



HOUSINGMANAGER.COM



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Table of Contents

Part 1 – Manage the Waiting List	3
Initial Setup	3
Verify Waitlist Settings in Lindsey	3
Initial Sync	4
Opening the Waiting List in HousingManager.com	5
Waiting List Properties Setup	6
Preferences	8
Opening the Waiting List	9
How to Make Changes to a Lindsey Software Waiting List	10
Closing an Online Waiting List	10
Part 2 – Online Applications (Application Entry)	11
How to Enter a New Application	11
2-Step Verification	21
How Can an Applicant Edit Their Application?	22
Part 3 – HousingManager.Com Administrative Settings	24
Logging In	24
Navigating the Main Admin Page	24
HousingManager.com Settings	25
Company Profile	25
Basic Settings	25
Application Fee Settings (Optional)	25
Support Contact	26
Branding	26
Application – Basics	27
Application Modules	28
Application Workflow	31
Denial Reasons	31
Creating Custom Checklists	31
How to Update Checklist Items for Applicants	32
How to View Online History of an Applicant	33
Configuring the Auto-Renewal of Applications Feature	34
How to Process a Lottery Waiting List	36
Part 4 – Downloading Applications into Lindsey Software	37
Configuration Options	37
Application Import Options	37
Denying Applications	38
Download Process	39
Viewing/Downloading Online Applications through Lindsey Software	39
Downloaded Application Status Codes	40
Unfavorable Applicant	41
Re-Apply Applicant Status	41
Active Tenants and Applications	43
Dropping Applicants in Lindsey Software	44
Exporting Applications	45
How to Create New Users in HousingManager.com	46
My.HousingManager.com Security	48

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.

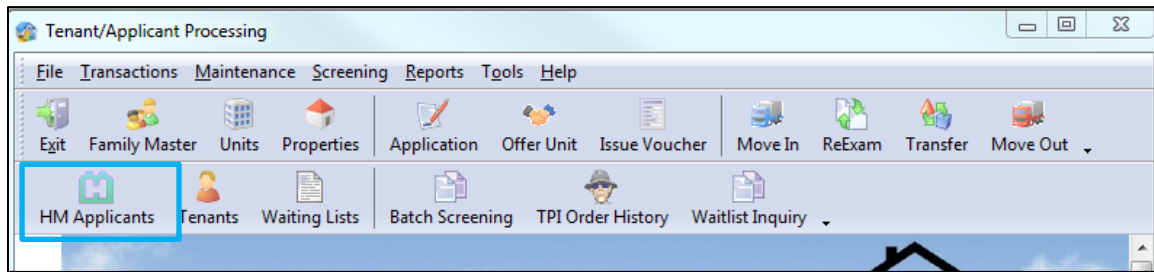
Code	Description	Points
KV	Katrina Victims	4
GN	GC Non/Work Fam/Single	2
GW	Extra 123	3
NG	Extra	1

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

Initial Sync

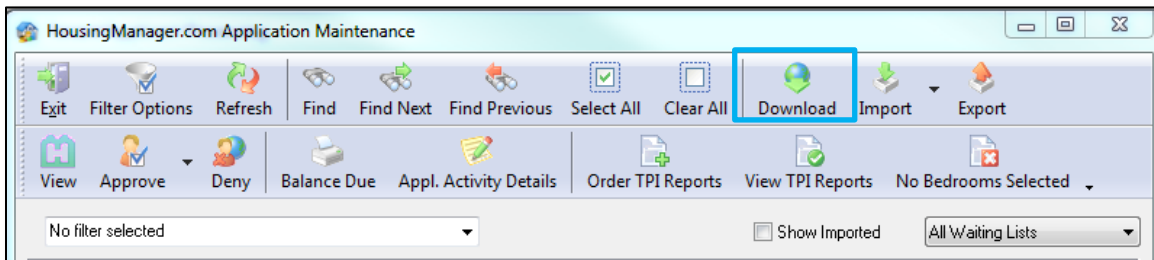
To initiate the initial push of the Waiting List(s) from Lindsey Software to HousingManager.com, access the Tenant Applicant Processing Module (TAP) from the Lindsey Software toolbar. *Select* the HM Applicants icon from the main menu.

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.

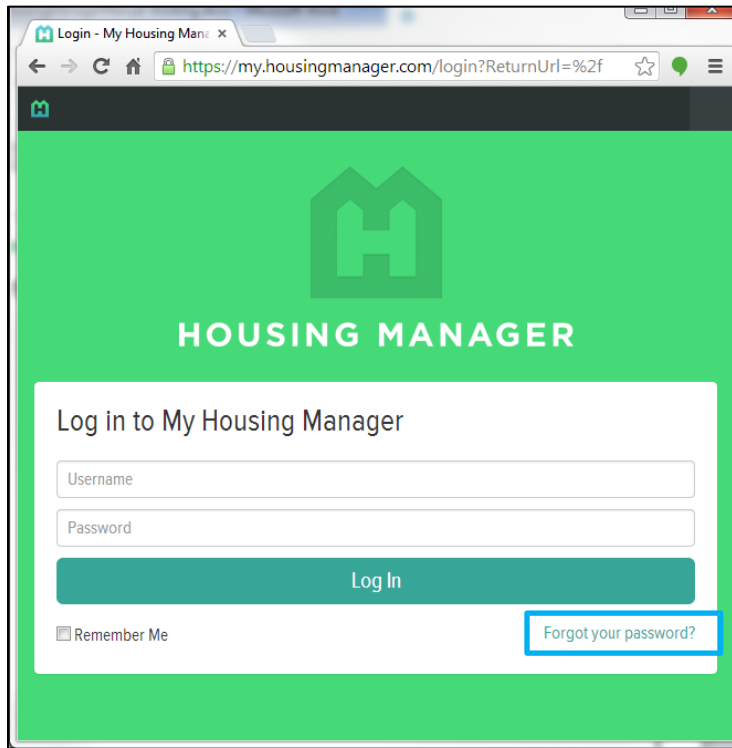
Step 2



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](https://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”.



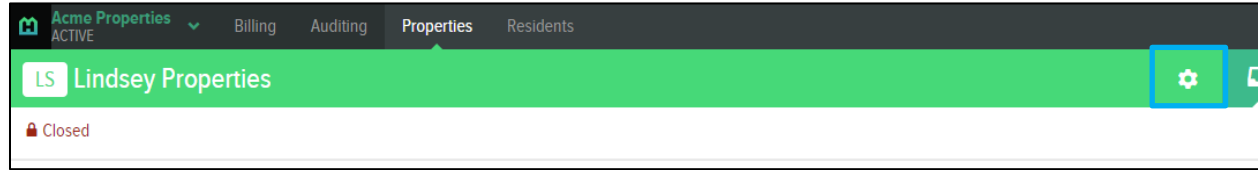
Status	Properties	SUBMITTED	APPROVED	DENIED	TOTAL
Scheduled	Dallas High School-PB Disaster Relief.	1	0	0	1
Scheduled	FSS Waiting List FSS Waiting List.	0	0	0	0
Scheduled	LINWOOD DHAP.	0	0	0	0

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

A screenshot of the 'Property Setup' form. The form is titled 'Property Setup' and has a sidebar with 'Property Setup' and 'Waiting List Setup'. The main form area contains fields for 'Code' (LS), 'Name' (Lindsey Properties), 'Description' (Lindsey Properties), and 'Physical Address' (Address, Zip, City, State). A blue box highlights the 'Physical Address' section. A blue arrow points from the text box on the left to the 'Physical Address' section.

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.

A screenshot of the 'Waiting List Setup' form. The form is titled 'Waiting List Setup' and has a sidebar with 'The Basics'. The main form area contains a 'Minimum Age' field (18) and an 'Override if disabled' checkbox. A blue box highlights the 'Minimum Age' field and the 'Override if disabled' checkbox. A blue arrow points from the text box on the right to the 'Minimum Age' field.

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 years of age or younger should share room.

☐ Same gender children 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
<input checked="" type="checkbox"/> 0 Bedrooms	<input type="text" value="1"/>	<input type="text" value="1"/>
<input checked="" type="checkbox"/> 1 Bedroom	<input type="text" value="1"/>	<input type="text" value="2"/>
<input checked="" type="checkbox"/> 2 Bedrooms	<input type="text" value="2"/>	<input type="text" value="4"/>
<input checked="" type="checkbox"/> 3 Bedrooms	<input type="text" value="3"/>	<input type="text" value="6"/>
<input checked="" type="checkbox"/> 4 Bedrooms	<input type="text" value="4"/>	<input type="text" value="8"/>
<input checked="" type="checkbox"/> 5 Bedrooms	<input type="text" value="5"/>	<input type="text" value="10"/>
<input type="checkbox"/> 6 Bedrooms	<input type="text" value="6"/>	<input type="text" value="12"/>
<input type="checkbox"/> 7 Bedrooms	<input type="text" value="7"/>	<input type="text" value="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.

Preferences

All your preferences and some options will sync from Lindsey Software.

☒ When calculating score, only use the highest preference.
☐ Disallow applicant answer change

Question Type	Automatic	Custom	Question	Points
<input checked="" type="checkbox"/>	GN	GC Non-work	Are you unemployed?	2
<input checked="" type="checkbox"/>	GW	GC Work/E/D/Singles	If Head, Co-Head or Spouse has a job and rece	3
<input checked="" type="checkbox"/>	KV	Katrina Victims	If Head, Co-Head or Spouse has a job and rece	4
<input checked="" type="checkbox"/>	NG	All Non GC Residents	If Head, Co-Head or Spouse has a job and rece	1

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.

Warning: This preference is not enabled and will not be shown to applicants.

☒ **Question Type** Automatic Custom

☒ GW GC Work/E/D/Singles If Head, Co-Head or Spouse is disabled. 3

Custom Questions:

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

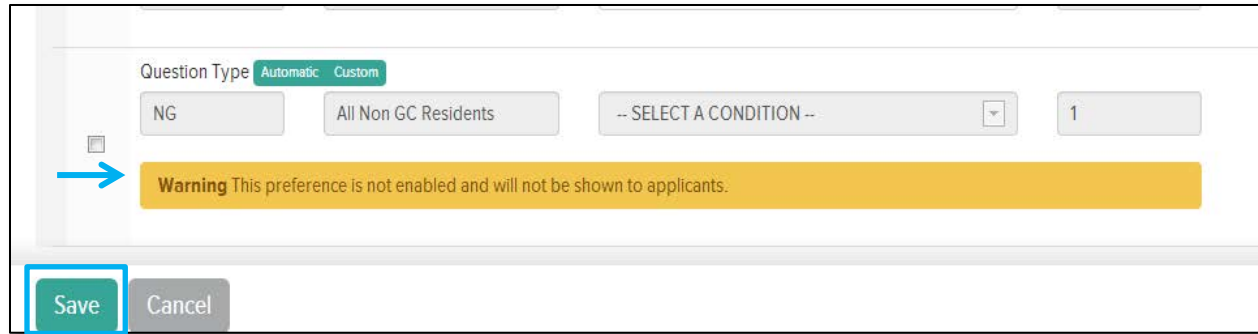
☒ **Question Type** Automatic Custom

☒ KV Katrina Victims Are you a katrina victim? 4

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!



