

# Processing Tenant Payment Agreements

## SYSTEM JOB AID

### OVERVIEW

This job aid walks you through the steps for processing Tenant Payment Agreements (TPA). Housing Choice generates a TPA when a resident owes money to the Atlanta Housing Authority. This agreement allows the resident to pay their debt to AHA over a period of time instead of one full payment. If the Tenant can repay the overpayment to AHA in the full amount, a TPA is not necessary.

### JOB ROLES



- Housing Services Administrator
- CSG Financial Analyst
- Compliance Manager

### PREREQUISITES

Prior to processing the payment:

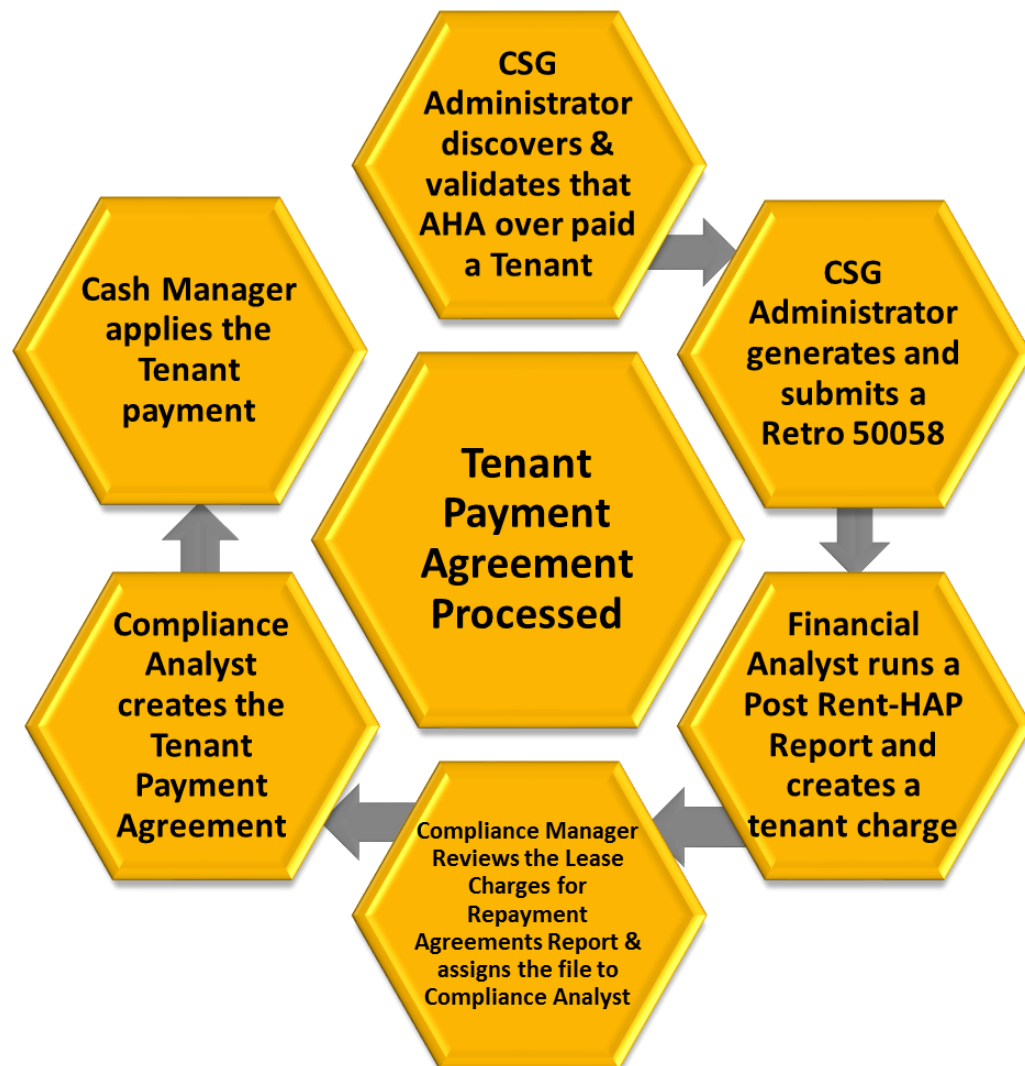
- An overpayment is identified.

## PROCESSING TENANT PAYMENT AGREEMENTS

### TENANT PAYMENT AGREEMENT PROCESS

Housing Choice, Compliance, and Finance all have roles in processing the Tenant Payment Agreement. The following diagram provides a consolidated view of these roles.

## Tenant Payment Agreement Process



## PROCESSING TENANT PAYMENT AGREEMENTS

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**This job aid explains how to:**

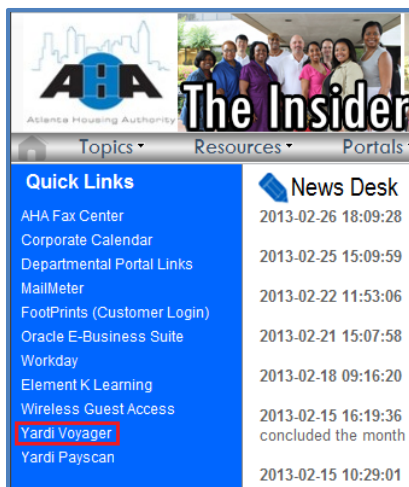
Log Into Voyager.....	3
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### LOG INTO VOYAGER

**Log into Voyager:**

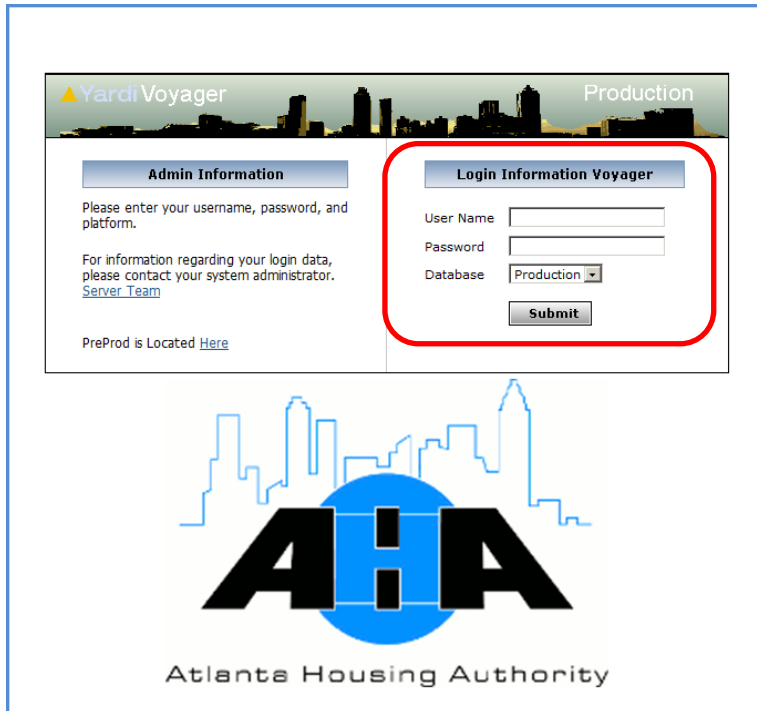
1. Log into Yardi Voyager.

**TIP** To access Yardi Voyager, use the **QUICK LINKS** menu located on the Intranet portal at: <http://theinsider/Pages/home.aspx>

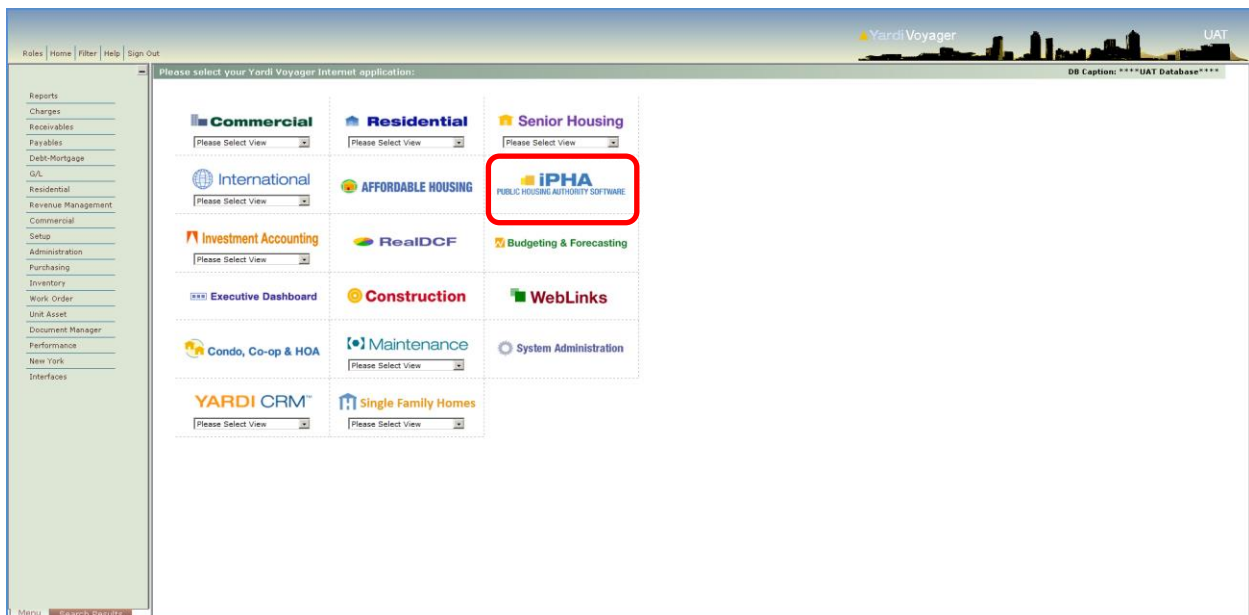


## PROCESSING TENANT PAYMENT AGREEMENTS

- When the Yardi Voyager log in screen is displayed, type your User Name and Password into the respective fields, select the appropriate Database from the drop-down list, and click **SUBMIT**.



- If the Yardi Voyager Welcome screen is displayed, click **IPHA**.



