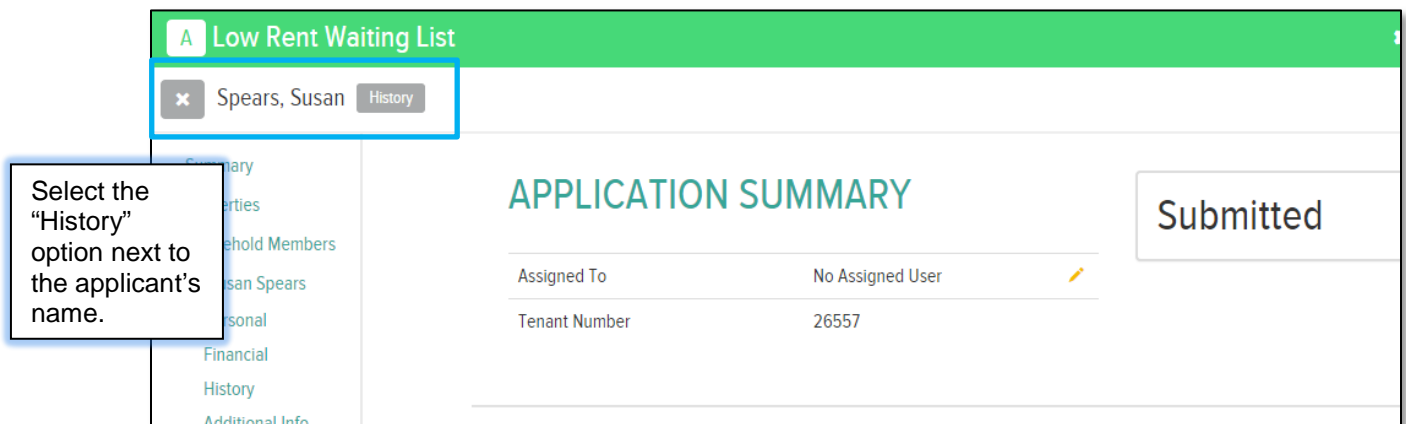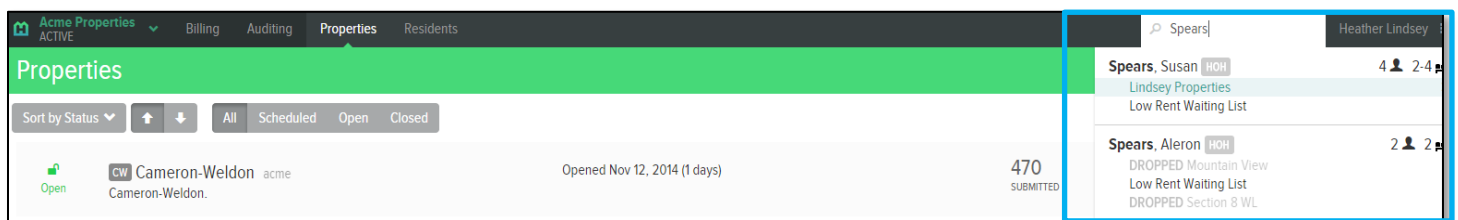
Configuring the Auto-Renewal of Applications Feature

When using the online applications, the user has the option to set up the Auto-Renewal of applications feature from My.HousingManager.com. This feature will reduce the time and effort for users to have to update applications manually. Once the Auto-Renewal feature is activated, it will send an email to applicants on how to update their application.

NOTE: Applicants MUST enter an email address in order to participate in the Auto-Renewal feature.