The screenshot shows a web interface for configuring application questions. At the top, there are tabs for 'Question Type' with 'Automatic' and 'Custom' options. Below this, there are input fields for 'NG' (containing 'All Non GC Residents'), a dropdown menu labeled '-- SELECT A CONDITION --', and a numeric field containing '1'. A yellow warning banner is displayed in the center, stating: 'Warning This preference is not enabled and will not be shown to applicants.' At the bottom left, there are 'Save' and 'Cancel' buttons. A blue arrow points to the warning banner, and a red box highlights the 'Save' button.

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



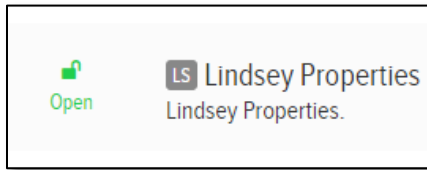
Settings are currently locked.

You can not edit an application form while it is accepting applications.

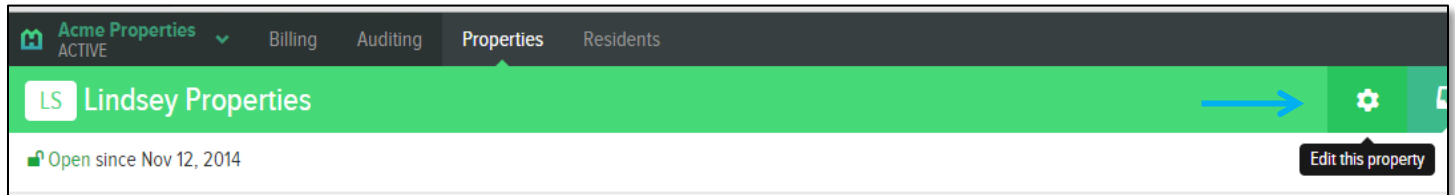
How to Make Changes to a Lindsey Software Waiting List

Closing an Online Waiting List

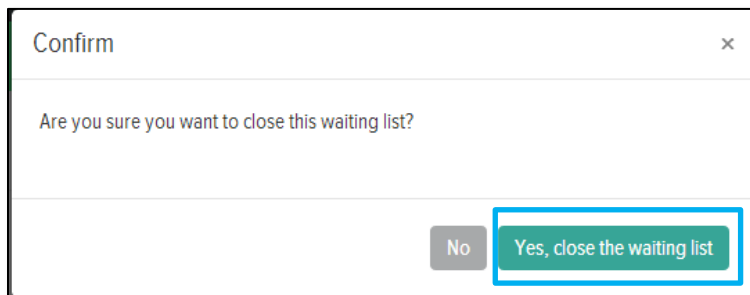
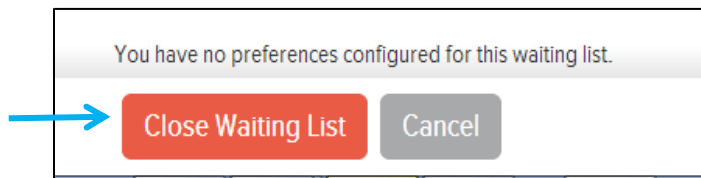
Prior to adding, editing, or removing preferences on a waiting list, the user MUST close the waiting list on HousingManager.com.



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.



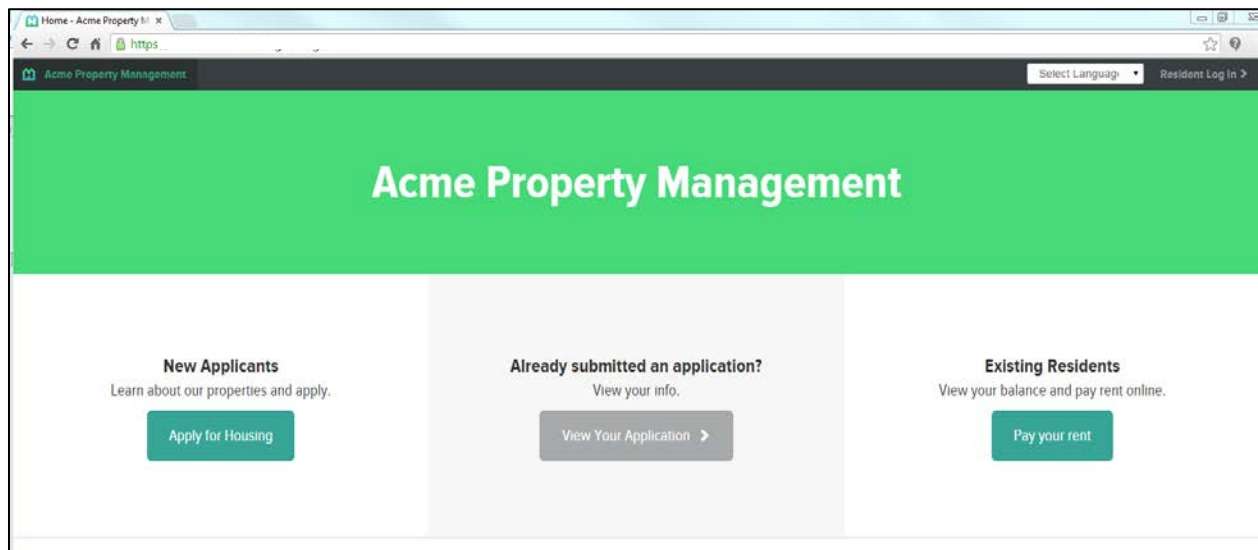
The user will need to confirm the waiting list is closed by *selecting* “Yes, close the waiting list”.

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.*

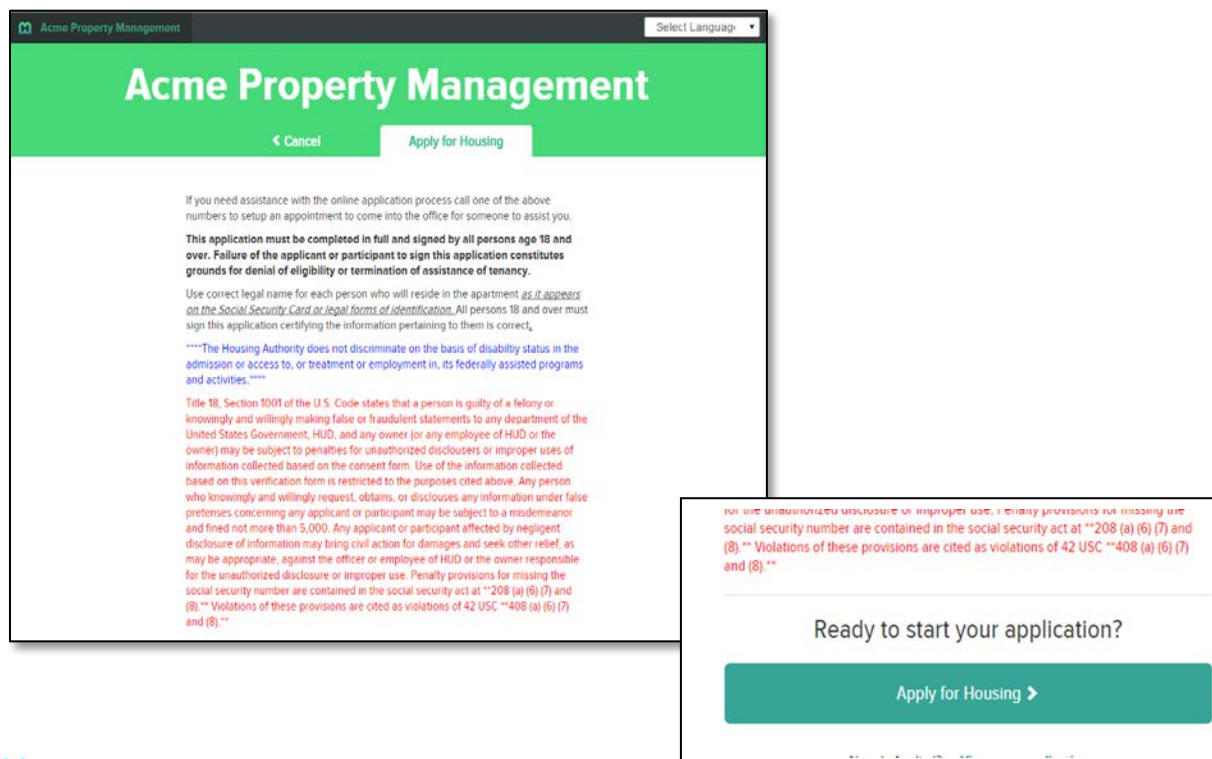
Below is what the applicant will see when first logging on to the Housing Authority's HousingManager.com webpage.



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.”



Let's start with a little identifying information.

SSN: 867-22-1234
 Date of Birth: 01/01/1980
 Last Name: Haney

Don't have an SSN?

Get Started

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.

Acme Property Management

Rental Application

My Application

0% Complete

Properties

Household Members

Head of Household

Misc Info

Confirm

Properties

Which properties would you like to apply for?

Filter Choices

Age Restriction

<input checked="" type="checkbox"/>	Demo Acres 0-4 bedrooms	Accepting Applications
	Acres of the Demo variety	
<input type="checkbox"/>	Cameron-Weldon 1-3 bedrooms 45+ Only	Accepting Applications
	Cameron-Weldon	
<input type="checkbox"/>	Dallas High School-PB 1-4 bedrooms 45+ Only	Accepting Applications
	Disaster Relief	
<input checked="" type="checkbox"/>	Lindsey Properties	Accepting Applications
	Lindsey Properties	

Before you move on, let's make sure you qualify for all of these properties.

To submit your application, you will have to meet these requirements:

The household must be between 1 and 6 members, not including a spouse.

Continue

Next Step: Terms of Agreement

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.

My Application

14% Complete

✓ Properties

Household Members

Head of Household

Misc Info

Confirm

Head Of Household

Personal Information

First Name

Susie

Middle Name

Last Name

Haney

SSN

867-22-1234

Date of Birth

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 #

123

Street Name

Super St.

Unit #

City

Searcy

State

Arkansas

Zip

72143

County

--County--

Mailing Address

☒ Same as Physical Address

Contact Information

Phone 1

Home

(501) 111-1234

Phone 2

--Type--

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

E-mail Address

applicant@lindseysoftware.com

Confirm E-mail Address

applicant@lindseysoftware.com

Continue >

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

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.