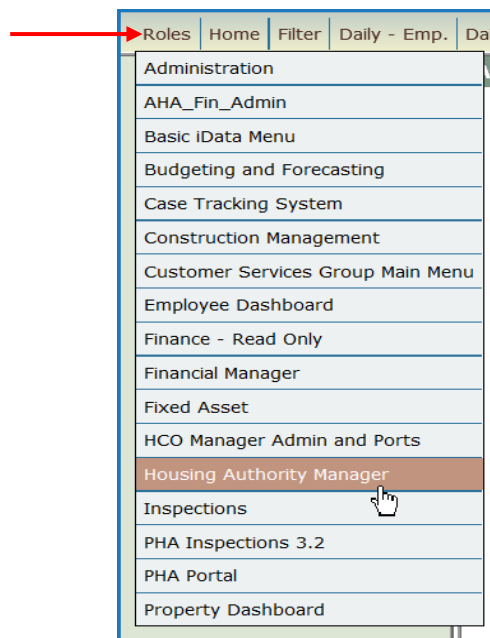
## PROCESSING TENANT PAYMENT AGREEMENTS

### CORRECT THE 50058

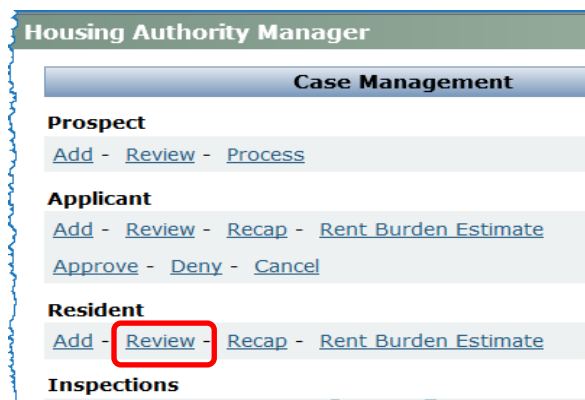
The Housing Services Administrator corrects the 50058. There must be an active 50058 in the system. Before initiating the correction, verify that the new income information is correct using the standard verification methods. If the new income is for the same time period as the last recertification period, correct the last 50058. You either correct the Annual income or make a correction and document the Interim income. If the changed amount is effective the same date of the last 50058, correct the Annual income. If the change amount occurred two months after the Annual income, correct the Interim income.

#### To correct the 50058:

1. From the Top menu, select **ROLES > HOUSING AUTHORITY MANAGER**.



2. From the **HOUSING AUTHORITY MANAGER** screen, locate the **RESIDENT** section, and select **REVIEW**.



## PROCESSING TENANT PAYMENT AGREEMENTS

The **RESIDENT** screen displays.

You can click field names that are blue underlined to select from a list.

The screenshot shows the 'Resident' screen with the following fields: Property, Unit, Resident, Last Name, Telephone Nos., Status, Lease Expires, Notes, and Display Rows (set to 5000). There are also buttons for Submit, Clear, and Help.

3. On the **RESIDENT** screen, type the tenant's t-code into the **RESIDENT** field (or click the **RESIDENT** link to search for the tenant), and click **SUBMIT**.

The screenshot shows the 'Resident' screen with the 'Resident' field populated with 't1027004'. The text 'HICKSON, RITA (vo\_mtw, 3880)' is visible to the right of the field. The 'Submit' button is highlighted with a red box.

## PROCESSING TENANT PAYMENT AGREEMENTS

The **RESIDENT** detail screen displays.

Resident		Property Info		Functions			
First Name	RITA MI <input type="checkbox"/>	Resident ID	t1027004	<a href="#">Renew Lease</a> <a href="#">Adjust Lease End</a> <a href="#">Month to month</a> <a href="#">Reverse Move In</a> <a href="#">Notice</a> <a href="#">Move Out Calculator</a> <a href="#">Evict</a> <a href="#">Assign Unit</a> <a href="#">Apply Deposit</a> <a href="#">Charge</a> <a href="#">Transfer To Property</a> <a href="#">Abatement</a> <a href="#">PRH Tenant Hold</a> <a href="#">Tenant Payment Agreement</a> <a href="#">Legal</a> <a href="#">Credit Check</a> <hr/> <b>Data</b> <a href="#">Family Detail Info</a> <a href="#">Lease Charges</a> <a href="#">Waiting Lists</a> <a href="#">Inspection</a> <a href="#">URP Distribution</a> <a href="#">Roommates</a> <a href="#">Attachment</a> <a href="#">Memo</a> <a href="#">Contact</a> <a href="#">Email</a> <a href="#">EFT Setup</a> <a href="#">Credit Card Setup</a> <a href="#">Resident History</a> <a href="#">Manage Rentable Items</a> <a href="#">New WO</a>			
Last Name	HICKSON	Property	vo_mtw				
Address	1068 JOSEPH E BOONE BLVD NW	Unit	38807				
City-St-Zip	ATLANTA GA 30314-2744	Status	Current				
E-mail		Legal	N/A				
Alt. E-mail		Payment Method	Any				
Office		Payable Method	Check				
Home	(404) 333-5691						
FAX							
Mobile							
<input type="button" value="Save"/> <input type="button" value="New"/> <input type="button" value="Help"/>							
Lease Info		Deposit Info		Lease Charges		Other Info	
<b>Lease Information</b>				<b>Late Fee</b>			
Mkt. Rent	0.00	Rent	0.00	Base %	0.00	% Owed-total	
Due Day	1	Other Charges	0.00	Grace Period	6		
Move In	10/01/2008	Total Charges	0.00	2nd %	0.00	% Owed-total	
Lease Sign		Notice		2nd Grace	0		
Lease From	10/01/2008	Move Out	11/30/2009	Max %	0.00	% Owed-total	
Lease To	11/30/2009	Lease Desc		\$/day	0.00		
Last Renewal		Responsibility Date		Max # Days	0		
Subsidized <input checked="" type="checkbox"/>				Minimum Due	0.00		

## PROCESSING TENANT PAYMENT AGREEMENTS

4. Under the **DATA** column, click the **FAMILY DETAIL INFO** link.

Resident		Property Info		Functions																																	
First Name	RITA MI	Resident ID	t1027004	<a href="#">Renew Lease</a>																																	
Last Name	HICKSON	Property	vo_mtw	<a href="#">Adjust Lease End</a>																																	
Address	1068 JOSEPH E BOONE BLVD NW	Unit	38807	<a href="#">Month to month</a>																																	
City-St-Zip	ATLANTA GA 30314-2744	Status	Current	<a href="#">Reverse Move In</a>																																	
E-mail		Legal	N/A	<a href="#">Notice</a>																																	
Alt. E-mail		Payment Method	Any	<a href="#">Move Out Calculator</a>																																	
Office		Payable Method	Check	<a href="#">Evict</a>																																	
Home	(404) 333-5691			<a href="#">Assign Unit</a>																																	
FAX				<a href="#">Apply Deposit</a>																																	
Mobile				<a href="#">Charge</a>																																	
<input type="button" value="Save"/> <input type="button" value="New"/> <input type="button" value="Help"/>				<a href="#">Transfer To Property</a>																																	
<b>Lease Info</b>   Deposit Info   Lease Charges   Other Info				<a href="#">Abatement</a>																																	
<table border="1"> <thead> <tr> <th colspan="2">Lease Information</th> <th colspan="2">Late Fee</th> </tr> </thead> <tbody> <tr> <td>Mkt. Rent</td> <td>0.00</td> <td>Rent</td> <td>0.00</td> </tr> <tr> <td>Due Day</td> <td>1</td> <td>Other Charges</td> <td>0.00</td> </tr> <tr> <td>Move In</td> <td>10/01/2008</td> <td>Total Charges</td> <td>0.00</td> </tr> <tr> <td>Lease Sign</td> <td></td> <td>Notice</td> <td></td> </tr> <tr> <td>Lease From</td> <td>10/01/2008</td> <td>Move Out</td> <td>11/30/2009</td> </tr> <tr> <td>Lease To</td> <td>11/30/2009</td> <td>Lease Desc</td> <td></td> </tr> <tr> <td>Last Renewal</td> <td></td> <td>Responsibility Date</td> <td></td> </tr> </tbody> </table>		Lease Information		Late Fee		Mkt. Rent	0.00	Rent	0.00	Due Day	1	Other Charges	0.00	Move In	10/01/2008	Total Charges	0.00	Lease Sign		Notice		Lease From	10/01/2008	Move Out	11/30/2009	Lease To	11/30/2009	Lease Desc		Last Renewal		Responsibility Date				<a href="#">PRH Tenant Hold</a>	
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				<a href="#">Manage Rentable Items</a>																																	
				<a href="#">New WO</a>																																	

The **FAMILY DETAIL INFO** screen displays. It contains all pertinent information about the tenant and their family.



## PROCESSING TENANT PAYMENT AGREEMENTS

5. On the **FAMILY DETAIL INFO** screen, locate the **SUMMARY** tab, and click the **ANNUAL INCOME** link.

**Family Detail Info**

**Family Info**

Property	<a href="#">vo_mtw</a>	Tenant	<a href="#">t1027004</a>	Caseworker	<input type="text"/>
Unit	<a href="#">38807</a>	HoH Name	HICKSON, RITA	Program (1c.)	VO-Voucher <input type="text"/>
Owner	<a href="#">v0204209</a>	HoH SSN	253-08-4375	Legal	N/A
Last Action		Current Action	2-Annual <input type="text"/>	FSS Caseworker	<input type="text"/>
Last Action ...		Effective Date	02/01/2013 <input type="text"/>		

**Summary**
General
Admission
Special Programs
Delinquency

<a href="#"># Family Members</a>	7	# of Dependents	5	Medical Threshold	0.00
Asset Cash Value	0.00	Asset Income	0.00	Elderly/Disabled Allowance	0.00
<span style="border: 1px solid red; padding: 2px;"><a href="#">Annual Income</a></span>	46,048.00	Excluded Income	0.00	Dependent Allowance	3,750.00
Disability Expense	0.00	Excluded Disability	0.00	Estimated TTP	1,058.00
Medical Expense	0.00	Excluded Medical	0.00	40% of AMI for HCV Max R...	1,410.00
Child Care Expense	0.00	Excluded Childcare	0.00	Tenant Rent	1,058.00
FSS Page		FSS Escrow Balance		Housing Assistance Payment	202.00
<a href="#">Family Verifications</a>	3	Outstanding Verifications	3		
Community Service	Not Applicable	Comm Serv Last reviewed	Not Applica...		
<a href="#">Voucher</a>	Attached	EID Status	Not Used		
<a href="#">Portability</a>	Not Used				
<a href="#">Vo/RFTA Tracking</a>					
<a href="#">Work Requirement</a>	In-Progress				

**Functions**

[Clear All Verifications](#)  
[Issue Offer](#)  
[Update Vo/RFTA Status](#)

**Data**

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The **FAMILY INCOME** screen displays. This screen provides access to all family members' income details.