To set up the Auto-Renewal, navigate to the Settings option from My.HousingManager.com.
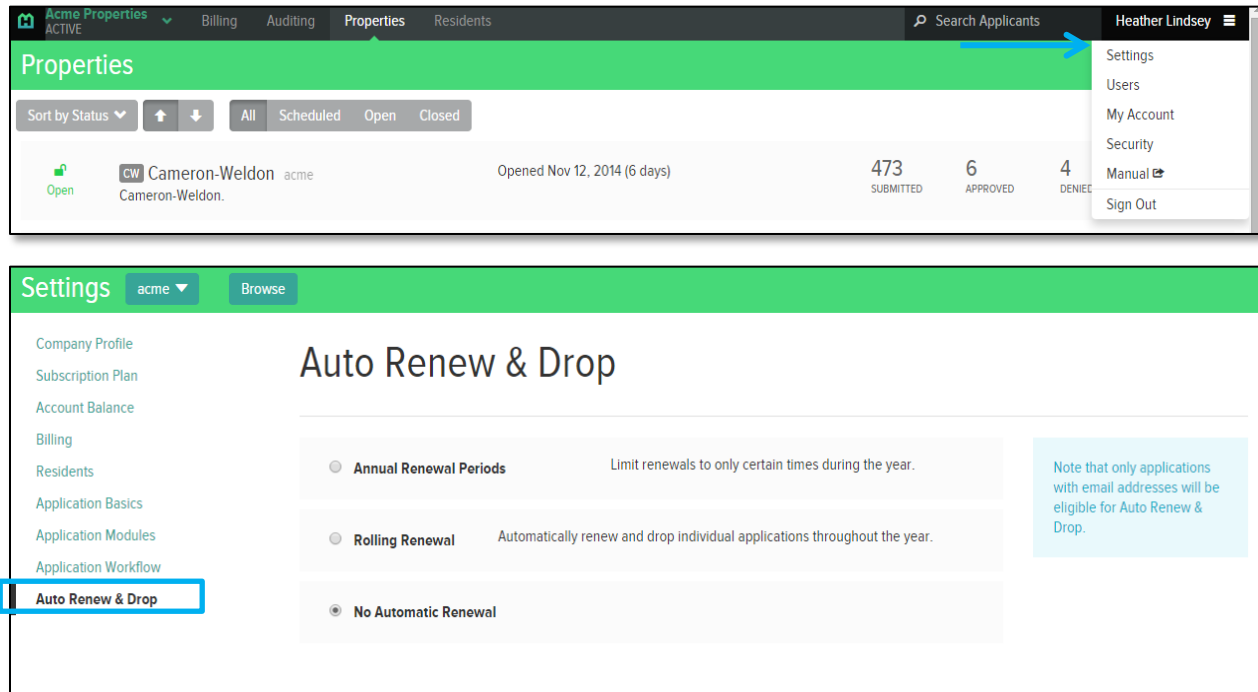
Options:

1.   **Annual Renewal Periods** – if using this option for Renewals, the user will be able to enter a start and end Renewal Period. This will begin the following year.

Enter a Start and End Month and Day. (It will default to the following year).

Enter a "warn" period. This will automatically email those applicants and let them know their application is about to be dropped due to no updates. Use the purge period to automatically purge applications after no response from the renewal feature.

2. **Rolling Renewal -** Administrators can configure rolling renewals, which forces applicants to renew every X days after submission. Using this feature, if an applicant fails to renew within the days allocated their application will be purged. This feature will send a renewal reminder notification, a warning when they are within x days of the end of their renewal time frame, as well as a final email letting them know they have been dropped from the waiting lists they were previously applied for. It is important to note that once this seting is enabled the administrator will not be able to "undo" this action for the affected applicants which have been sent an email. Otherwise, the emails sent to the applicants would be invalidated.

Enter a drop after x days in the settings. Next, enter a Notify day period and warning period. This will automatically email the applicants if an email address was entered.

3. **No Automatic Renewal** – Leave the "No Automatic Renewal" option selected if no renewal period is needed.

How to Process a Lottery Waiting List

Lottery Waiting Lists can be managed easily through My.HousingManager.com administrative site; however, there are important steps the user must follow in order to ensure the Lottery Waiting List is handled correctly. For Lottery information please see the *Lottery Guide.*

Part 4 – Downloading Applications into Lindsey Software

Configuration Options

Application Import Options

Once applications are entered via HousingManager.com application site, the Housing Authority is ready to begin downloading the applications to Lindsey Software. To begin, open the Tenant Applicant Processing Module in Lindsey Software.

Navigate to the **Maintenance – Housing Manager Application Import Options**.
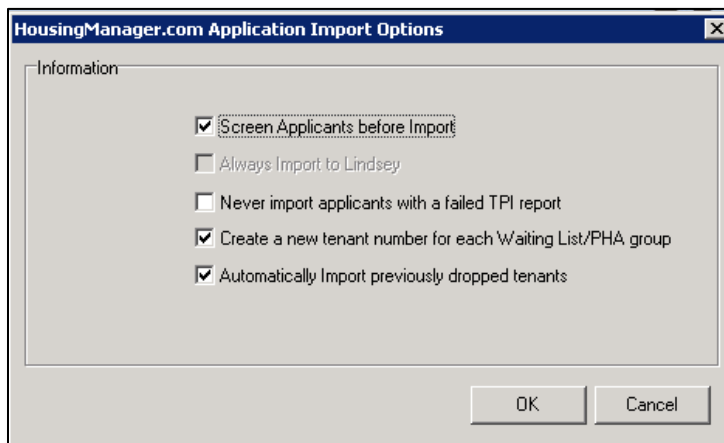
If the "Screen Applicants before Import" option is selected, online applications will be downloaded into Lindsey Software for "holding". The applications will <u>not</u> have a Lindsey tenant number and will not be placed on a waiting list until the "Import" option is run. This option also allows the user to do batch screening for selected applicants PRIOR to importing those applicants into the software.