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.

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

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.

- 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
<input type="text" value="Savings"/>	<input type="text" value="\$ 10,000"/>	<input type="text" value="\$ 10"/>

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
<input type="text" value="2006"/>	<input type="text" value="Ford"/>	<input type="text" value="Focus"/>	<input type="text" value="123456R"/>

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.**

History for Susie Haney

Criminal History

List any misdemeanor or felony charges for Susie Haney. (not including traffic tickets)

☒ Add a Criminal Charge or ☐ No Criminal Charges

Federal Housing History

List any federal housing programs Susie Haney has lived in.

☒ Add a Federal Housing Program

Previous Addresses

List all address where Susie Haney has lived for the past 5 years. (United States address)

☒ Add an Address

Continue >

Next Step:
We have additional information for Susie Haney

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 continue to the next section of the application, the applicant must agree to the terms.

Rental Application

My Application

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

62% Complete

- ✓ Properties
- ✓ Household Members
- ✓ Susie Haney

Additional Info for Susie

You must agree to these terms to proceed

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

☒ I agree. ☐ I disagree.

Do you agree that at anytime you are found to have not been truthful during Certification Time, your application will be none and VOID?

☒ I agree. ☐ I disagree.

Step 6 – Adding Additional 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: Middle Name: Last Name:

SSN:

Date of Birth: Relation to Head of Household:

Gender: Student Status:

☐ 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

--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.

List any alternate names used in the last 10 years.

[+ Add an Alias](#)

Race and Ethnicity

☒ White

☐ American Indian or Alaskan

☐ Black

☐ Asian

☐ Hawaiian/Pacific Islander

☐ Other

Ethnicity

Not Hispanic or Latino

Physical Address

☒ Addresses are the same as the Head of Household

Contact Information

Phone 1

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

Phone 2

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

[Continue >](#)

Next Step:
Tell us about this household member's Finances

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.

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.](#)

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.*

Rental Application

My Application

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

68% Complete

Emergency Contact

☐ I have an emergency contact. or ☒ I do not have an emergency contact.

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.

The screenshot shows the 'Rental Application' interface. On the left, under 'My Application', it says 'Started Wednesday, November 12, 2014 2:27:17 PM' and '81% Complete' with a progress bar. A sidebar lists: Properties, Household Members, Susie Haney, Emergency Contact, Misc Info (selected), and Confirm. The main area is titled 'Misc Info' and 'Bedroom Preferences'. It asks to 'Select the number of bedrooms you would prefer. You can select more than one choice if you are flexible.' with radio buttons for 0, 1 (selected), 2, 3, and 4. Below is 'Accessibility Options' with a checkbox for 'WheelChair'. At the bottom, there is a 'Continue >' button and a 'Next Step: Confirm your answers and submit your application' instruction. A 'Save and Finish Later' link is also present.

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.

This close-up shows the 'Bedroom Preferences' section. A black error message box states: 'Your household size makes this choice unavailable.' The message points to the '1' bedroom option, which is currently selected with a radio button. Other options for 0, 2, and 3 bedrooms are visible but not selected.

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.

The screenshot shows the 'Review and Confirm Your Application' page in the Acme Property Management system. The page has a green header with 'Rental Application' and a user profile 'Susie Haney'. On the left, a sidebar titled 'My Application' shows a progress bar at 93% Complete and a list of sections: Properties, Household Members, Susie Haney, Emergency Contact, Misc Info, and Confirm. The main content area is titled 'Review and Confirm Your Application' and features a blue banner with an information icon and the text 'You're almost done! Your application is ready to submit. Review your information below and make any needed corrections. Once your application is submitted, you will be able to return here to see its status or make needed changes.' Below the banner, there are three main sections: 'PROPERTIES' with a list of 'Demo Acres' and 'Lindsey Properties'; 'HOUSEHOLD MEMBERS' with 'Susie Haney' listed as 'Head of Household'; and 'SUSIE HANEY HEAD OF HOUSEHOLD' with a 'Personal Information' section. The 'Personal Information' section includes 'Identity' (Full Name: Susie Haney) and 'Race and Ethnicity' (Race: White).

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** 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

Confirm Email Address

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.

Set Up 2-Step Verification

or

Skip

Why 2-Step Verification?

Your application can be accessed 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.

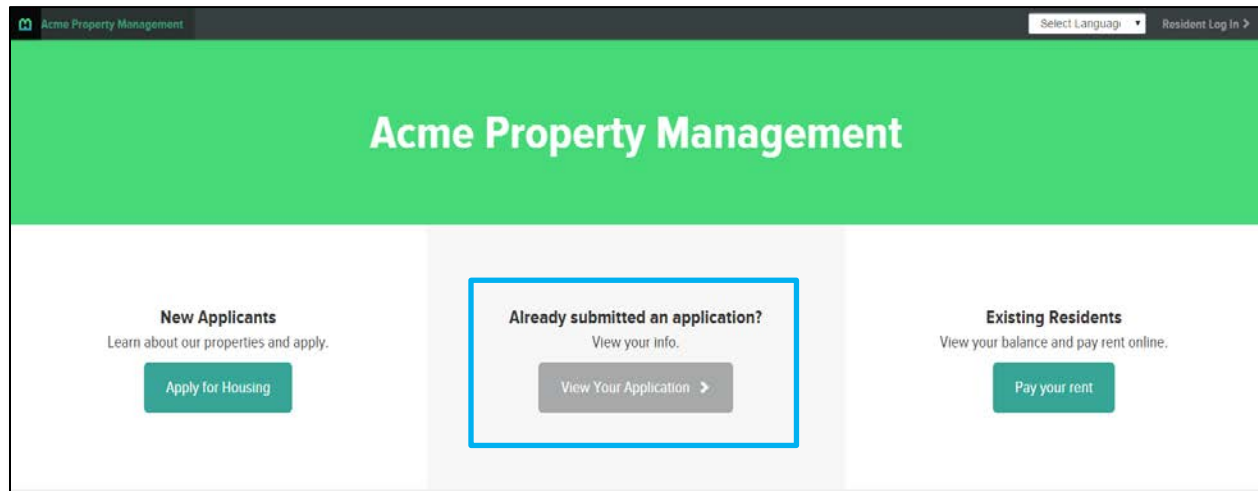
How does it work?

How does it protect me?

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.

Welcome back, Susie.

To keep your application secure, we'll need you to verify your identity. We're going to send you a five (5) digit authentication code, which you will need to enter here before you can access your application.

Send authentication code to my:

☒ Email Address: a....@lindseysoftware.com

☐ Mobile phone number: (501) ###-##91

Standard text messaging rates may apply.

[Send Code](#)

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

Enter your authentication code.

An authentication code has been sent to (501) ###-##91. [Can't find your code?](#)

Authentication Code

Your authentication code is 5 digits.

[View My Application](#)

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

View Your Rental Application

Haney, Susie
SSN: XXX-XX-1234

Application Status
Submitted 11/12/2014 2:27:17 PM

Properties
Name
Acres of the Demo variety
Lindsey Properties

Status
Submitted
Submitted

[View Application](#) [+ Apply Now](#) [Print Application](#) [Sign Out](#)

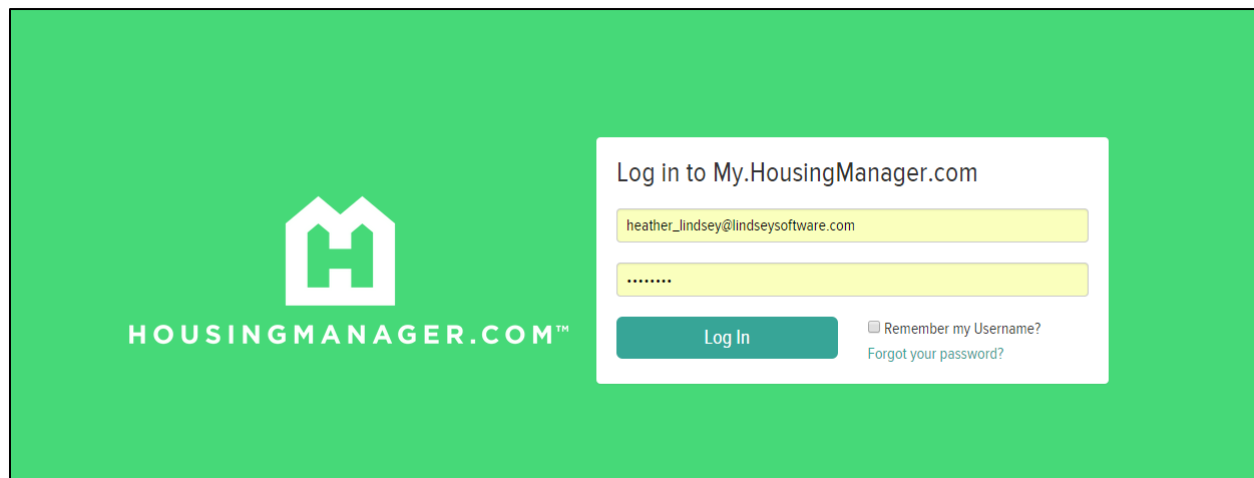
- To edit the existing application, the user can select “View Application.”
- If any new waitlists have been open since the time the tenant applied previously, they will be able to select “Apply Now” to add their application to any new waitlist.

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

Part 3 – HousingManager.Com Administrative Settings

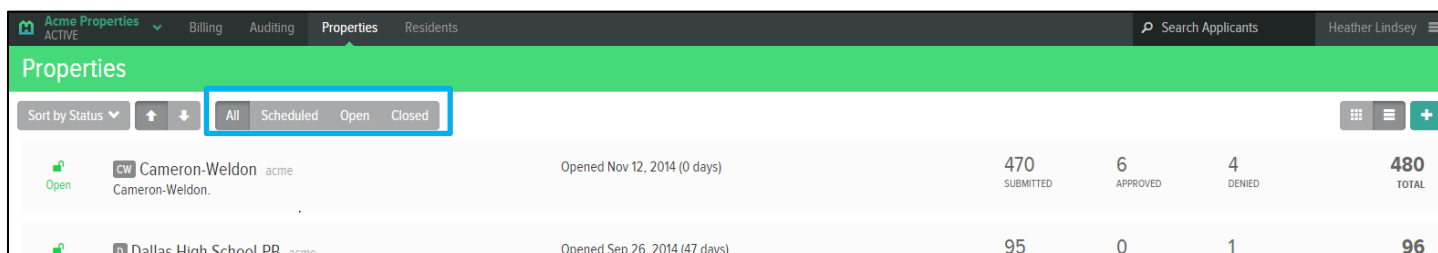
Logging In

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.