## PROCESSING TENANT PAYMENT AGREEMENTS



6. On the **FAMILY INCOME** screen, click the **INCOME INFO** tab, and update the tenant's income using the following field information.

<b>FAMILY MEMBER</b>	Select the tenant from the drop-down list.
<b>INCOME CODE</b>	Select <b>W-OTHER WAGE</b> .
<b>\$/PERIOD - # OF PERIODS</b>	Type the amount of overpayment in the first blue field, and type the number of months AHA overpaid the tenant in the second blue field.
<b>PAYMENT FREQUENCY</b>	Select <b>ANNUAL</b> or <b>INTERIM</b> .
<b>PAYMENT PERIODS PER YEAR</b>	Type the number of payment periods in a year for this tenant.

**NOTE:** If the tenant's extra income was temporary, update the Annual income for the two months that the tenant worked, and update the Interim income for the next month to the present.

## PROCESSING TENANT PAYMENT AGREEMENTS

- Click **SAVE**. The **FAMILY INCOME** screen refreshes, adding an **EARNED INCOME DETAILS** section to the bottom of the screen.
- Use the following information to complete the **EARNED INCOME DETAILS** section of the **FAMILY INCOME** screen. This is information about the additional income the tenant received that created the overpayment.

Earned Income Details	
Hours Worked Per Week	<input style="background-color: #e0e0e0;" type="text" value="0"/>
Employer	<input style="background-color: #e0e0e0;" type="text"/>
Date Employment Began	<input style="background-color: #e0e0e0;" type="text"/> 
Date Employment Ended	<input type="text"/> 
Supervisor	<input type="text"/>
Phone	<input type="text"/>
Notes	<input type="text"/>
Industry	<input type="text"/>
No Fault of Their Own	<input type="checkbox"/>

Fields highlighted in blue are required fields that you must populate.

<b>HOURS WORKED PER WEEK</b>	Type the amount of hours the tenant works per week.
<b>EMPLOYER</b>	Type the name of the tenant's employer.
<b>DATE EMPLOYMENT BEGAN</b>	Type or select the date the tenant's employment began.

- Click **SAVE**. Close the **FAMILY INCOME** screen. The **FAMILY DETAIL INFO** screen displays again.

## PROCESSING TENANT PAYMENT AGREEMENTS

10. On the Family Detail Info screen, locate the **ALERTS** button in the middle of the screen. If there are numbers other than zero (0) on the button, the system identified items you must fix. In our example, there is one alert. You must fix the alerts before proceeding.

**Family Detail Info**

Family Info

Property	vo_mtw	Tenant	t1027004	Caseworker	
Unit	38807	HoH Name	HICKSON, RITA A	Program (1c.)	VO-Voucher
Owner	v0204209	HoH SSN	253-08-4375	Legal	N/A
Last Action		Current Action	2-Annual	FSS Caseworker	
Last Action ...		Effective Date	02/01/2013		

Save    **Alerts (1/0/0)**    Help

Add 58    Review 58 (1)    Manage 58s

Summary	General	Admission	Special Programs	Delinquency	
<a href="#"># Family Members</a>	7	# of Dependents	4	Medical Threshold	0.00
Asset Cash Value	0.00	Asset Income	0.00	Elderly/Disabled Allowance	0.00
<a href="#">Annual Income</a>	46,048.00	Excluded Income	0.00	Dependent Allowance	3,000.00
Disability Expense	0.00	Excluded Disability	0.00	Estimated TTP	1,076.00
Medical Expense	0.00	Excluded Medical	0.00	40% of AMI for HCV Max R...	1,435.00
Child Care Expense	0.00	Excluded Childcare	0.00	Tenant Rent	1,076.00
FSS Page		FSS Escrow Balance		Housing Assistance Payment	184.00
<a href="#">Family Verifications</a>	3	Outstanding Verifications	3		
Community Service	Not Applicable	Comm Serv Last reviewed	Not Applica...		
<a href="#">Voucher</a>	Attached	EID Status	Not Used		
<a href="#">Portability</a>	Not Used				
<a href="#">Vo/RFTA Tracking</a>					
<a href="#">Work Requirement</a>					

Functions

- [Clear All Verifications](#)
- [Issue Offer](#)
- [Update Vo/RFTA Status](#)

Data

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## PROCESSING TENANT PAYMENT AGREEMENTS

- 11.** Click **ALERTS**. The **ALERTS** screen displays showing any alerts, warnings, and fatal issues for this tenant. In our example, there is a verification error. Voyager wants to know if the income information was verified.

**Alerts**

**Alerts for t1027004 for FDI Ctrl # 15497**

Property	<a href="#">vo_mtw</a>	HoH Name	HICKSON, RITA A	
Unit	<a href="#">38807</a>	HoH SSN	253-08-4375	
Tenant	<a href="#">t1027004</a>	50058 Action Type	2-Annual	<a href="#">Help</a>
Owner	<a href="#">v0204209</a>	50058 Effective Date	02/01/2013	<a href="#">Close</a>

Display Message Types:

All  
  Fatal (1)  
  Warnings  
  Alerts  
  Calculated (6)  
  Lookups (1)  
  Changed Data (2)  
  Other

Fatal (1)
Warning

**Fatal Messages**

Message Code	Message	HUD Error Code	HUD Field #	HUD Field Name	How to Fix	Jump To Fix
Verif-001	Verifications Incomplete/Old - Cannot Approve 58!	n/a	n/a	n/a	Complete verifications for household HICKSON, RITA A.	<a href="#">Verifications</a>

- 12.** Under the **JUMP TO FIX** column, click the **VERIFICATIONS** link to fix the problem. Use AHA standard verification methods for verifications.

## PROCESSING TENANT PAYMENT AGREEMENTS

### ADD A NEW 50058

In the previous section, we changed the tenant’s income on the **FAMILY INCOME** screen to reflect their accurate income. Now we must add a new 50058 for that tenant.

**To add a new 50058:**

1. On the **FAMILY DETAIL INFO** screen, click **ADD 58**.

Family Detail Info

Family Info					
Property	<input type="text" value="vo_mtw"/>	Tenant	<input type="text" value="t1027004"/>	Caseworker	<input type="text"/>
Unit	<input type="text" value="38807"/>	HoH Name	<input type="text" value="HICKSON, RITA A"/>	Program (1c.)	<input type="text" value="VO-Voucher"/>
Owner	<input type="text" value="v0204209"/>	HoH SSN	<input type="text" value="253-08-4375"/>	Legal	<input type="text" value="N/A"/>
Last Action	<input type="text"/>	Current Action	<input type="text" value="2-Annual"/>	FSS Caseworker	<input type="text"/>
Last Action ...	<input type="text"/>	Effective Date	<input type="text" value="02/01/2013"/>		

Summary	General	Admission	Special Programs	Delinquency	
<a href="#"># Family Members</a>	<input type="text" value="7"/>	<a href="#"># of Dependents</a>	<input type="text" value="5"/>	<a href="#">Medical Threshold</a>	<input type="text" value="0.00"/>
<a href="#">Asset Cash Value</a>	<input type="text" value="0.00"/>	<a href="#">Asset Income</a>	<input type="text" value="0.00"/>	<a href="#">Elderly/Disabled Allowance</a>	<input type="text" value="0.00"/>
<a href="#">Annual Income</a>	<input type="text" value="46,048.00"/>	<a href="#">Excluded Income</a>	<input type="text" value="0.00"/>	<a href="#">Dependent Allowance</a>	<input type="text" value="3,750.00"/>
<a href="#">Disability Expense</a>	<input type="text" value="0.00"/>	<a href="#">Excluded Disability</a>	<input type="text" value="0.00"/>	<a href="#">Estimated TTP</a>	<input type="text" value="1,058.00"/>
<a href="#">Medical Expense</a>	<input type="text" value="0.00"/>	<a href="#">Excluded Medical</a>	<input type="text" value="0.00"/>	<a href="#">40% of AMI for HCV Max R...</a>	<input type="text" value="1,410.00"/>
<a href="#">Child Care Expense</a>	<input type="text" value="0.00"/>	<a href="#">Excluded Childcare</a>	<input type="text" value="0.00"/>	<a href="#">Tenant Rent</a>	<input type="text" value="1,058.00"/>
<a href="#">FSS Page</a>	<input type="text"/>	<a href="#">FSS Escrow Balance</a>	<input type="text"/>	<a href="#">Housing Assistance Payment</a>	<input type="text" value="202.00"/>
<a href="#">Family Verifications</a>	<input type="text" value="3"/>	<a href="#">Outstanding Verifications</a>	<input type="text" value="3"/>		
<a href="#">Community Service</a>	<input type="text" value="Not Applicable"/>	<a href="#">Comm Serv Last reviewed</a>	<input type="text" value="Not Applica..."/>		
<a href="#">Voucher</a>	<input type="text" value="Attached"/>	<a href="#">EID Status</a>	<input type="text" value="Not Used"/>		
<a href="#">Portability</a>	<input type="text" value="Not Used"/>				
<a href="#">Vo/RFTA Tracking</a>	<input type="text"/>				
<a href="#">Work Requirement</a>	<input type="text" value="In-Progress"/>				

Functions
<a href="#">Clear All Verifications</a>
<a href="#">Issue Offer</a>
<a href="#">Update Vo/RFTA Status</a>

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<a href="#">Memo</a>
<a href="#">Unit PHA Program Info</a>
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<a href="#">Briefing Packet</a>
<a href="#">Utility Chart</a>
<a href="#">Review Memos</a>
<a href="#">Portability Payment Schedule</a>
<a href="#">Resident Subsidy Schedule</a>

## PROCESSING TENANT PAYMENT AGREEMENTS

A New 50058 screen displays.