Other options include:
- <u>Always Import to Lindsey</u> – when this option is selected all online applications from HousingManager.com will be imported directly into Lindsey Software, placed on the applied for waiting list, and will receive a tenant number. This option will not be available if the "Screen Applicants before Import" box is selected.
- <u>Never import applicants with a failed TPI report</u> – If a TPI report is processed within Lindsey, and the user fails the report, this option will prevent the user from importing the applicant into Lindsey Software and placing that applicant on the waiting list.
- <u>Create a new tenant number for each Waiting List/PHA group</u> – Should an applicant apply for more than one waiting list, this option will allow the Housing Authority to establish a brand new tenant number for each waiting list the applicant is on. (This option is NOT recommended).
- <u>Automatically Import previously dropped tenants</u> – If a previous applicant was dropped through Lindsey Software, and re-applies using the online waiting list option, this will allow the tenant to be automatically imported into the software. (Use caution!).

Denying Applications

Prior to denying application, users will need to establish deny reasons within Lindsey Software. To add a deny reason *select* **Maintenance – Application Deny Reasons** from the Tenant Applicant Processing Module.
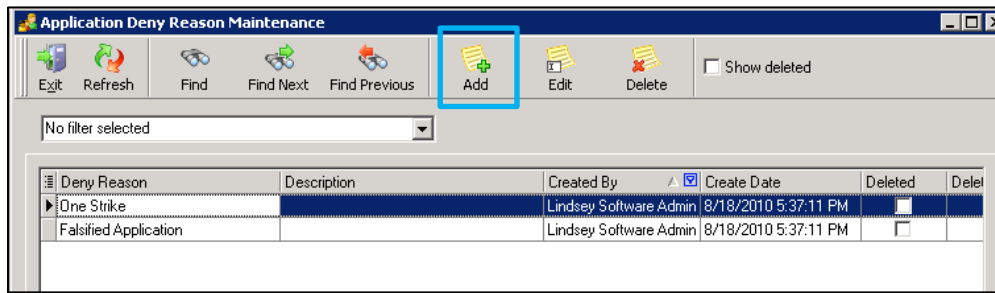
*Select* the "Add" icon to enter a new deny reason.
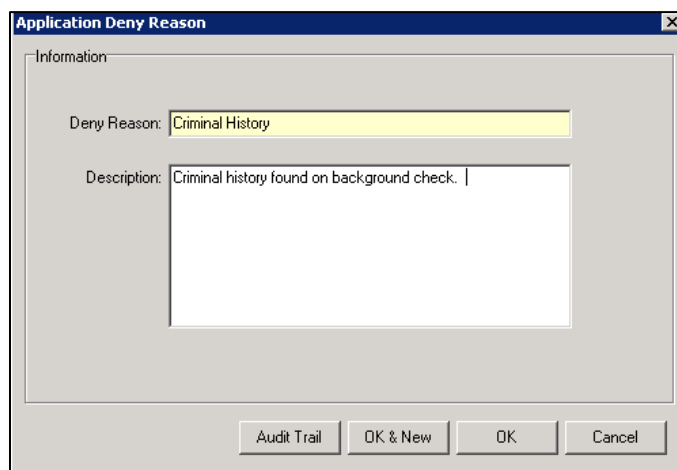
When adding a new deny application reason, enter a brief description about what the deny is for.

*Select* "OK" to save or "OK & New" to save and add more deny reasons.

Download Process

Viewing/Downloading Online Applications through Lindsey Software

Once the user configures the import application options, the online applications are ready to be downloaded into Lindsey Software. To begin the process, *select* the "HM Applicants" icon from the Tenant Applicant Processing Module menu.
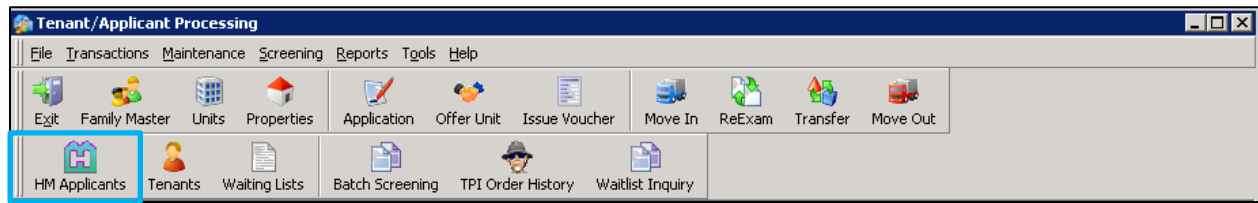
The Online Application Maintenance menu will display. This is the **MAIN TOOL** in managing the HousingManager.com online applications.