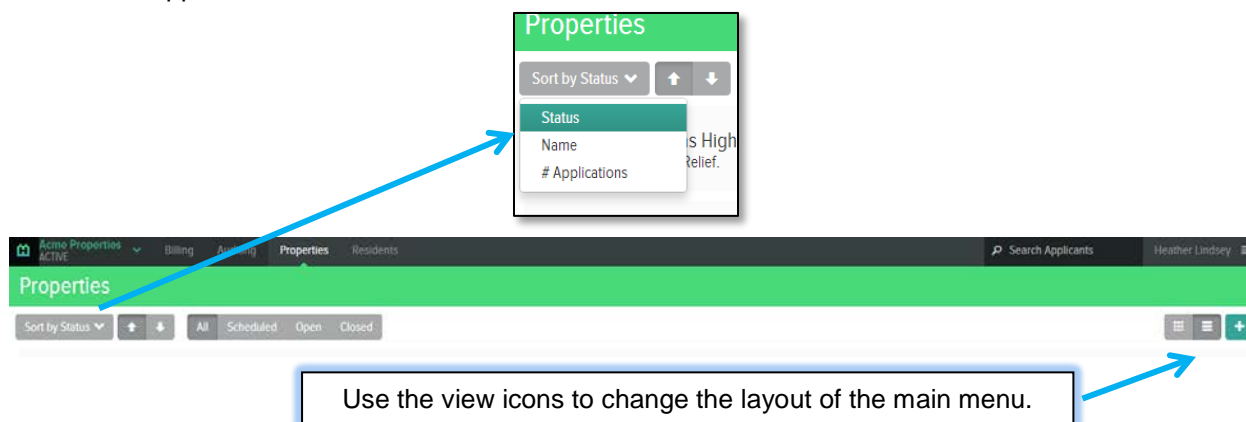


Navigating the Main Admin Page

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.

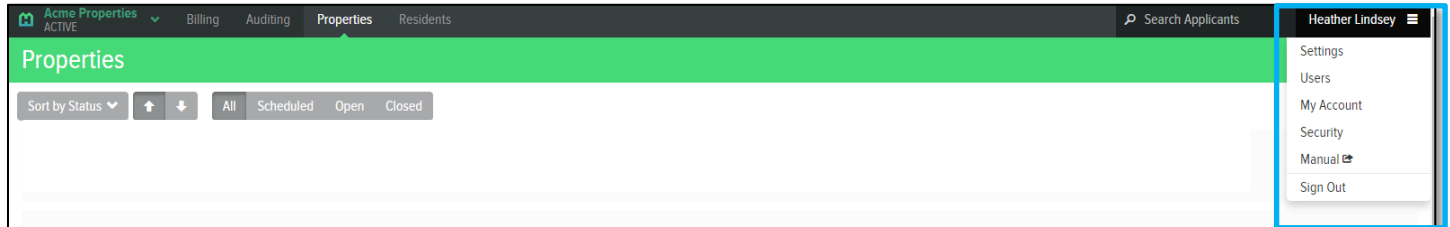


The user can *select* the “Sort by Status” to sort by Status of a Property (Waiting List), Name of the Property (Waiting List), or by the number of applications taken.



HousingManager.com Settings

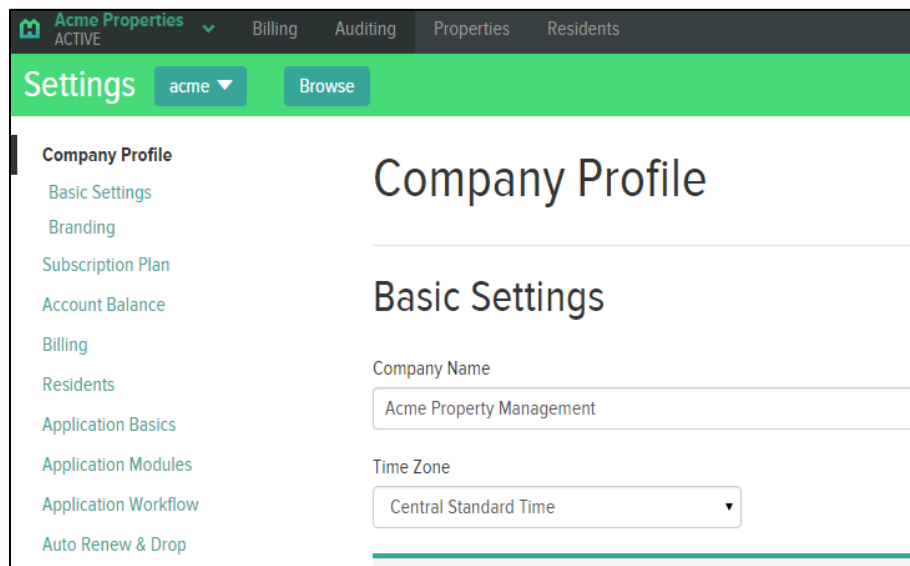
To update information regarding the online application webpage, the administrator will need to *select* the *Settings* option under the Account Name on the top right corner.



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.

A screenshot of the 'Application Fee' settings form. The form has a title 'Application Fee'. Below the title, there is a checkbox labeled 'Enable Application Fee' which is checked. Underneath, there is a label 'Application Fee' and a text input field with a dollar sign icon and the value '10'.

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.

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.

Company Profile

Subscription Plan

Account Balance

Billing

Residents

Application Basics

Applicant Permissions

Application Security

Before the applicant starts...

Application Basics

Application Permissions

Select either checkbox that applies.

☒ Allow applicants to edit application after submission ⓘ

☐ Allow applicants to remove themselves from waiting lists after submission ⓘ

- 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.

Enhanced Application Security

Enhances application security by requiring applicant to input a 5-digit code sent to their mobile phone or email address whenever they attempt to log in.

None Optional Required

- 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.

Before the applicant starts...

Application Landing Page Text

Use correct legal name for each person who will reside in the apartment as it appears on the Social Security Card or legal name or identification. All persons 18 and over must sign this application certifying the information pertaining to them is correct.

****The Housing Authority does not discriminate on the basis of disability status in the admission or access to, or treatment or employment in, its federally assisted programs and activities.****

Title 18, Section 1001 of the U.S. Code states that a person is guilty of a felony or knowingly and willingly making false or fraudulent statements to any department of the United States Government, HUD, and any owner (or any employee of HUD or the owner) may be subject to penalties for unauthorized disclosures or improper uses of information collected based on the consent form. Use of the information collected based on this verification form is restricted to the purposes cited above. Any person who knowingly and willingly request, obtains, or discloses any information under false pretenses concerning any applicant or participant may be subject to a misdemeanor and fined not more than 5,000. Any applicant or participant affected by negligent disclosure of information may bring civil action for damages and seek other relief, as may be appropriate, against the officer or employee of HUD or the owner responsible for the unauthorized disclosure or improper use. Penalty provisions for missing the social security number are contained in the social security act at **208 (a) (6) (7) and (8).** Violations of these provisions are cited as violations of 42 USC **408 (a) (6) (7) and (8).**

This text appears before the applicant begins the application.

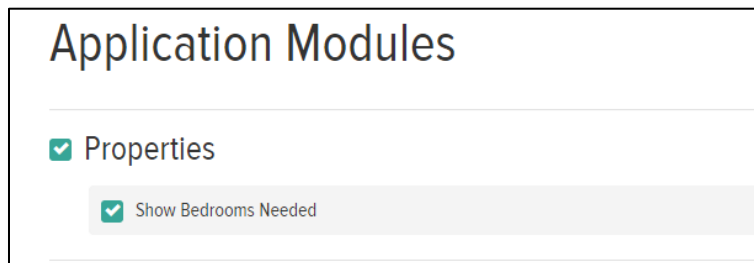
The user can make any changes to the text when/if needed (It works the same way as Microsoft Word). The administrator can also add hyperlinks to other necessary HUD forms through the Landing Page.

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.



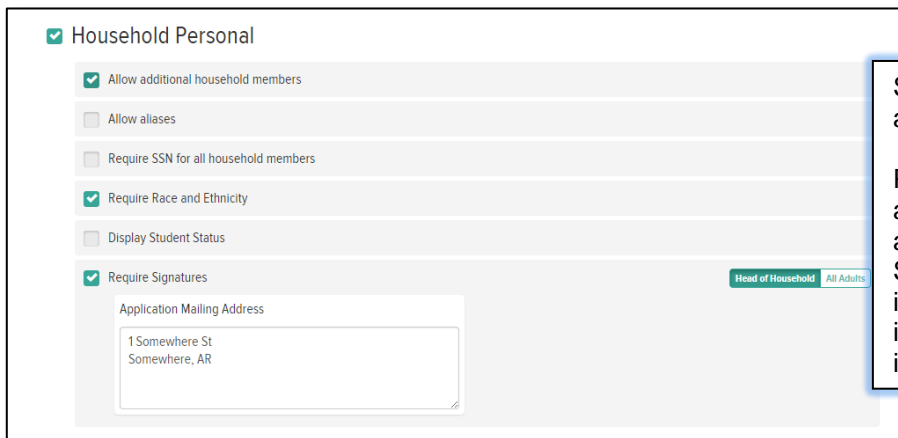
Application Modules

☒ Properties

☒ Show Bedrooms Needed

- Household Personal

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



☒ Household Personal

☒ Allow additional household members

☐ Allow aliases

☐ Require SSN for all household members

☒ Require Race and Ethnicity

☐ Display Student Status

☒ Require Signatures

Application Mailing Address

1 Somewhere St
Somewhere, AR

Head of Household All Adults

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.

- Household Financial

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.

The screenshot shows the 'Household Financial' settings form. It has a main title 'Household Financial' with a checked checkbox. Below it are several sections: 'Income' with a checked checkbox and a 'Collect Address' checkbox; 'Expenses' with a checked checkbox and four sub-items: 'CB' (Child Care - while I'm in school), 'CE' (Child Care - while I'm at work), 'ME' (Medical Expense), and 'TE' (Travel Expense). Each sub-item has a 'Require Creditor' checkbox. At the bottom of the expenses section is a '+ New Custom Expense' link. Below the expenses section are 'Assets' and 'Automobiles', both with checked checkboxes.

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

- Household History

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.*

The screenshot shows the 'Household History' settings form. It has a main title 'Household History' with a checked checkbox. Below it are three sections: 'Criminal History', 'Housing Authority History', and 'Previous Addresses', each with a checked checkbox.

- Emergency Contact

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.

The screenshot shows the 'Emergency Contact' settings form. It has a main title 'Emergency Contact' with a checked checkbox. Below it are two sections: 'Previous Addresses' and 'Misc Info', both with checked checkboxes. At the bottom is a 'Preferences' section with a checked checkbox.

- Misc Info

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

Do you currently own an automobile?

☐ Require Explanation if

[+ 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?

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

[+ 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.