**New 50058**

Program

Type of Action

Effective Date

Previous 50058s

**50058 History (Last 10 50058s)**

Action Type	Effective Date	Approved Date	User Approved
3-Interim	06/01/2013	09/27/2013	wrandall
2-Annual	02/01/2013	09/27/2013	gbowens

## PROCESSING TENANT PAYMENT AGREEMENTS

- On the **New 50058** screen, type or select an Effective Date, select a Previous 50058 from the drop-down list, and click **SUBMIT**.

**New 50058**

Program VO-Voucher ▼

Type of Action 2-Annual ▼

Effective Date 06/01/2013

Previous 50058s ( 2 ) 02/01/2013 Ctrl#6639 ▼

**50058 History (Last 10 50058s)**

Action Type	Effective Date	Approved Date	User Approved
3-Interim	06/01/2013	09/27/2013	wrandall
2-Annual	02/01/2013	09/27/2013	gbowens

**PROGRAM**

Select the type of Program this new 50058 is for. Here are your options:

VO-Voucher ▼

- P -Public
- CE-Certificate
- VO-Voucher
- MR-ModRehab
- H -Homeownership
- PV-Proj Based Voucher

**TYPE OF ACTION**

**NEED DESCRIPTION OF THESE ACTION TYPES**

**EFFECTIVE DATE**

Type or select the date that this 50058 is effective.

**PREVIOUS 50058s**

Select a previous 50058 to ?????



## PROCESSING TENANT PAYMENT AGREEMENTS

The **FAMILY INFO** screen displays.

**Family Info**

**!** Page contains errors!

- There are Fatal errors on this page. You will not be able to approve 50058 until errors are corrected. Please check Alerts for details.

Review Family Records	Resident Information		Functions																																				
<p>( 2 ) 02/01/13 (1) ( 2 ) 02/01/13</p>	<p>Property <u>vo_mtw</u></p> <p>Unit <u>3880Z</u></p> <p>Tenant <u>t1027004</u></p> <p>HoH Name <u>HICKSON, RITA A</u></p> <p>HoH SSN <u>253-08-4375</u></p> <p>Address <u>1068 JOSEPH E BOONE BLVD NW</u></p> <p>City <u>ATLANTA, GA 303142744</u></p> <p>Owner <u>v0204209</u></p> <p>Caseworker <input type="text"/></p> <p>Program Settings <u>mtw</u></p>	<p><b>Ctrl #22702</b></p> <p>2a. Action Type <u>2-Annual</u></p> <p>2b. Date Effective <u>02/01/2013</u></p> <p>Correction # <u>1</u></p> <p>Date Modified <u>09/30/2013</u></p> <p>Date Lease Ends <input type="text"/></p> <p>Approve 50058 <input type="checkbox"/></p> <p>Program Type <u>VO-Voucher</u></p>	<div style="border: 1px solid black; padding: 2px; background-color: #e0e0e0; text-align: center;"><b>Data</b></div> <p><a href="#">Family Verifications</a></p> <p><a href="#">Attachment</a></p> <div style="border: 1px solid black; padding: 2px; background-color: #e0e0e0; text-align: center; margin-top: 10px;"><b>Reports</b></div> <p><a href="#">Print 58</a></p> <p><a href="#">Print MTW 58</a></p> <p><a href="#">Third Party Pymts</a></p> <p><a href="#">Portability Payment Schedule</a></p>																																				
<p><input type="button" value="Save"/> <input type="button" value="Delete"/> <input type="button" value="Help"/></p> <p><input type="button" value="Alerts (3/1/0)"/> <input type="button" value="Close"/></p>																																							
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Unit</th> <th>Asset</th> <th>Income</th> <th>Expense</th> <th>MTW</th> <th>Adjustments</th> </tr> <tr> <th colspan="2">TTP</th> <th colspan="2"></th> <th colspan="2">Voucher</th> </tr> <tr> <th>Display Fields</th> <th>Audit</th> <th>Agency</th> <th>Action</th> <th>Member</th> <th>Background</th> </tr> </thead> </table>				Unit	Asset	Income	Expense	MTW	Adjustments	TTP				Voucher		Display Fields	Audit	Agency	Action	Member	Background																		
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If the Family Info screen displays. . .	Then . . .
Without errors	Skip step 3 and continue to step 4.
With errors	Complete step 3 and then continue to step 4.

## PROCESSING TENANT PAYMENT AGREEMENTS

- Click **ALERTS**. The **ALERTS** screen is displayed. The lower half of the screen provides detail information about the alerts. You must review the alerts before proceeding. See the Voyager Interface Basics Job Aid for detailed information about Alerts.

**Alerts**

**Alerts for t1027004 for 50058 Ctrl # 22702**

Property	vo_mtw	HoH Name	HICKSON, RITA A
Unit	38807	HoH SSN	253-08-4375
Tenant	t1027004	50058 Action Type	2-Annual
Owner	vo204209	50058 Effective Date	02/01/2013

Display Message Types:  
 All    Fatal (3)    Warning (1)    Alerts    Calculated (1)    Lookups    Changed Data (2)    Other

**Fatal (3)**   **Warning (1)**

**Fatal Messages**

Message Code	Message	HUD Error Code	HUD Field #	HUD Field Name	How to Fix	Jump To Fix
B-2d-001	Correction Code is invalid, must be 1, 2, 3 or 4.	n/a	2d	Correction Code		
B-2i-003	ReExam date must be valued, if action type is '1','2','3','4','7','9','12' or '14'.	4100	2i	Projected Effective Date of Next ReExam		
T-3h-006	Member Relation Code cannot be 'Y' if member age is 18 or older.	5336	3h	Member Relation Code	User must correct Member Relation Code in Tenant->Family Detail Info-># Family Members for member SHAWN DREKA HICKSON D	<a href="#">Family Member</a>

- Return to the **FAMILY DETAIL INFO** screen, and **CLICK ADD 58**.

**Family Detail Info**

**Family Info**

Property	vo_mtw	Tenant	t1027004	Caseworker	
Unit	38807	HoH Name	HICKSON, RITA A	Program (1c.)	VO-Voucher
Owner	vo204209	HoH SSN	253-08-4375	Legal	N/A
Last Action		Current Action	2-Annual	FSS Caseworker	
Last Action ...		Effective Date	02/01/2013		

Summary	General	Admission	Special Programs	Delinquency	
# Family Members	7	# of Dependents	5	Medical Threshold	0.00
Asset Cash Value	0.00	Asset Income	0.00	Elderly/Disabled Allowance	0.00
Annual Income	46,048.00	Excluded Income	0.00	Dependent Allowance	3,750.00
Disability Expense	0.00	Excluded Disability	0.00	Estimated TTP	1,058.00
Medical Expense	0.00	Excluded Medical	0.00	40% of AMI for HCV Max R...	1,410.00
Child Care Expense	0.00	Excluded Childcare	0.00	Tenant Rent	1,058.00
FSS Page		FSS Escrow Balance		Housing Assistance Payment	202.00
Family Verifications	3	Outstanding Verifications	3		
Community Service	Not Applicable	Comm Serv Last reviewed	Not Applica...		
Voucher	Attached	EID Status	Not Used		
Portability	Not Used				
Vo/RFTA Tracking					
Work Requirement	In-Progress				

**Functions**

[Clear All Verifications](#)

[Issue Offer](#)

[Update Vo/RFTA Status](#)

**Data**

[Attachment](#)

[Contact](#)

[Memo](#)

[Unit PHA Program Info](#)

[Inspection](#)

[Rent Hardship](#)

[Referral Tracking](#)

**Reports**

[Third Party Pymts](#)

[Calc Summary](#)

[Voucher HAP Contract](#)

[Voucher](#)

[Lease Amendment](#)

[Req. Tenancy Approval](#)

[Briefing Packet](#)

[Utility Chart](#)

[Review Memos](#)

[Portability Payment Schedule](#)

[Resident Subsidy Schedule](#)

## PROCESSING TENANT PAYMENT AGREEMENTS

The **New 50058** screen displays.

**New 50058**

Program: VO-Voucher

Type of Action: 2-Annual

Effective Date: 02/01/2013

Previous 50058s: ( 2 ) 02/01/2013 Ctrl#6639

**You must select a Previous 50058 because verifications are Old and/or Incomplete.**

50058 History (Last 10 50058s)			
Action Type	Effective Date	Approved Date	User Approved
2-Annual	02/01/2013	09/30/2013	klove

- Type or select an **EFFECTIVE DATE**, select a **PREVIOUS 50058** from the drop-down list, and click **SUBMIT**. The **FAMILY INFO** screen displays without Alerts and without the yellow error section at the top of the screen.

INSERT SCREEN SHOT OF SCREEN WITHOUT ALERTS

- On the **FAMILY INFO** screen, click the **APPROVE 50058** option, and click **SAVE**.