Select the "Download" icon from the maintenance menu. This option will sync the applications from the website into Lindsey Software.
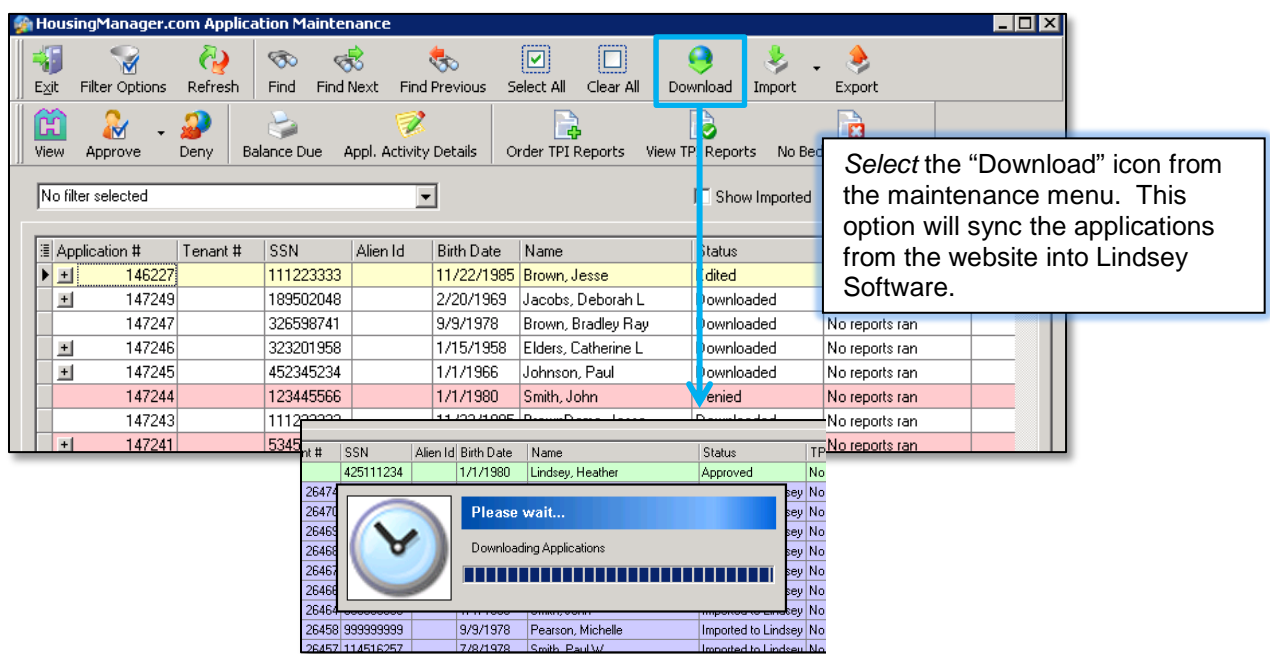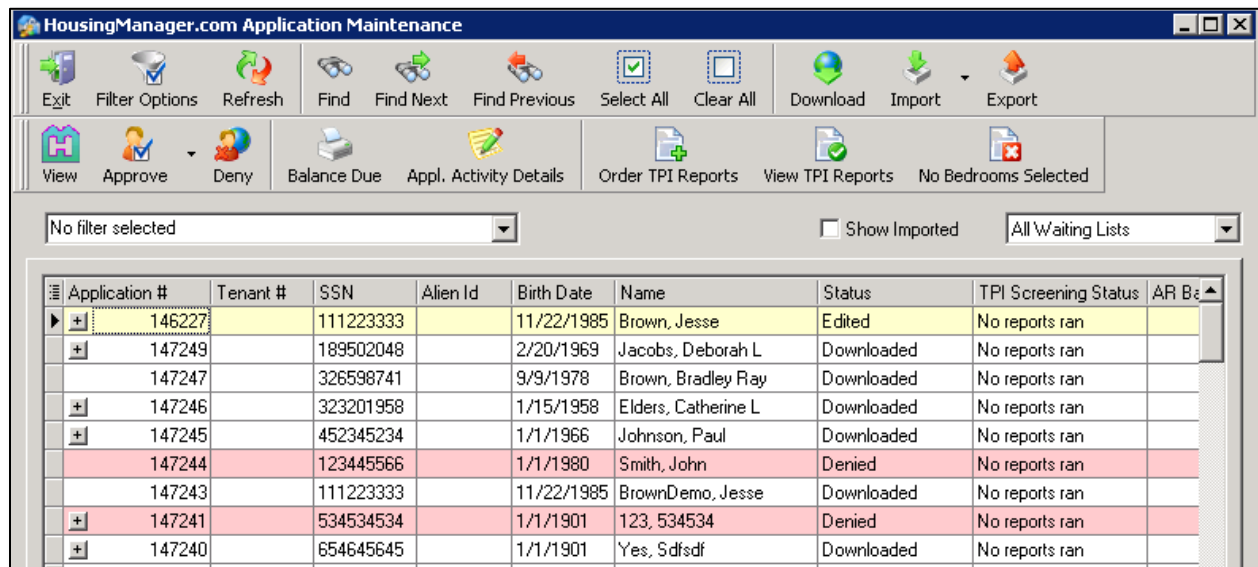
Once the download process is complete, a message will appear letting the user know how many applications were downloaded into the Online Applications Maintenance menu. If no applications are found, the software will also give a message.
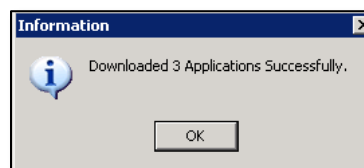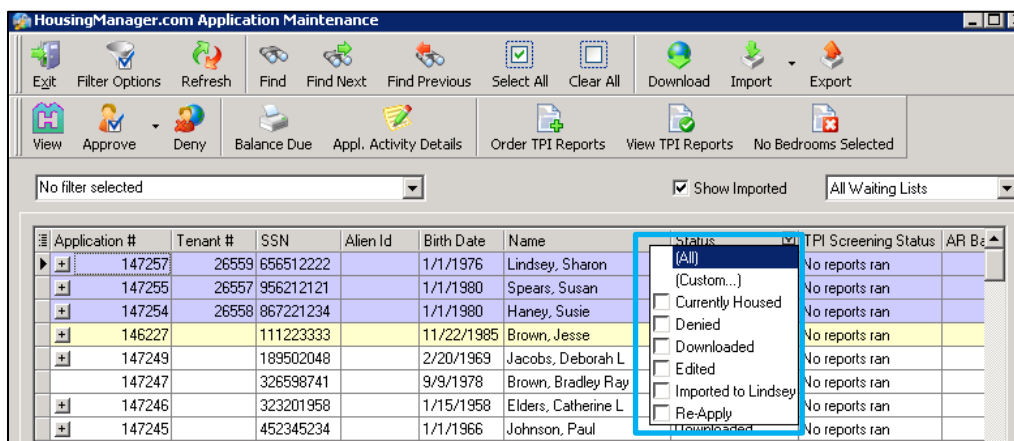
Downloaded Application Status Codes