The screenshot shows the 'Denial Reasons' configuration page. It features a list of existing reasons: 'O' with description 'Other' and 'BC' with description 'Bad Credit'. Each entry has a red 'X' icon to its right. A '+ New Denial Reason' link is located below the list. At the bottom are 'Save' and 'Cancel' buttons. A light blue callout box on the right states: 'Create custom denial reasons for any special reasons for application denials.'

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 screenshot shows the 'Checklist' configuration page. It displays a list of items: 'SSN Card' (description: 'Social Security Card for each member'), 'Birth Certificate' (description: 'Birth Certificate copy for Head of Household'), and 'HUD Form' (description: 'Copy of HUD form in file'). Each item has two checkboxes: 'Required for TPI Screening' and 'Required For Lindsey Export'. The 'SSN Card' and 'Birth Certificate' items have the 'Required For Lindsey Export' checkbox checked. A '+ New Checklist Item' link is at the bottom left. A light blue callout box on the right states: 'Manage your internal workflow by requiring important applications items to be verified by staff.' A blue arrow points from the '+ New Checklist Item' link to a detailed view of a checklist item below.

The detailed view shows a form for a new checklist item with fields for 'Name' and 'Description'. Below these fields are two checkboxes: 'Required for TPI Screening' and 'Required For Lindsey Export'.

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.

<input type="checkbox"/>	ROBUCK, SAMANTHA 1 1	0 POINTS	\$7,800 INCOME	Submitted: 10/22/13 12:00 AM	Assigned: No Assigned User Checklist: 3 Items pending
<input type="checkbox"/>	Brown, Miley 1 0	0 POINTS	- NO INCOME	Submitted: 10/31/13 8:59 PM	Assigned: No Assigned User Checklist: 3 Items pending

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

APPLICATION SUMMARY

Submitted

Assigned ToNo Assigned User

Tenant Number26557

Checklist

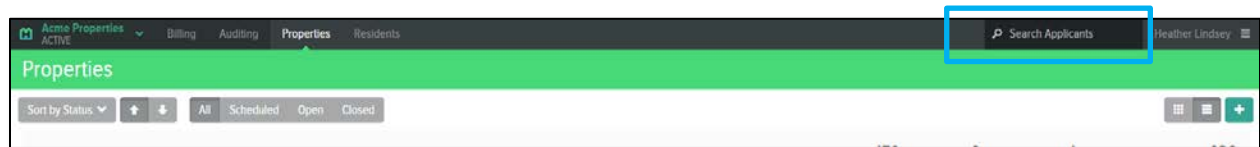
- ☒ SSN-Card
- ☐ Birth Certificate
- ☐ HUD Form

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.

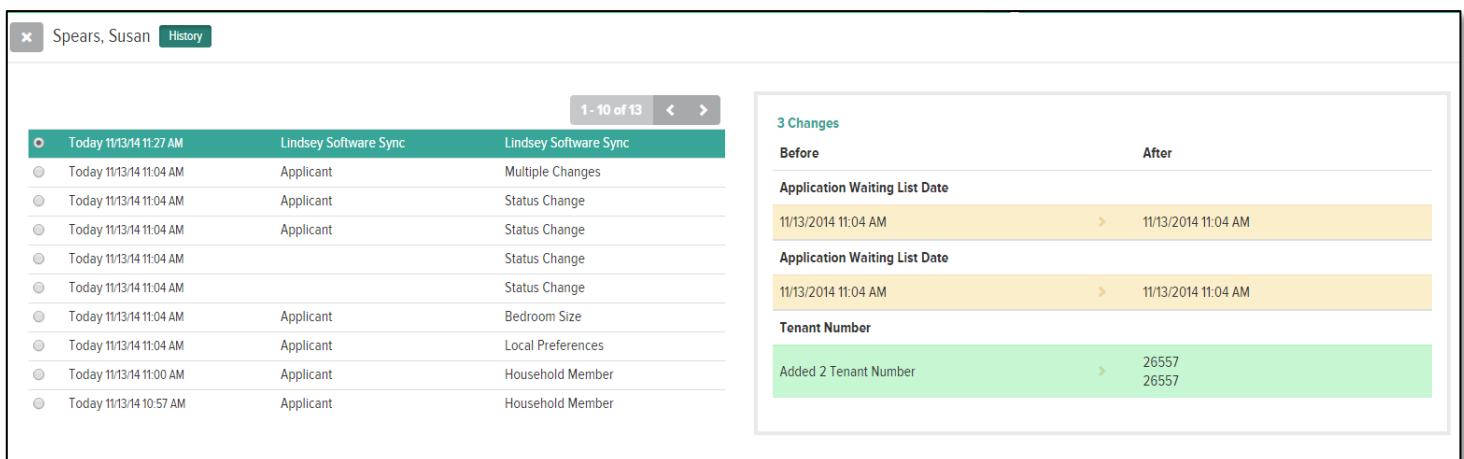
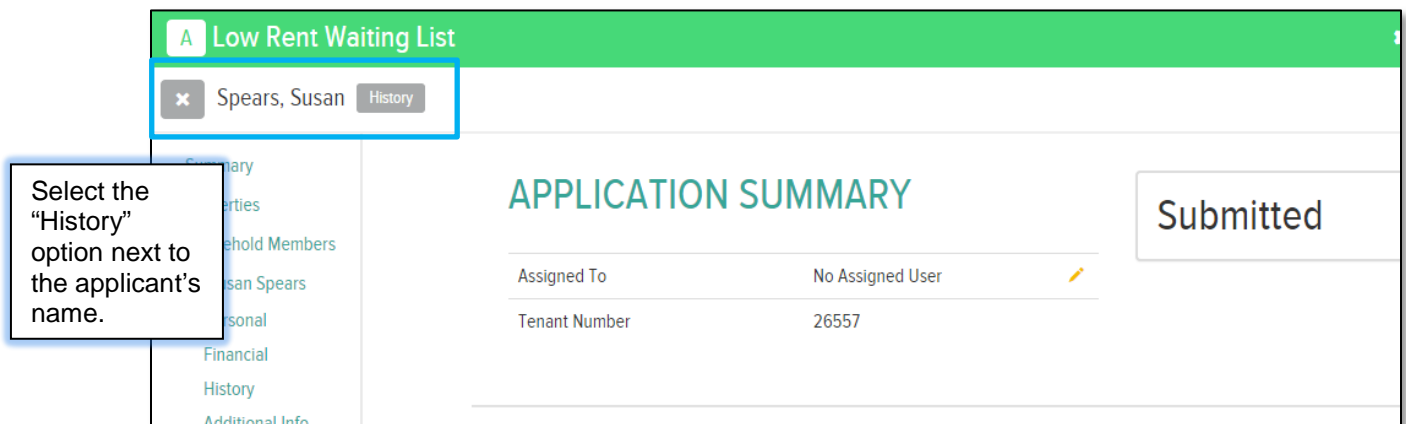
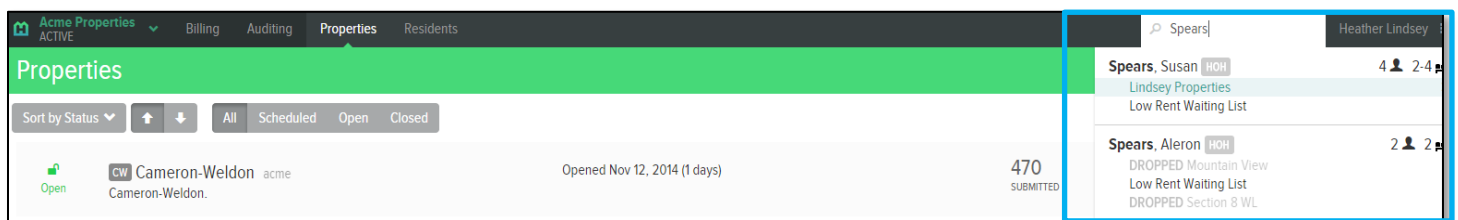
How to View Online History of an Applicant

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.

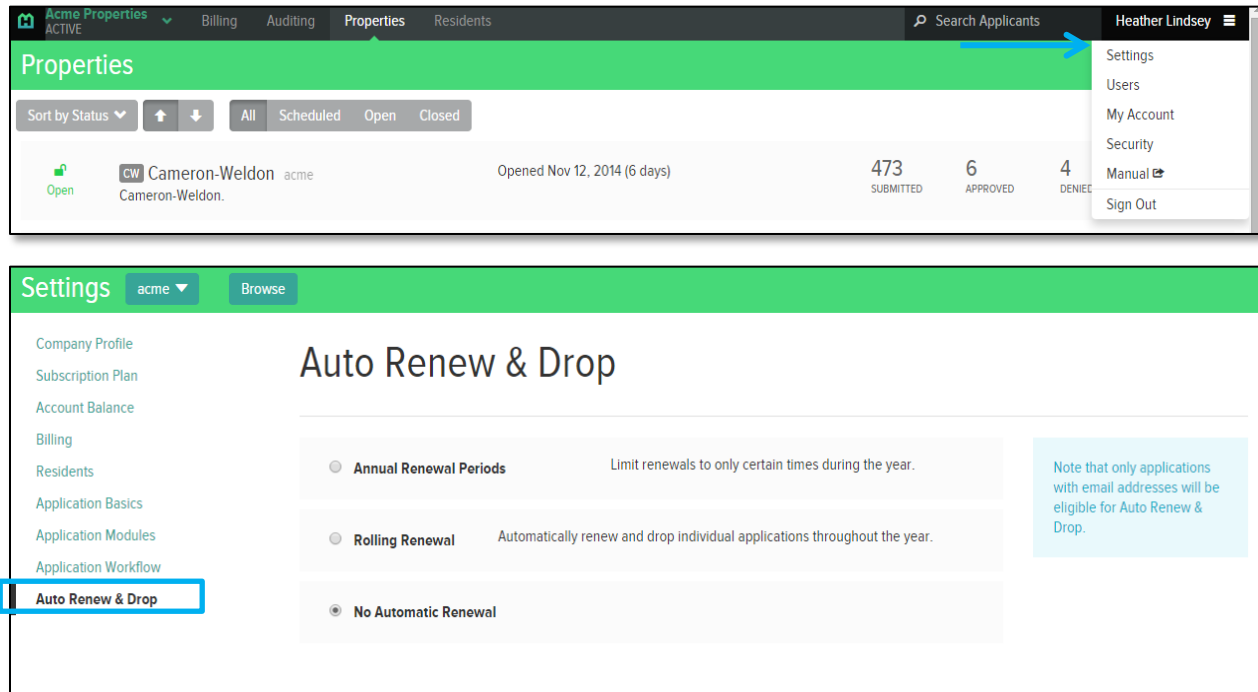


Configuring the Auto-Renewal of Applications Feature

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.