INSERT SCREEN SHOT WITH THE APPROVE 50058 BUTTON

## PROCESSING TENANT PAYMENT AGREEMENTS

7. Click **RESIDENT SUBSIDY SCHEDULE** to see how Voyager took back the entire amount.

50058 #	Unit	Current Vendor	Action Type	Correction	FSS	Date Approved	Effective Date	Date Lease End	Date Last Post	TR	URP	HAP	PAF	FSS
6639	38807	v0204209	2-Annual			07/29/13	02/01/13		12/01/13	-	0.00	784.00	-	-
22702	38807	v0204209	2-Annual	(1)		09/30/13	02/01/13			-	0.00	766.00	-	-

Subsidy Schedule														
Type	Status	Period From	Period To	50058 #	Abate #	HAP Payee	TR	URP	HAP	PAF	FSS			
RETRO	Approved	02/01/13	02/28/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	-784.00	0.00	0.00			
SCHDAMT	Prev Paid	02/01/13	02/28/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	784.00	0.00	0.00			
SCHDAMT	Approved	02/01/13	02/28/13	22702		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	766.00	0.00	0.00			
RETRO	Approved	03/01/13	03/31/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	-784.00	0.00	0.00			
SCHDAMT	Prev Paid	03/01/13	03/31/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	784.00	0.00	0.00			
SCHDAMT	Approved	03/01/13	03/31/13	22702		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	766.00	0.00	0.00			
RETRO	Approved	04/01/13	04/30/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	-784.00	0.00	0.00			
SCHDAMT	Prev Paid	04/01/13	04/30/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	784.00	0.00	0.00			
SCHDAMT	Approved	04/01/13	04/30/13	22702		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	766.00	0.00	0.00			
RETRO	Approved	05/01/13	05/31/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	-784.00	0.00	0.00			
SCHDAMT	Prev Paid	05/01/13	05/31/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	784.00	0.00	0.00			
SCHDAMT	Approved	05/01/13	05/31/13	22702		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	766.00	0.00	0.00			
RETRO	Approved	06/01/13	06/30/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	-784.00	0.00	0.00			
SCHDAMT	Prev Paid	06/01/13	06/30/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	784.00	0.00	0.00			
SCHDAMT	Approved	06/01/13	06/30/13	22702		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	766.00	0.00	0.00			
RETRO	Approved	07/01/13	07/31/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	-784.00	0.00	0.00			
SCHDAMT	Prev Paid	07/01/13	07/31/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	784.00	0.00	0.00			
SCHDAMT	Approved	07/01/13	07/31/13	22702		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	766.00	0.00	0.00			
SCHDAMT	Posted	08/01/13	08/31/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	784.00	0.00	0.00			
RETRO	Approved	08/01/13	08/31/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	-784.00	0.00	0.00			
SCHDAMT	Approved	08/01/13	08/31/13	22702		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	766.00	0.00	0.00			
SCHDAMT	Posted	09/01/13	09/30/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	784.00	0.00	0.00			
RETRO	Approved	09/01/13	09/30/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	-784.00	0.00	0.00			
SCHDAMT	Approved	09/01/13	09/30/13	22702		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	766.00	0.00	0.00			
SCHDAMT	Posted	10/01/13	10/31/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	784.00	0.00	0.00			
RETRO	Approved	10/01/13	10/31/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	-784.00	0.00	0.00			
SCHDAMT	Approved	10/01/13	10/31/13	22702		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	766.00	0.00	0.00			
SCHDAMT	Posted	11/01/13	11/30/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	784.00	0.00	0.00			
RETRO	Approved	11/01/13	11/30/13	6639		NAKOREYA NARIE LLC (v0204209)	0.00	0.00	-784.00	0.00	0.00			

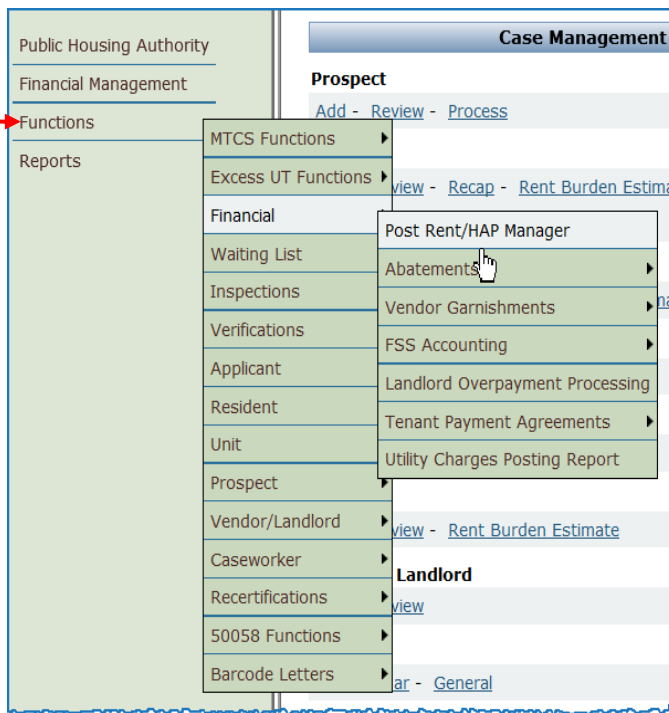
## PROCESSING TENANT PAYMENT AGREEMENTS

### CANCEL CREDIT TO LANDLORD

The Financial Analyst performs this task. The landlord adjustment (credit) must be canceled before you can create a charge for the tenant.

#### To cancel a credit to a landlord:

1. From the **HOUSING AUTHORITY** side menu, navigate to **FUNCTIONS > FINANCIAL > POST RENT/HAP MANAGER**. The **POST RENT/HAP MANAGER** screen displays.



## PROCESSING TENANT PAYMENT AGREEMENTS

2. Use the following information to complete the fields on the **POST RENT/HAP MANAGER** screen.

<b>PROP/LIST</b>	Required field. Enter the property or property list code.
<b>PRH MO</b>	Required field. In mm/yyyy format, enter the month in which you added the 50058 records.
<b>POST MO</b>	Enter the month the transaction posted.
<b>PROGRAM</b>	Select the type of subsidized program the Tenant belongs to, for example, voucher.
<b>OT PROG</b>	Select or type the special housing program.
<b>TENANT</b>	Select or type the Tenant who is making the repayment (family's resident code).
<b>LANDLORD</b>	Select the unit owner (landlord) of the Tenant who is making the repayment.
<b>ORDER BY</b>	Select the order in which the transactions display. The Options are: <b>TENANT:</b> Order by the resident's last name. <b>PAYEE:</b> Order by the authorized person who accepts the payment (typically the unit owner). <b>ACTION:</b> Order by 50058 action type. <b>FM DATE:</b> Order by the beginning date. NOTE: Voyager displays the transactions from this date forward. <b>TRAN TYPE:</b> Order by the type of transaction. <b>AMOUNT:</b> Order by the transaction dollar amount. <b>APPR AMT:</b> Order by the dollar amount of approved transactions.
<b>ONLY</b>	Select this option for post transactions only for the month that you specified in the <b>POST MO</b> field.

3. Click **REFRESH**. A summary displays.

## PROCESSING TENANT PAYMENT AGREEMENTS

4. Click **LOCK**.
5. In the Approval column, change the status of all lines for the affected months that will change the amount paid to the landlord (invoices and credits) from **APPROVED** to **CANCELED**.  
**NOTE:** Once invoices are canceled, the remaining balance is zero.
6. Click **SAVE DETAIL**.
7. Click **UNLOCK**.
8. Click **REFRESH**. Nothing should display, so all of the credits are canceled.

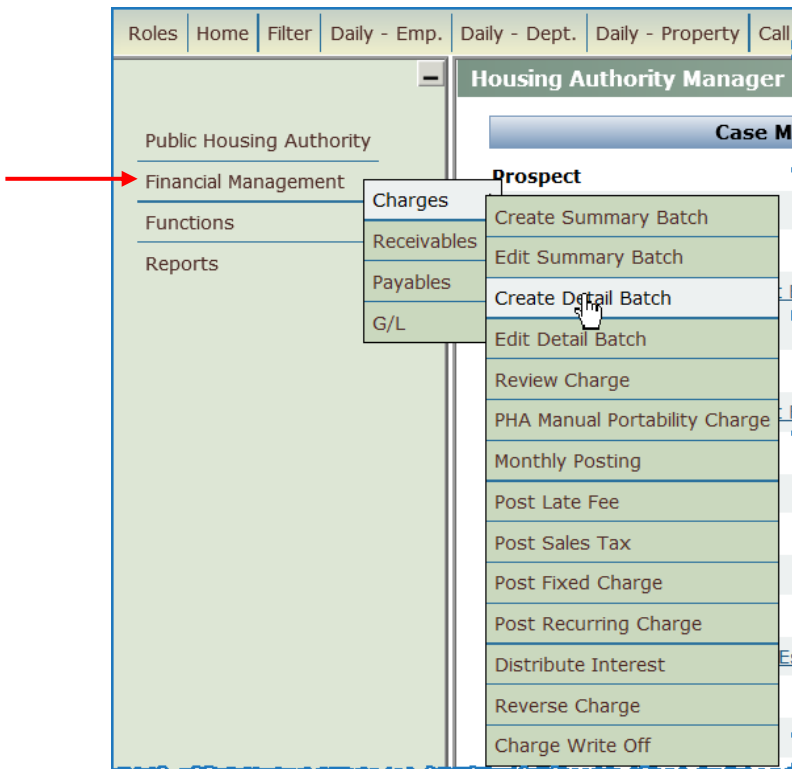
## PROCESSING TENANT PAYMENT AGREEMENTS

### CREATE TENANT CHARGE

The Financial Analyst creates the tenant charge, which cancels the credit to the Landlord.

To create a tenant charge:

1. From the Housing Authority side menu, navigate to **FINANCIAL MANAGEMENT>CHARGES>CREATE DETAIL BATCH**. The **BATCH CHARGE** screen displays.





## PROCESSING TENANT PAYMENT AGREEMENTS

2. Use the following information to complete the necessary fields on the **BATCH CHARGE** screen.

**Batch Charge**

Batch Description: axk-kenn 08/09/2013 1:

Batch Notes:

Total of Charges: 500.00

Number of Charges: 1

Fields highlighted in blue are required fields. The system does not allow you to advance to the next screen if you leave any of the required fields empty.

<b>BATCH DESCRIPTION</b>	The system populates this field with your user name, today's date, and current time (klove 08/21/2013 13:09).
<b>BATCH NOTES</b>	Optional field. Type pertinent information.
<b>TOTAL OF CHARGES</b>	Type the total dollar amount of the charge.
<b>NUMBER OF CHARGES</b>	Type the number of different charges to be created. For example, if you want to set up separate charges for Jan and Feb rent, enter 2.