Once applications are downloaded into the software, there are several status codes the applications can appear with. Below outlines the different status options.

1. Red – Applicant has a balance, they are unfavorable move-out, or are denied.
2. Orange – Applicant is currently housed
3. Pale Yellow – Applications that have been previously downloaded, but have been updated again. (Status shows as "Edited").
4. Green – Approved applicants (status shows as "Approved").
5. Purple – Imported applications into Lindsey Software that have been assigned a tenant number. (Status shows as "Imported to Lindsey")
6. White – These applications are only downloaded from HousingManager.com (Status shows as "Downloaded")
7. Bright Yellow – Previously dropped applicants from Lindsey Software that are now reapplying through HousingManager.com. (Status shows as "Re-apply").

Use the "Status" column in the Online Application menu to manage the online applicants and to multi select applicants to import into Lindsey Software.

Tip: Be sure and select the "Show Imported" checkbox to view any applications that have already been imported into Lindsey Software. By default, the checkbox is not selected.

Unfavorable Applicant

Depending upon the policies and procedures established by the Housing Authority, if an unfavorable applicant is placed on a waiting list the user MUST highlight the applicant and *select* the "Import" icon from the menu. The software will still require the user to do this manually even if the settings are marked to "Always Import to Lindsey".
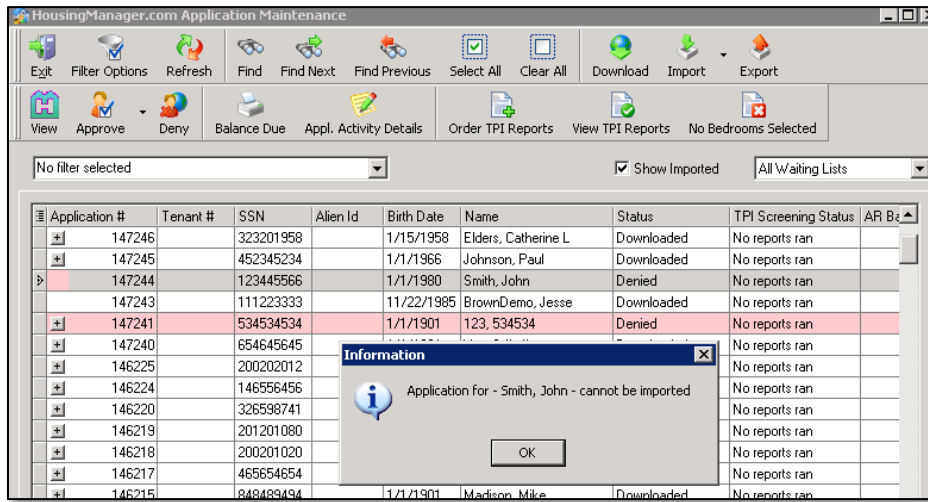
Highlight the tenant and *select* the "Import" option to import and add an unfavorable tenant to the waiting list. Tenants cannot be imported for the following:

1. Denied because of TPI Report
2. Previously moved out owing a balance.

Re-Apply Applicant Status

Once online applications are downloaded into Tenant Processing, some of those applicants may show with a "re-apply" status. This means that those applicants were once entered in Lindsey Software from Application Entry. Re-apply applications will <u>NOT</u> automatically be imported into Lindsey Software once they are downloaded into the software, even with the "Always Import to Lindsey" option selected.
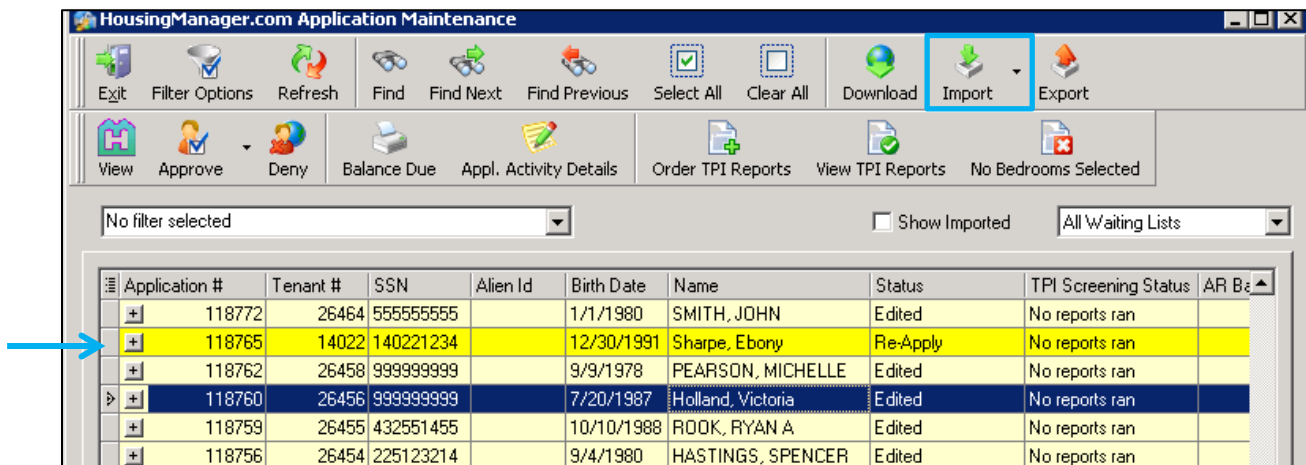
The user must highlight the applicant and *select* "Import" to add the applicant to Lindsey Software. If there are more than one re-applies, the users can multi-select the applicants.

Select "Yes" to import the highlighted application(s).
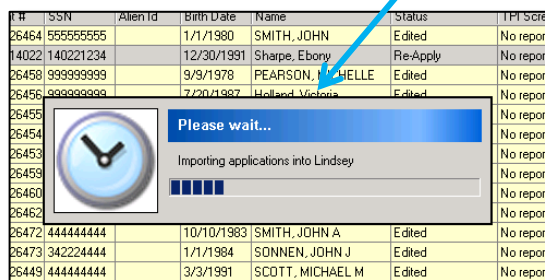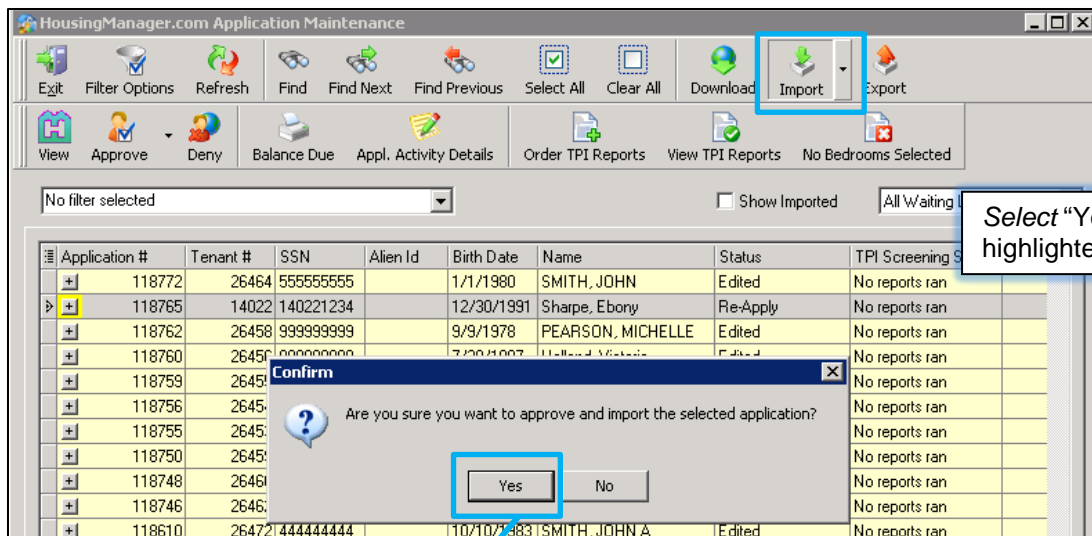
Once the application is through importing, the applicant's status will now be flagged as "Imported".