The screenshot shows the 'Annual Renewal Periods' configuration form. It includes a title 'Annual Renewal Periods' and a subtitle 'Limit renewals to only certain times during the year.' A yellow note box says 'Note: This period will start next year.' The form has two main sections: 'Notify Applicants and Start Renewal Period' and 'End Renewal Period'. The 'Start Renewal Period' section has two date pickers: one for the month (01) and one for the day (05). The 'End Renewal Period' section has two date pickers: one for the month (03) and one for the day (15). Below these are two input fields: 'Warn Applicants' (1 days) and 'Drop Applications' (2 days). A green '+ Add Renewal Period' button is at the bottom.

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 setting 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.

The screenshot shows the 'Rolling Renewal' settings. At the top, the 'Rolling Renewal' radio button is selected, with the description 'Automatically renew and drop individual applications throughout the year.' Below this, there is a text input field for 'Drop applications that have not been renewed in' with the value '180' and the unit 'days.' Further down, there are two columns of settings. The first column is titled 'Notify Applicants to Renew' and has a text input field with the value '30' followed by 'days before scheduled drop.' The second column is titled 'Warn Applicants' and has a text input field with the value '7' followed by 'days before scheduled drop.'

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.

Auto Renew & Drop

The screenshot shows the 'Auto Renew & Drop' settings. There are three radio button options: 'Annual Renewal Periods' (described as 'Limit renewals to only certain times during the year.'), 'Rolling Renewal' (described as 'Automatically renew and drop individual applications throughout the year.'), and 'No Automatic Renewal' (which is selected and highlighted with a blue border). To the right of these options is a light blue note box that says 'Note that only applications with email addresses will be eligible for Auto Renew & Drop.'

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*.

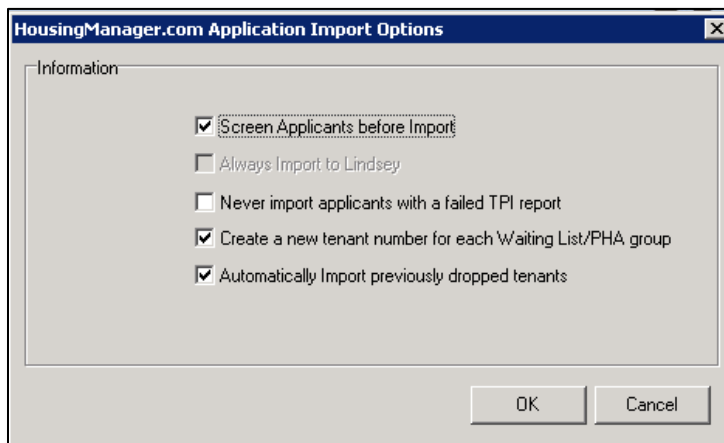
Part 4 – Downloading Applications into Lindsey Software

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**.



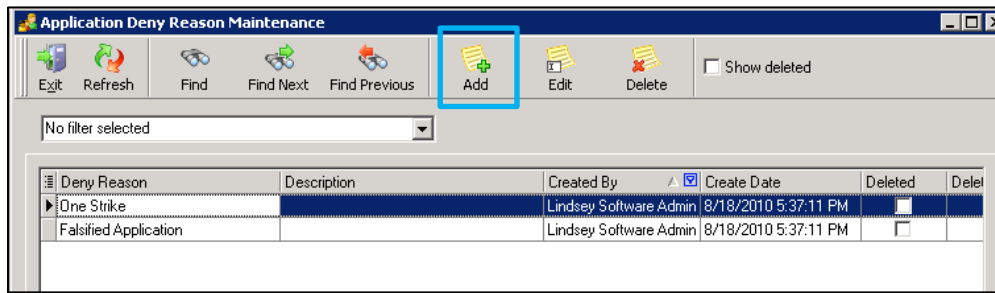
If the “Screen Applicants before Import” option is selected, online applications will be downloaded into Lindsey Software for “holding”. The applications will not have a Lindsey tenant number and will not be placed on a waiting list until the “Import” option is run. This option also allows the user to do batch screening for selected applicants PRIOR to importing those applicants into the software.

Other options include:

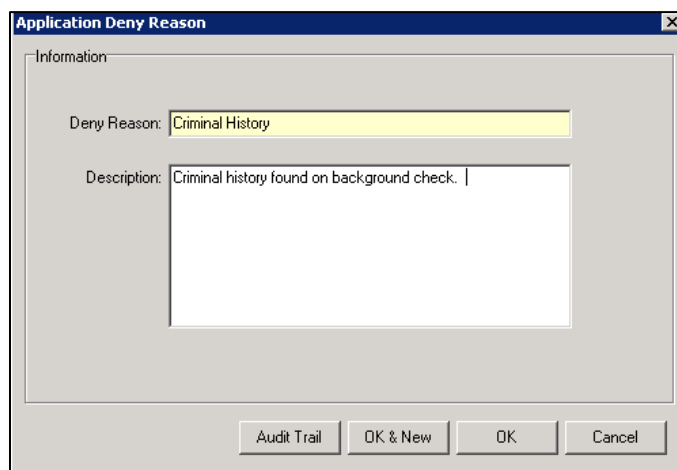
- Always Import to Lindsey – when this option is selected all online applications from HousingManager.com will be imported directly into Lindsey Software, placed on the applied for waiting list, and will receive a tenant number. This option will not be available if the “Screen Applicants before Import” box is selected.
- Never import applicants with a failed TPI report – 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.
- Create a new tenant number for each Waiting List/PHA group – 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).
- Automatically Import previously dropped tenants – 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.



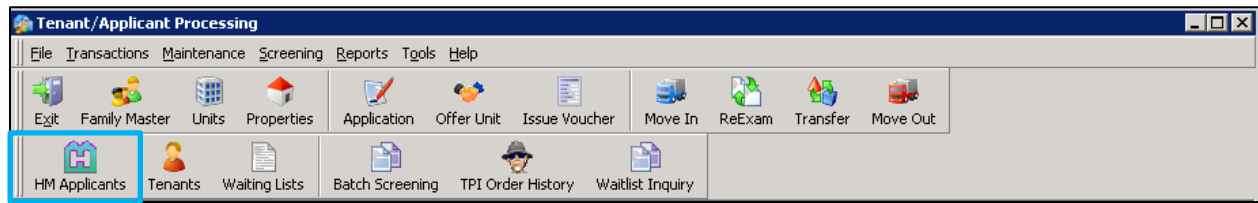
When adding a new deny application reason, enter a brief description about what the deny is for.

Select “OK” to save or “OK & New” to save and add more deny reasons.

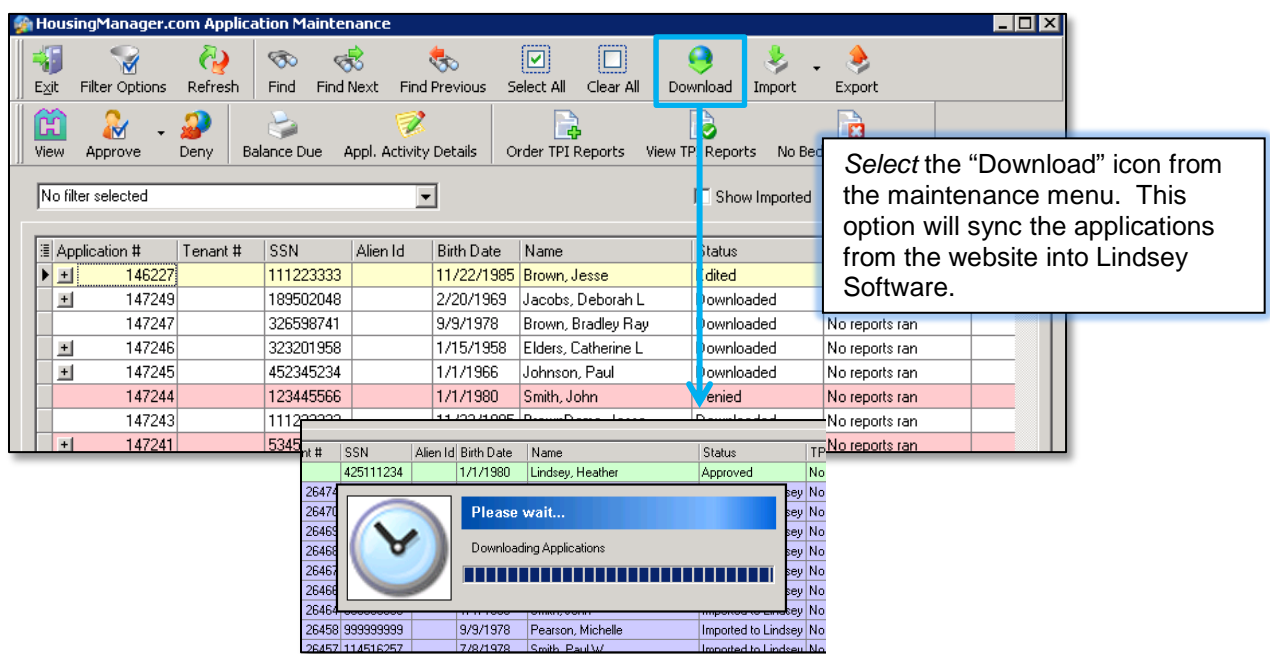
Download Process

Viewing/Downloading Online Applications through Lindsey Software

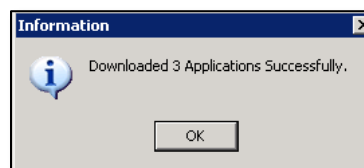
Once the user configures the import application options, the online applications are ready to be downloaded into Lindsey Software. To begin the process, *select* the “HM Applicants” icon from the Tenant Applicant Processing Module menu.



The Online Application Maintenance menu will display. This is the **MAIN TOOL** in managing the HousingManager.com online applications.