3. Click **SUBMIT**. The **CHARGE** screen displays.

Roles Home Filter Daily - Emp. Daily - Dept. Daily - Property Call Center Information Dashboard Help Sign Out

**Charge**

Property:

Unit:

Charge To: t1091376

Charge Code: hap

Amount: 500

Tax: None

Account:

A/R Account:

Charge Date: 08/21/2013

Post Month: 07/2013

Hold:

Ctrl (New) Unposted Batch 45

Status: **Unpaid**

Reference:

Category:

Notes:

**Amount Date Check# Notes Rec**

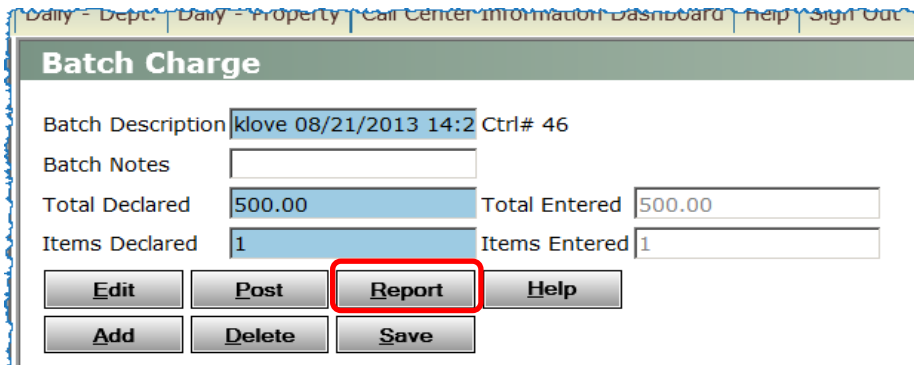
You can click field names that are blue and underlined to select from a pre-defined list.

## PROCESSING TENANT PAYMENT AGREEMENTS

4. Complete the following fields on the **CHARGE** screen.

<b>PROPERTY</b>	Type or select the property code.
<b>UNIT</b>	Type or select the unit of the tenant.
<b>CHARGE TO</b>	Type or select the tenant number, their T Code (t1031458).
<b>CHARGE CODE</b>	Enter hap. The hap charge code is tied to TPA and GL accounts. Do not fill in account numbers. The system populates based on the charge code.
<b>AMOUNT</b>	Type the total dollar amount that the tenant must pay.
<b>TAX</b>	Select None if??? Select To Be Posted if ??? Select Posted if???
<b>ACCOUNT</b>	Need Description
<b>A/R ACCOUNT</b>	Type or select the Accounts Receivable account that ????
<b>CHARGE DATE</b>	The system automatically populates with today's date. VERIFY
<b>POST MONTH</b>	The system automatically populates with the current month. VERIFY
<b>HOLD</b>	Select this option if ????????
<b>STATUS</b>	The system automatically sets the status to Unpaid until ????
<b>REFERENCE</b>	Need Description
<b>CATEGORY</b>	Need Description
<b>NOTES</b>	Add any content pertaining to the charge here.

5. Click **SAVE**. The **BATCH CHARGE** screen displays again with additional options.



Batch Charge

Batch Description: klove 08/21/2013 14:2 Ctrl# 46

Batch Notes:

Total Declared: 500.00 Total Entered: 500.00

Items Declared: 1 Items Entered: 1

Buttons: Edit, Post, Report, Help, Add, Delete, Save

6. Click **REPORT**. The system generates an Unposted Charge Batch report. Review the report. If everything appears correct, go to the next step. If you need to make changes, click **EDIT** and correct.  
**NOTE:** The system does not allow you to post until you review the report.

## PROCESSING TENANT PAYMENT AGREEMENTS

Unposted Charge Batch													<input type="button" value="Excel"/>
Total Declared: 500.00													
Total Entered: 500.00													
Batch #46													
Tran#	Property	Unit	Tenant	Name	Status	A/R Acct	Inc. Acct	Date	Period	Charge Code	Description	Charge	Remarks
C-553	vo_mtw	00000004	t1091376	Hollywood	Current	1129-00-000	4715-00-000	08/21/2013	07/2013	hap	Housing Assitance Payment	500.00	
												<b>500.00</b>	

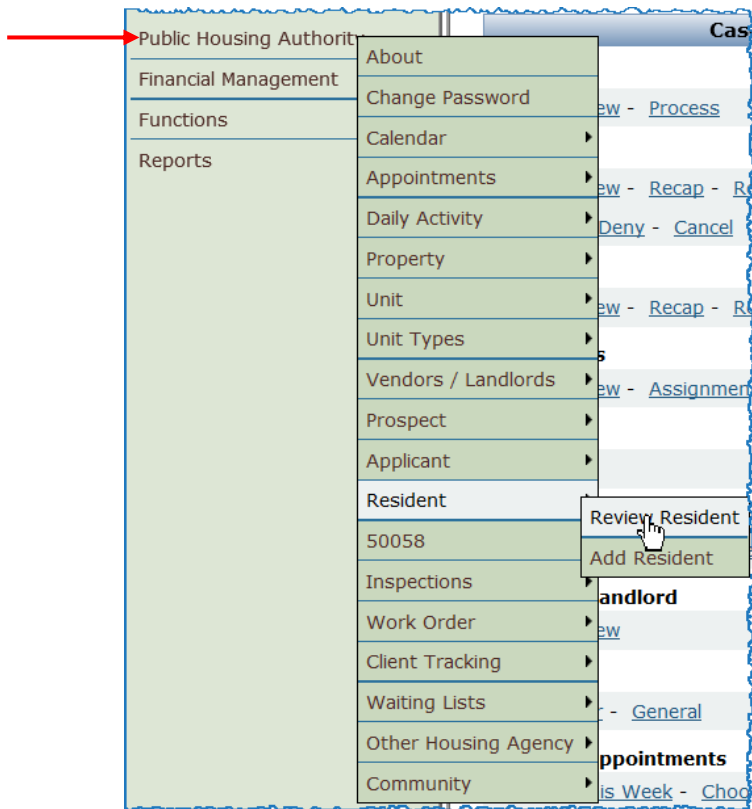
7. Close the report. When the **BATCH CHARGE** screen displays again, click **POST** to post the charge to the GL. A confirmation message displays.
8. Click **OK** on the confirmation message. A message displays stating that your batch successfully posted.

## PROCESSING TENANT PAYMENT AGREEMENTS

### REVIEW TENANT LEDGER

To review the tenant ledger:

1. From the side menu, navigate to **PUBLIC HOUSING AUTHORITY>RESIDENT>REVIEW RESIDENT**. The **RESIDENT** screen displays.



## PROCESSING TENANT PAYMENT AGREEMENTS

- On the **RESIDENT** screen, click **RESIDENT** to display a list of t codes from which you can select the tenant. Click Submit.

The screenshot shows the Yardi Voyager web interface. The top navigation bar includes 'Roles', 'Home', 'Filter', 'Daily - Emp.', 'Daily - Dept.', 'Daily - Property', 'Call Center Information Dashboard', 'Help', and 'Sign Out'. The main header displays 'Yardi Voyager' and 'UAT'. On the left, a sidebar menu lists 'Public Housing Authority', 'Financial Management', 'Functions', and 'Reports'. The central area is titled 'Resident' and contains several input fields: 'Property', 'Unit', 'Last Name', 'Telephone Nos.', 'Status', 'Lease Expires', 'Notes', and 'Display Rows' (set to 5000). Below these fields are 'Submit', 'Clear', and 'Help' buttons. A modal window is open, displaying a table of t codes and descriptions. A dropdown menu is open over the 'Find' button, listing options: 'Current', 'Past', 'Future', 'Evict', 'Notes', 'Vacant', 'Applicant', 'Canceled', 'Wait List', and 'Denied'.

Code	Description
<input type="checkbox"/> t0000010	John O. Chiles, Sprint Nextel (ahachile, AR, Current) ( , )
<input type="checkbox"/> t0000011	John O. Chiles, T-Mobile (ahachile, AR, Current) ( , )
<input type="checkbox"/> t0000012	John O. Chiles, Verizon Wireless (ahachile, AR, Current) ( , )
<input type="checkbox"/> t0000013	John O. Chiles, Metro PCS (ahachile, AR, Current) ( , )
<input type="checkbox"/> t0000002	Cosby Spear A, Sprint Nextel (ahacosby, AR, Current) ( , )
<input type="checkbox"/> t0000003	Cosby Spear B, AT&T (ahacosby, AR, Current) ( , )
<input type="checkbox"/> t0000004	Cosby Spear A, Verizon Wireless (ahacosby, AR, Current) ( , )
<input type="checkbox"/> t0000015	Cosby Spear A, T-Mobile (ahacosby, AR, Current) (Miscellaneous Accounts Receivable , )
<input type="checkbox"/> t0000001	Piedmont Rd., Verizon Wireless (ahapiedm, AR, Current) (Miscellaneous Accounts Receivable , )
<input type="checkbox"/> t0000009	Piedmont Rd., Sprint Nextel (ahapiedm, AR, Current) (Miscellaneous Accounts Receivable , )
<input type="checkbox"/> t0000016	Piedmont Rd., AT&T (ahapiedm, AR, Current) (Miscellaneous Accounts Receivable , )
<input type="checkbox"/> t0001585	Hall, Kimberly (mtw_hcv, DPA_037, Current) ( Atlanta, GA )

## PROCESSING TENANT PAYMENT AGREEMENTS

The **RESIDENT** screen for the tenant you selected displays.

Roles		Home		Filter		Daily - Emp.		Daily - Dept.		Daily - Property		Call Center Information Dashboard		Help		Sign Out																																																																													
<b>Resident</b>																																																																																													
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## PROCESSING TENANT PAYMENT AGREEMENTS

3. Scroll to the bottom of the **RESIDENT** screen. Locate the **REPORTS** section on the lower-left of the screen.

The screenshot shows a web application interface for managing tenants. The top navigation bar includes links for Roles, Home, Filter, Daily - Emp., Daily - Dept., Daily - Property, Call Center Information Dashboard, Help, and Sign Out. The main content area is divided into several sections:


- Resident:** A sidebar on the left showing a search result for '405 (C) - Spight, Jason'.
- Lease Information:** A grid of input fields for lease details such as Mkt. Rent, Rent, Due Day, Move In, Lease Sign, Lease From, Lease To, Last Renewal, Other Charges, Total Charges, Notice, Move Out, Lease Desc, and Responsibility Date.
- Late Fees:** A grid of input fields for late fee settings including Base %, Grace Period, 2nd %, 2nd Grace, Max %, \$/day, Max # Days, and Minimum Due.
- Contact:** A vertical sidebar on the right containing a list of links for various services and reports. The 'Reports' link is highlighted with a red border.