Users will need to select the "Show Imported" box to view tenants with the imported status.
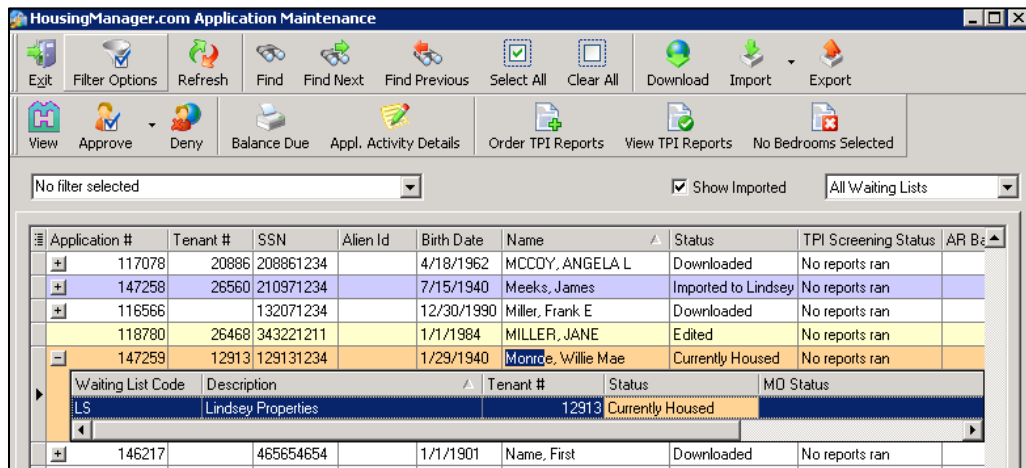
Active Tenants and Applications

There may be circumstances where an active tenant has applied for a different open waiting list via HousingManager.com.

1. Once the application is downloaded, the tenant status will show as the normal "downloaded" – if the option is to not automatically import. To import, highlight the applicant and select the import option. The only information updated for active tenants will be the newly added wait lists.

   If the option to create a new Tenant ID number for each PHA / Project is selected, then once the active application is imported it will create a new tenant number and will import family information as well.

2. The second option that can occur is if the "create a new tenant number for each waiting list / PHA group" is turned OFF. This means that once an active applicant applies online their application will automatically be imported into the software. This is where the "Currently Housed" status will appear. *NO FAMILY MEMBER INFORMATION WILL BE CHANGED DUE TO AFFECTING 50058 AND 50059 INFORMATION.*

Dropping Applicants in Lindsey Software

Once an applicant is imported, the user will need to Drop the application to remove it from a waiting list.

To Drop an application, *select* **Transactions – Waiting List Transactions – Drop from Waiting List(s)** in the Tenant and Applicant Processing Module.

Once the applicant is dropped in Lindsey Software they will no longer display on a waiting list and will have to re-apply for housing.

Once they are dropped from within Lindsey Software, the applicant's status will auto-sync back to HousingManager.com.

(Please allow time for processing in order for it to update on the website.)

Exporting Applications

The Export option allows the user to export all applicants currently on a waiting list in Lindsey Software to HousingManager.com so that applicants can update their information online. This process will also allow the user to drop applications that have not been updated in a pre-determined amount of days, helping the Housing Authority purge applications with no updates.