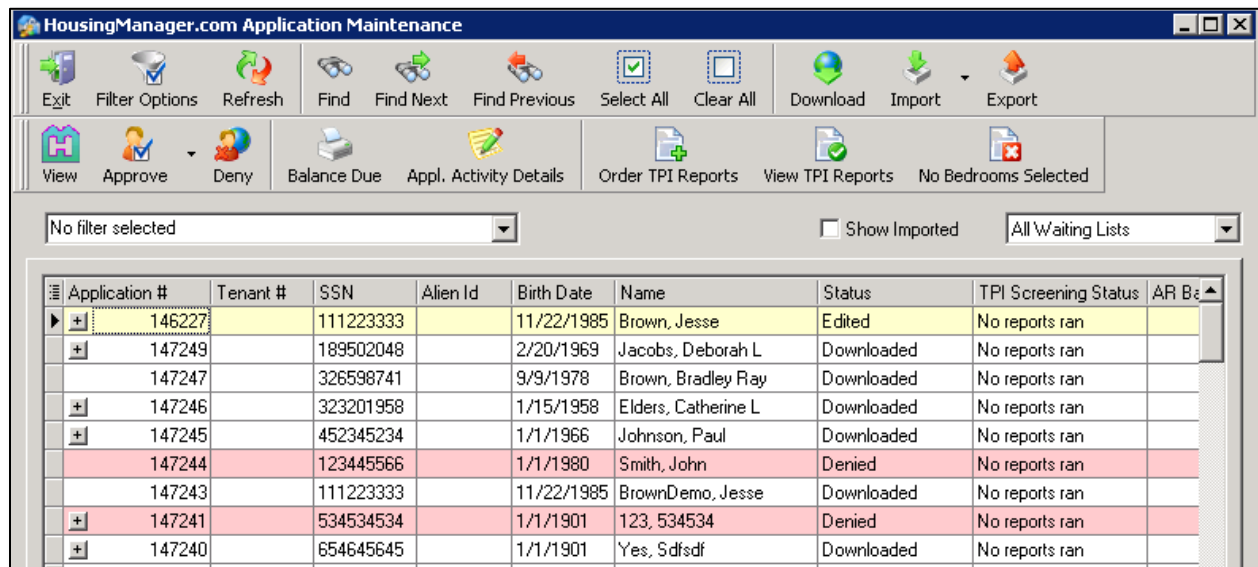


Once the download process is complete, a message will appear letting the user know how many applications were downloaded into the Online Applications Maintenance menu. If no applications are found, the software will also give a message.



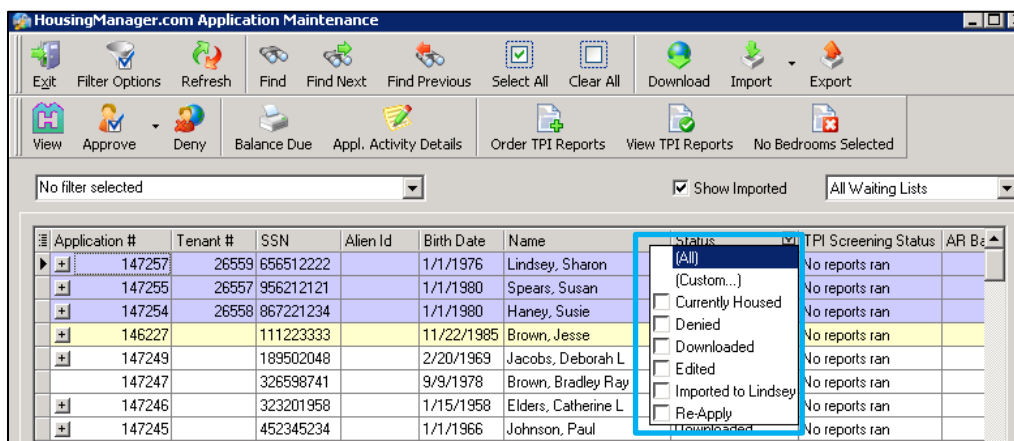
Downloaded Application Status Codes

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



Application #	Tenant #	SSN	Alien Id	Birth Date	Name	Status	TPI Screening Status	AR Bz
146227		111223333		11/22/1985	Brown, Jesse	Edited	No reports ran	
147249		189502048		2/20/1969	Jacobs, Deborah L	Downloaded	No reports ran	
147247		326598741		9/9/1978	Brown, Bradley Ray	Downloaded	No reports ran	
147246		323201958		1/15/1958	Elders, Catherine L	Downloaded	No reports ran	
147245		452345234		1/1/1966	Johnson, Paul	Downloaded	No reports ran	
147244		123445566		1/1/1980	Smith, John	Denied	No reports ran	
147243		111223333		11/22/1985	BrownDemo, Jesse	Downloaded	No reports ran	
147241		534534534		1/1/1901	123, 534534	Denied	No reports ran	
147240		654645645		1/1/1901	Yes, Sdfsdf	Downloaded	No reports ran	

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”).



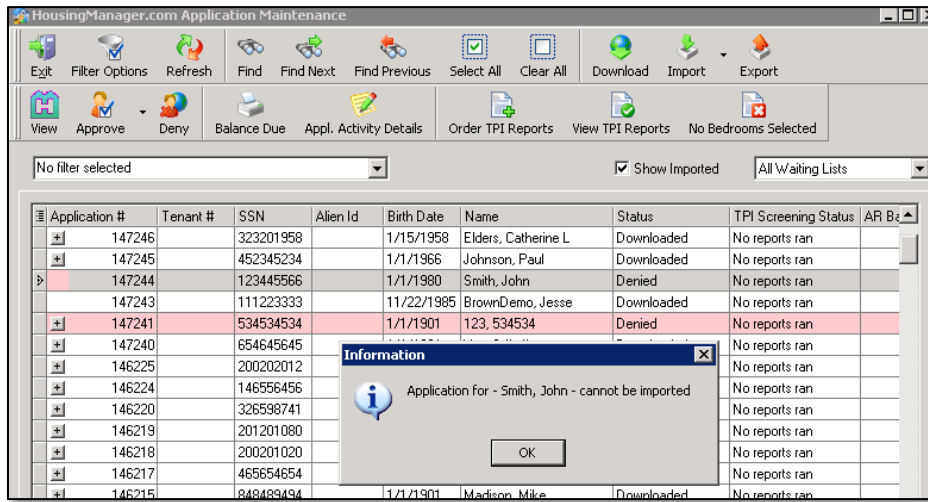
Application #	Tenant #	SSN	Alien Id	Birth Date	Name	Status	TPI Screening Status	AR Bz
147257	26559	656512222		1/1/1976	Lindsey, Sharon	(All)	No reports ran	
147255	26557	956212121		1/1/1980	Spears, Susan	(Custom...)	No reports ran	
147254	26558	867221234		1/1/1980	Haney, Susie	Currently Housed	No reports ran	
146227		111223333		11/22/1985	Brown, Jesse	Denied	No reports ran	
147249		189502048		2/20/1969	Jacobs, Deborah L	Downloaded	No reports ran	
147247		326598741		9/9/1978	Brown, Bradley Ray	Edited	No reports ran	
147246		323201958		1/15/1958	Elders, Catherine L	Imported to Lindsey	No reports ran	
147245		452345234		1/1/1966	Johnson, Paul	Re-Apply	No reports ran	
						Undeclared	No reports ran	

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”.

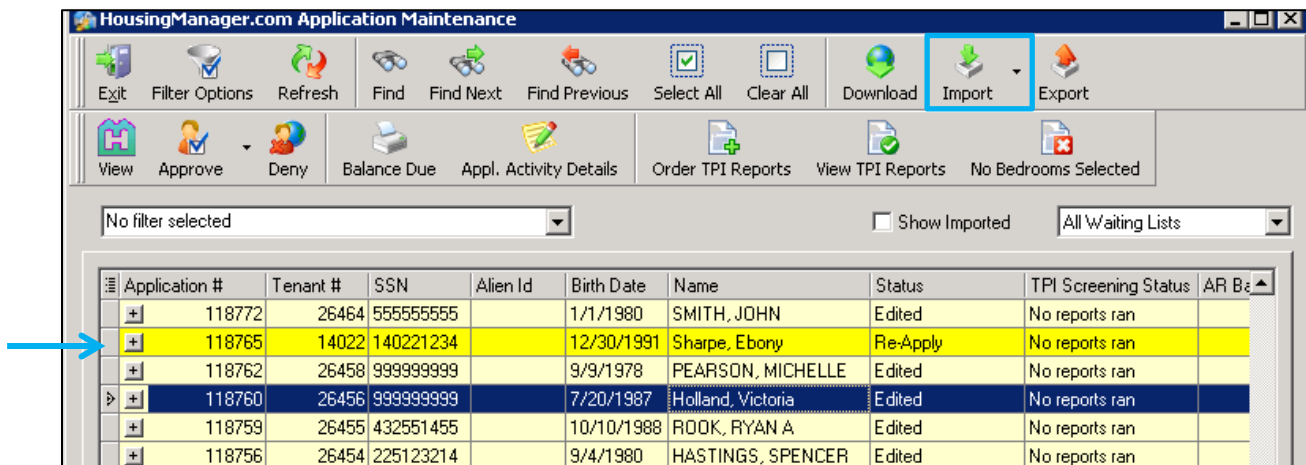


Highlight the tenant and *select* the “Import” option to import and add an unfavorable tenant to the waiting list. Tenants cannot be imported for the following:

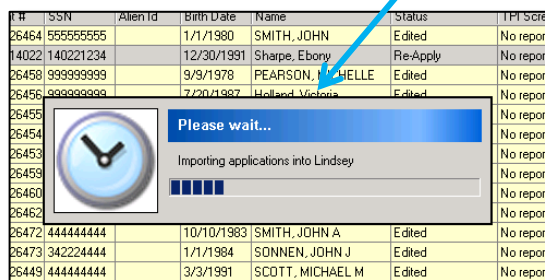
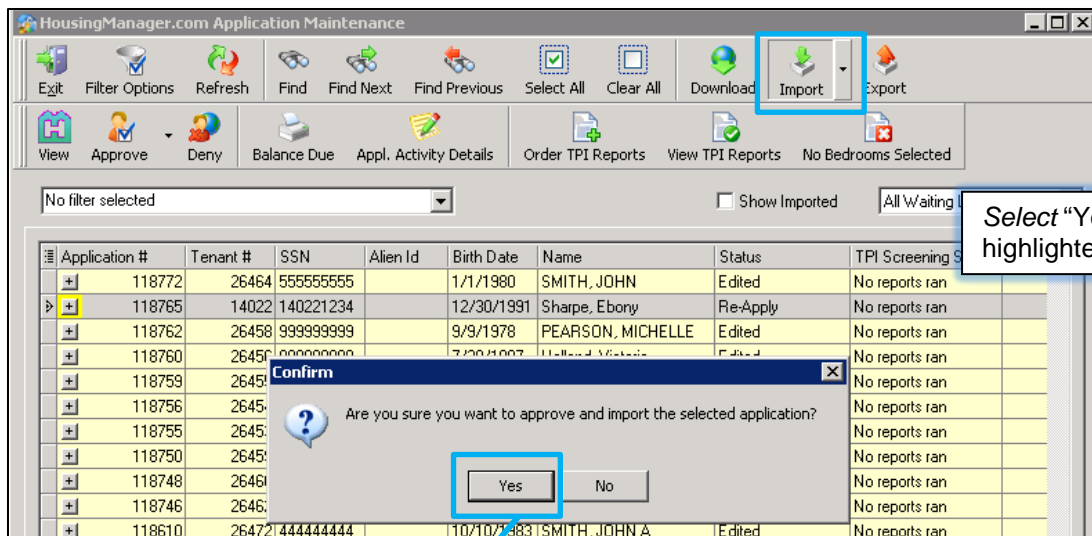
1. Denied because of TPI Report
2. Previously moved out owing a balance.