4. Click **LEDGER**.

This close-up view shows the 'Reports' section of the sidebar. The 'Reports' link is highlighted in a dark brown box, and the 'Ledger' link directly below it is highlighted with a red box. Other links in the list include GA Bureau of Investigation, Atlanta Police Department, Atlanta Scholar Award, Unpaid Charges, Pending Payments, Payables Register, and Repayment Agreement.

## PROCESSING TENANT PAYMENT AGREEMENTS

The **RESIDENT LEDGER** displays.



Date : 9/6/2013

### Resident Ledger

Date	Description	Charge	Payment	Balance	Chg/ Rec
7/31/2013	:TPA Reclassification of charge 523	(250.00)		(250.00)	<a href="#">524</a>
7/31/2013	:TPA Reclassified Charge	250.00		0.00	<a href="#">525</a>
9/5/2013	Housing Assistance Payment	250.00		250.00	<a href="#">523</a>



## PROCESSING TENANT PAYMENT AGREEMENTS

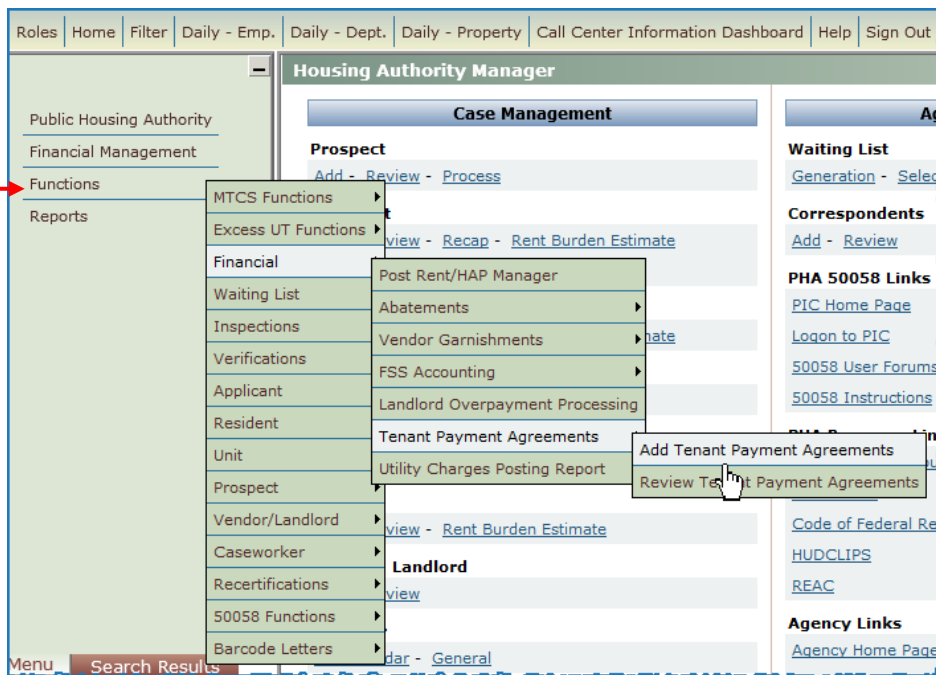
### CREATE TENANT PAYMENT AGREEMENT

The Compliance Manager generates a **LEASE CHARGES FOR REPAYMENT AGREEMENTS REPORT** and disperses it to the Compliance Analyst. The Compliance Analyst creates the Tenant Payment Agreement. When you create the TPA, you must specify:

- The date up to which outstanding charges are included in the agreement
- The posting month that the TPA begins
- Either the monthly payment amount or the number of payments

#### To create a Tenant Payment Agreement:

1. From the **HOUSING AUTHORITY MANAGER** screen, navigate to **FUNCTIONS > FINANCIAL > TENANT PAYMENT AGREEMENTS > ADD TENANT PAYMENT AGREEMENTS**.



## PROCESSING TENANT PAYMENT AGREEMENTS

The **TENANT PAYMENT AGREEMENT** screen displays.

The screenshot shows the 'Tenant Payment Agreement' screen with the following fields:

- Property**: [Empty blue field]
- Tenant**: [Empty blue field]
- Description**: [Empty text field]
- Open charges up until this date**: [Empty date field]
- Start month for new, rescheduled charges**: [Empty date field]
- # of months to repay the amt. rescheduled**: [Empty number field]
- OR Repay monthly amt.**: [Empty number field]
- Notes**: [Empty text area]

Buttons at the bottom: **Display**, **New**, **Help**

- Use the following information to help you complete the fields on the **TENANT PAYMENT AGREEMENT** screen. **NOTE:** Remember that the fields in blue are required fields.

The screenshot shows the 'Tenant Payment Agreement' screen with the following fields populated:

- Property**: mtw\_hcv
- Tenant**: t0001685
- Description**: TPA
- Open charges up until this date**: 09/05/2014
- Start month for new, rescheduled charges**: 09/2013
- # of months to repay the amt. rescheduled**: [Empty]
- OR Repay monthly amt.**: 100.00
- Notes**: Spoke with Tenant.

The **Display** button is highlighted with a red box. Other buttons: **New**, **Help**

**PROPERTY** Select or type the property code. Required field.

**TENANT** Select or type the resident code for whom you are setting up the TPA. Required field.

## PROCESSING TENANT PAYMENT AGREEMENTS

<b>DESCRIPTION</b>	Type content that differentiates this TPA from others.
<b>OPEN CHARGES UP UNTIL THIS DATE</b>	Select or type the stop date for collecting outstanding charges for this tenant, per the TPA. Required field.
<b>START MONTH FOR NEW, RESCHEDULED CHARGES</b>	Type the month and year that the payment agreement starts. Use mm/yyyy format. Required field.
<b># OF MONTHS TO REPAY THE AMT. RESCHEDULED</b>	Type the number of months that the TPA will last.
<b>OR REPAY MONTHLY AMT.</b>	Type the monthly amount the resident agreed to pay. Per HUD rules, Tenants cannot have more than 30% of their income towards a repayment.
<b>NOTES</b>	Provide comments about communication with the Tenant, meetings, emails, phone calls. Record historical information here that you can refer back to.

- Click **DISPLAY**. An **OUTSTANDING CHARGES SUMMARY** tab displays in the lower portion of the **TENANT PAYMENT AGREEMENT** screen.

The screenshot shows the 'Tenant Payment Agreement' screen. The top navigation bar includes 'Roles', 'Home', 'Filter', 'Daily - Emp.', 'Daily - Dept.', 'Daily - Property', 'Call Center Information Dashboard', 'Help', and 'Sign Out'. The left sidebar has 'Public Housing Authority', 'Financial Management', 'Functions', and 'Reports'. The main area shows the 'Tenant Payment Agreement' form with fields for Property (mtw\_hcv), Tenant (t0001685), Description (TPA), Open charges up until this date (09/05/2014), Start month for new, rescheduled charges (09/2013), # of months to repay the amt. rescheduled, and OR Repay monthly amt. (100.00). The Notes field contains 'Spoke with Tenant.'. Below the form are 'Display', 'New', and 'Help' buttons. The 'Outstanding Charges Summary' tab is active, showing a 'Post' button, a 'Select All' checkbox, and a table with the following data:

Sel	Repay Charge Code	Total Outstanding
<input checked="" type="checkbox"/>	tpa	2604.30

## PROCESSING TENANT PAYMENT AGREEMENTS

- Select the line item that you want to post, and click **POST**. In our example, the tenant has one charge, so we selected that line item.

Roles | Home | Filter | Daily - Emp. | Daily - Dept. | Daily - Property | Call Center Information Dashboard | Help | Sign Out

### Tenant Payment Agreement

Ctrl (new)

Property: mtw\_hcv MTW Housing Choice Funds (14.HCV)  
 Tenant: t0001685 Rosario, Sonia  
 Description: TPA  
 Open charges up until this date: 09/05/2014  
 Start month for new, rescheduled charges: 09/2013  
 # of months to repay the amt. rescheduled:   
 OR Repay monthly amt.: 100.00  
 Notes: Spoke with Tenant.

Display New Help

**Outstanding Charges Summary**

**Post**

Select All

Sel	Repay Charge Code	Total Outstanding
<input checked="" type="checkbox"/>	tpa	2604.30

The **PAYMENT AGREEMENT TRANSACTION RECAP** report displays with summary information about for the payment agreement you just added.