To export all applications that were entered in Lindsey Software to the HousingManager.com website, *select* the "Export" icon in the HousingManager.com Application Maintenance menu. This is typically processed with the initial export. Any changes in Lindsey Software will auto-sync behind the scenes up to HousingManager.com. However, this process can be run at any given time to ensure all data online is updated.
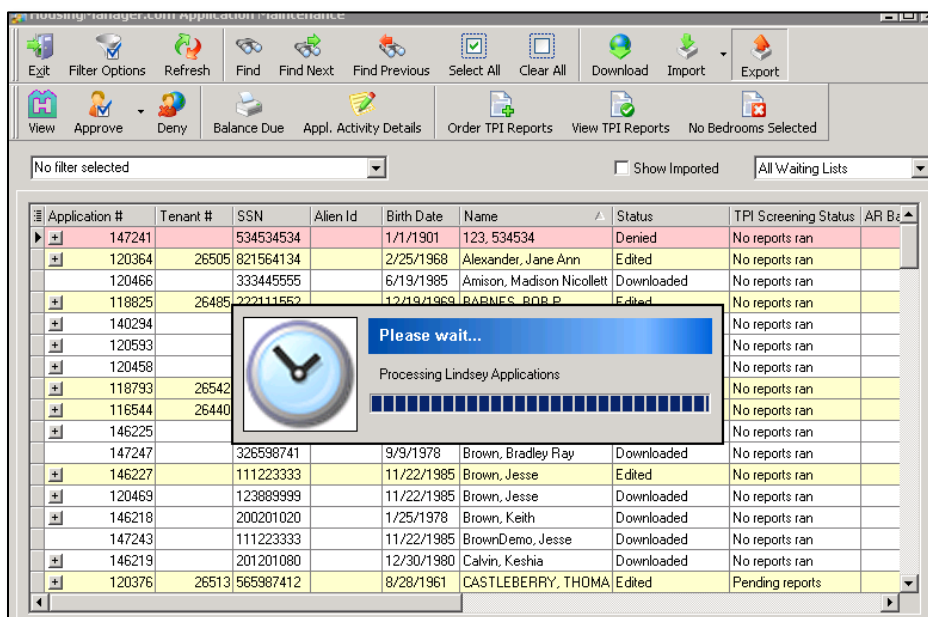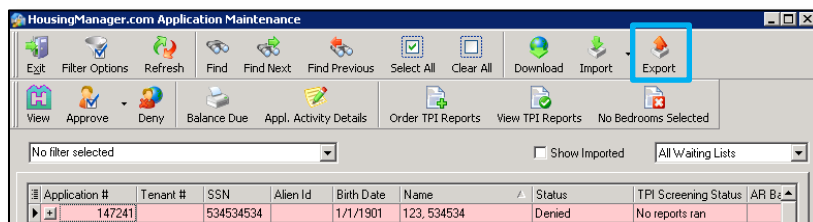

When the Export is completed, the user will see a report that will list each waiting list, the applicant exported, as well as the application date and time.

How to Create New Users in HousingManager.com

Setting up new users / accounts on My.HousingManager.com is simple. The administrative users, or a user with access, must be logged in to create new accounts. Once logged into My.HousingManager.com select the account name, and then the "Users" option from the drop down menu.
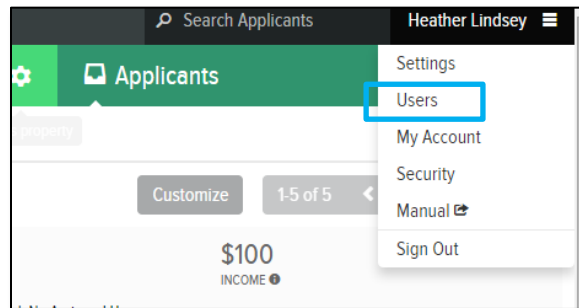
Next, select the "New User" option at the top of the webpage.
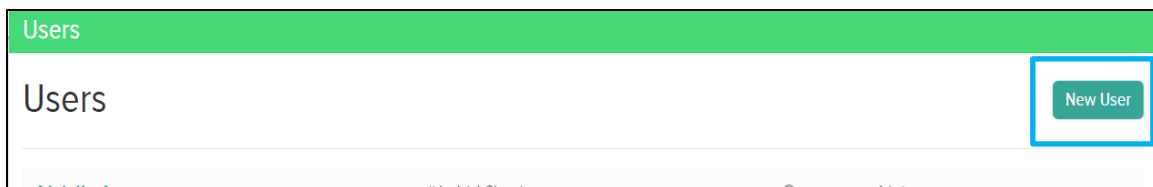
Step 1

Enter the users email account. The email address will be used as the "Username". Enter the name of the account holder for identity purposes.

For Permissions – select the option that will best fit the users duties within My.HousingManager.com. Multiple users can be set up as an Administrator.

Step 2

For notifications, users can elect to have an email sent to their account anytime an applicant submits OR renews their application. This box must be checked.

Step 3

If using Tenant PI Report products via My.HousingManager.com, users must be set up with the appropriate report access. Under the "Assigned TPI Products" section, check off any reports the user will need to process for online applications.

Step 4

Once the user account information is saved, the user will need to log in from their email account to set up a password. The user can also have an admin user add their security information under the Users section.

My.HousingManager.com Security

To add to the security for My.HousingManager.com, clients can configure their local IP addresses so that the web browser will "trust" the local sites.

If attempting to log in from an unknown IP address, users will be required to log in with a verification code sent to their email address.