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 **NOT** 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.



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.

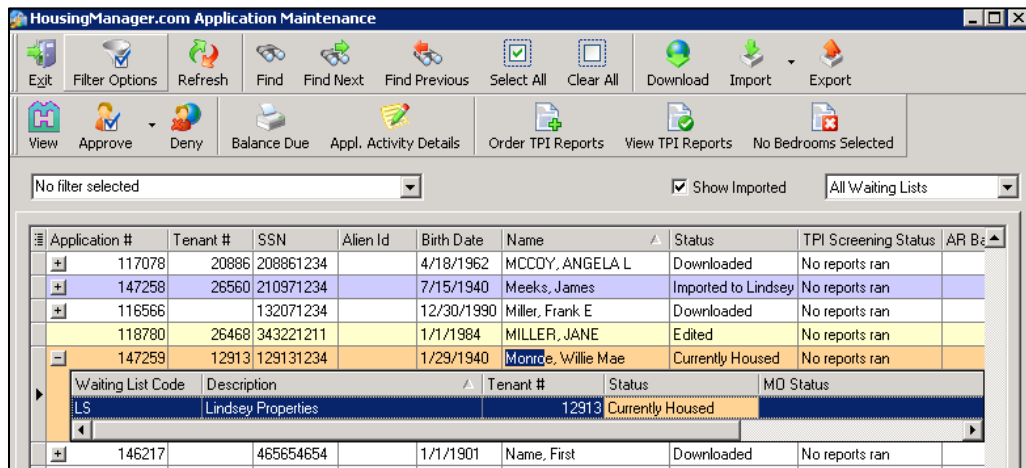
Active Tenants and Applications

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.**



The screenshot shows the 'HousingManager.com Application Maintenance' window. It features a menu bar with options like Exit, Filter Options, Refresh, Find, Find Next, Find Previous, Select All, Clear All, Download, Import, and Export. Below the menu is a toolbar with icons for View, Approve, Deny, Balance Due, Appl. Activity Details, Order TPI Reports, View TPI Reports, and No Bedrooms Selected. A dropdown menu shows 'No filter selected' and a checkbox for 'Show Imported' is checked. The main table displays a list of applications with columns for Application #, Tenant #, SSN, Alien Id, Birth Date, Name, Status, TPI Screening Status, and AR Bz. The table contains several rows, with one row highlighted in orange, indicating a 'Currently Housed' status. Below the main table, there is a section for 'Waiting List Code' and 'Description', showing 'LS' for 'Lindsey Properties' and '12913' for 'Currently Housed'.

Application #	Tenant #	SSN	Alien Id	Birth Date	Name	Status	TPI Screening Status	AR Bz
117078	20886	208861234		4/18/1962	MCCOY, ANGELA L	Downloaded	No reports ran	
147258	26560	210971234		7/15/1940	Meeks, James	Imported to Lindsey	No reports ran	
118566		132071234		12/30/1990	Miller, Frank E	Downloaded	No reports ran	
118780	26468	343221211		1/1/1984	MILLER, JANE	Edited	No reports ran	
147259	12913	129131234		1/29/1940	Monroe, Willie Mae	Currently Housed	No reports ran	
Waiting List Code Description Tenant # Status MD Status								
LS	Lindsey Properties	12913	Currently Housed					
146217		465654654		1/1/1901	Name, First	Downloaded	No reports ran	

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.

The screenshot shows the 'Low Rent Waiting List' interface. On the left is a sidebar with links: Summary, Properties, Household Members, Hannah Lindsey (selected), Personal, and Financial. The main area is titled 'APPLICATION SUMMARY' and shows the status 'Submitted'. Below this, there are two rows of information: 'Assigned To' with 'No Assigned User' and 'Tenant Number' with '26478'. A green header bar at the top contains the title 'Low Rent Waiting List' and an 'Applicants' button.

The 'Drop from Waiting List(s)' dialog box is shown. It has a 'Drop Options' title bar. Inside, there are fields for 'SSN/Alien Id' (545411212) and 'Applicant #/Name' (26478 - LINDSEY, HANNAH). Below these is a 'Waiting Lists' section showing 'A Low Rent Waiting List' with a count of '7 2'. At the bottom, there are dropdown menus for 'Drop Date' (11/18/2014), 'Drop Reason' (denied), 'Drop Notification Date' (11/18/2014), and 'Notification Comment' (denied). Buttons for 'Start Over', 'Back', 'Next', and 'Close' are at the bottom.

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

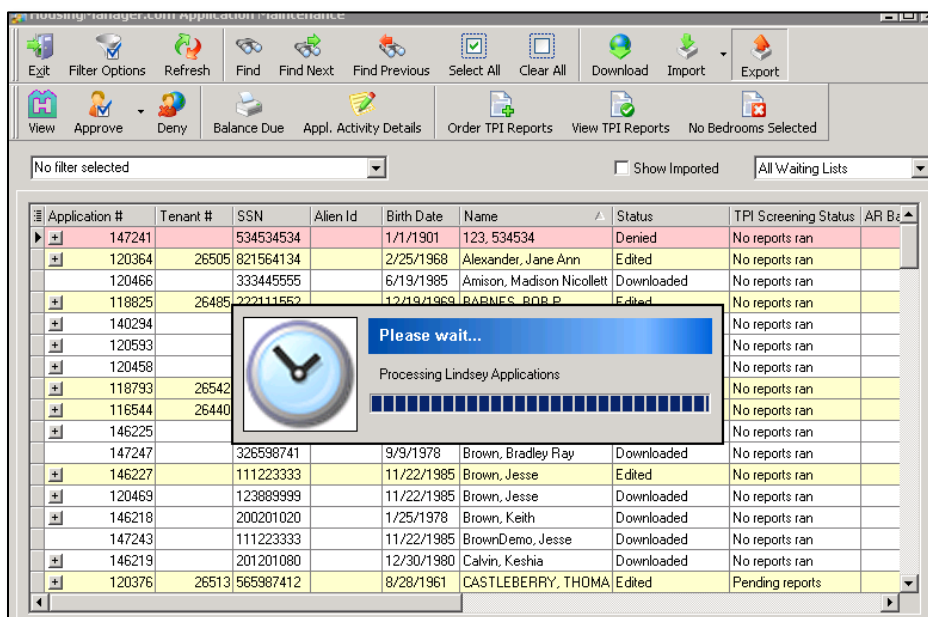
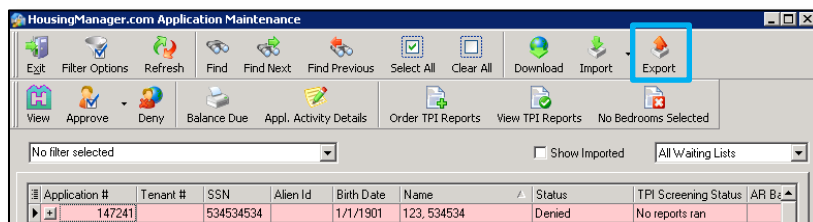
(Please allow time for processing in order for it to update on the website.)

This screenshot shows the same 'APPLICATION SUMMARY' page as before, but the status is now 'Dropped' with the reason 'denied' and the date 'Nov 18, 2014 by HEATHERL'. The rest of the interface, including the sidebar and application details, remains the same.

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.

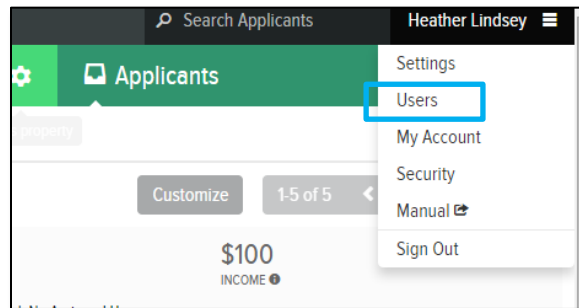
To export all applications that were entered in Lindsey Software to the HousingManager.com website, *select* the “Export” icon in the HousingManager.com Application Maintenance menu. This is typically processed with the initial export. Any changes in Lindsey Software will auto-sync behind the scenes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



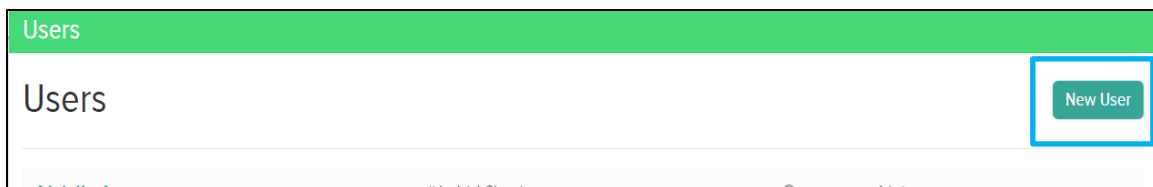
When the Export is completed, the user will see a report that will list each waiting list, the applicant exported, as well as the application date and time.

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.

A screenshot of the 'Users / heather_lindsey@lindseysoftware.com' form. The form is divided into two main sections: 'Identity' and 'Permissions'. The 'Identity' section contains fields for 'E-mail Address' (heather_lindsey@lindseysoftware.com), 'Username' (heather_lindsey@lindseysoftware.com), and 'Name' (Heather, MI, Lindsey). The 'Permissions' section has three radio button options: 'View Only', 'View and Edit' (selected), and 'Administrator'. Below the 'Permissions' section is a section for 'Assigned TPI Products' with a 'Landlord History' link.

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.

A screenshot of the 'Notifications' section in the HousingManager.com interface. It features a heading 'Notifications' and a section titled 'Notify user when someone...'. Below this, there is a checkbox labeled 'Submits or renews an Application' which is highlighted with a blue box.

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.

Assigned TPI Products

- ☒ Landlord History
 - Tenant PI Report
 - PIC Check
- ☒ Credit Bureau
 - Trans Union Report
- ☐ Criminal Background
 - US Search Plus
 - Colorado Courts
 - US Alias Search
 - AlaCourt
 - National Trace Report
 - North Carolina AOC State Search
 - Verified Multistate Criminal Search
- ☐ Eviction History
 - Eviction Search

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 Account

My Profile

Notifications

Security

Name

Heather

Lindsey

Notifications

Notify me when someone...

Submits or renews an Application

Security

Update Your Password

Current Password

New Password

Confirm New Password

In order to provide a secure password, we recommend having a password that has the following criteria:

- A length between 8 and 15 characters
- A lower case character
- An upper case character
- A special character
- A number

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.

Security Settings

Security

Enter a range of IP addresses here.

Trusted IP Addresses

Can always log in. (No device verification required)

IP


to

memphis

to

+ Add Trusted IP Addresses

Users who attempt to log in from an unknown IP range will be required to activate their device every 14 days with a verification code sent to their email address.



HousingManager.com Manual

Page | 48