### Tenant Payment Agreement

Ctrl 1

Property: vo\_mtw Moving To Work  
 Tenant: t1091395 Legion, Kat  
 Description:   
 Open charges up until this date: 08/08/2013  
 Start month for new, rescheduled charges: 09/2013  
 # of months to repay the amt. rescheduled: 0  
 OR Repay monthly amt.: 100.00  
 Notes:   
 Display New Help

**Payment Agreement Summary**

Total amount	585.00
Total charged to tenant	100.00
Total received by tenant	100.00
Open balance amount	485.00

Reports: PA Schedule, Ledger, PA Contract

**Outstanding Charges Summary**

Cancel

Select All

Sel	Repay Charge Code	Total Outstanding
<input checked="" type="checkbox"/>	tpa	585.00

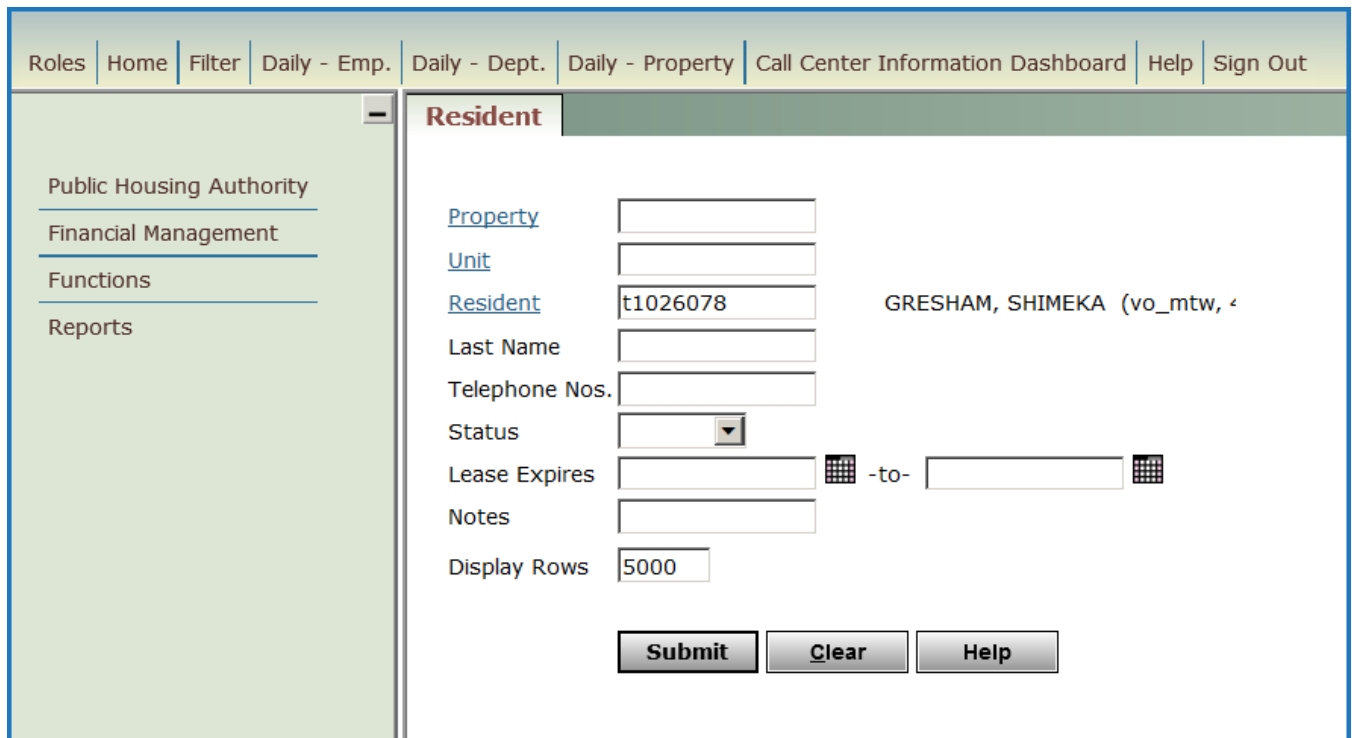
## PROCESSING TENANT PAYMENT AGREEMENTS

### MONITOR TENANT PAYMENT AGREEMENT

The Compliance Analyst monitors the TPA for the first 90 days. Finance monitors the TPA thereafter. To monitor the TPA, you review the Tenant Ledger for the tenant/resident or the tenant's TPA.

#### To monitor a Tenant Payment Agreement:

1. From the side menu, navigate to **PUBLIC HOUSING AUTHORITY > RESIDENT > REVIEW RESIDENT**. The **RESIDENT** screen displays.
2. On the **RESIDENT** screen, enter the Tenant number or name into the **RESIDENT** field, and click **SUBMIT**.



Roles | Home | Filter | Daily - Emp. | Daily - Dept. | Daily - Property | Call Center Information Dashboard | Help | Sign Out

**Resident**

Public Housing Authority  
Financial Management  
Functions  
Reports

Property

Unit

Resident  GRESHAM, SHIMEKA (vo\_mtw, <

Last Name

Telephone Nos.

Status

Lease Expires  -to-

Notes

Display Rows

**Submit** **Clear** **Help**

## PROCESSING TENANT PAYMENT AGREEMENTS

The Tenant's record (details) displays along with Quick Link menus on the right side.

<b>Resident</b> 40053 (C) - GRESHAM, SHIM	<b>Resident</b> First Name: SHIMEKA MI Last Name: GRESHAM Address: 2032 SANDLAKE DR SW City-St-Zip: ATLANTA GA 30331-8739 E-mail: Alt. E-mail: Office: Home: (404) 218-9915 FAX: Mobile:		<b>Property Info</b> Resident ID: t1026078 Property: vo_mtw Unit: 40053 Status: Current Legal: N/A Payment Method: Any Payable Method: EFT		<b>Functions</b> <a href="#">Renew Lease</a> <a href="#">Adjust Lease End</a> <a href="#">Month to month</a> <a href="#">Reverse Move In</a> <a href="#">Notice</a> <a href="#">Move Out Calculator</a> <a href="#">Evict</a> <a href="#">Assign Unit</a> <a href="#">Apply Deposit</a> <a href="#">Charge</a> <a href="#">Transfer To Property</a> <a href="#">Abatement</a> <a href="#">PRH Tenant Hold</a> <a href="#">Tenant Payment Agreement</a> <a href="#">Legal</a> <a href="#">Credit Check</a> <b>Data</b> <a href="#">Family Detail Info</a> <a href="#">Lease Charges</a> <a href="#">Waiting Lists</a> <a href="#">Inspection</a> <a href="#">URP Distribution</a> <a href="#">Roommates</a> <a href="#">Attachment</a> <a href="#">Memo</a> <a href="#">Contact</a> <a href="#">Email</a> <a href="#">EFT Setup</a> <a href="#">Credit Card Setup</a> <a href="#">Resident History</a> <a href="#">Manage Rentable Items</a> <a href="#">New WO</a>
	<input type="button" value="Save"/> <input type="button" value="New"/> <input type="button" value="Help"/>		<b>Lease Info</b>   <b>Deposit Info</b>   <b>Lease Charges</b>   <b>Other Info</b>		
	<b>Lease Information</b> Mkt. Rent: 0.00 Rent: 0.00 Due Day: 1 Other Charges: 0.00 Move In: 05/01/2009 Total Charges: 0.00 Lease Sign: Lease From: 05/01/2009 Move Out: 04/30/2010 Lease To: 04/30/2010 Lease Desc: Last Renewal: Responsibility Date:		<b>Late Fee</b> Base %: 0.00 % Owed-total: Grace Period: 6 2nd %: 0.00 % Owed-total: 2nd Grace: 0 Max %: 0.00 % Owed-total: \$/day: 0.00 Max # Days: 0 Minimum Due: 0.00		
	Subsidized <input checked="" type="checkbox"/>				
	<input type="button" value="Menu"/> Search Results				

3. Locate the **FUNCTIONS** Quick Link menu, and click the **TENANT PAYMENT AGREEMENT** link.



## PROCESSING TENANT PAYMENT AGREEMENTS

The **TENANT PAYMENT AGREEMENT** for that Tenant displays. It shows the amount the Tenant owes, the amount they are to repay monthly, and how much they paid so far.

**Payment Agreements**

☐ 11/01/2013 - GRESHA...

### Tenant Payment Agreement

Property: vo\_mtw Moving To Work

Tenant: t1026078 GRESHAM, SHIMEKA

Description:

Open charges up until this date: 11/01/2013

Start month for new, rescheduled charges: 10/2013

# of months to repay the amt. rescheduled: 0

OR Repay monthly amt.: 25.00

Notes:

**Ctrl 5**

Payment Agreement Summary	
Total amount	250.00
Total charged to tenant	0.00
Total received by tenant	0.00
Open balance amount	250.00

**Reports**

[PA Schedule](#)

[Ledger](#)

[PA Contract](#)

Display
New
Help

**Outstanding Charges Summary**

Select All

Sel	Repay Charge Code	Total Outstanding
<input checked="" type="checkbox"/>	tpa	250.00

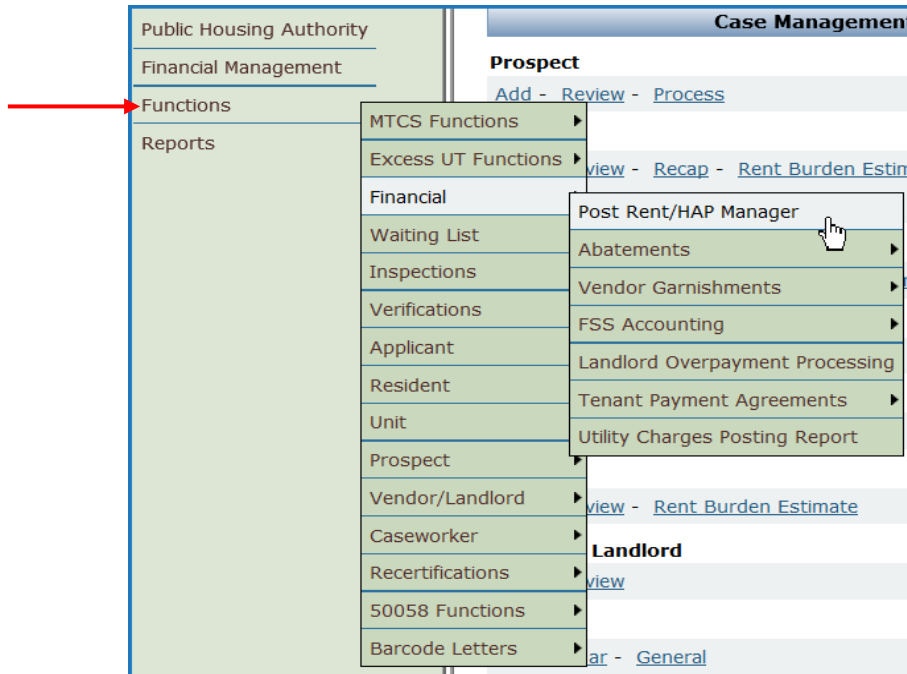
## PROCESSING TENANT PAYMENT AGREEMENTS

### RUN THE POST RENT/HAP

The CSG Administrator runs the Post Rent/HAP.

To run the Post Rent and HAP:

1. From the **HOUSING AUTHORITY MANAGER** main screen, navigate to **FUNCTIONS>FINANCIAL>POST RENT/HAP**.



The **POST RENT/HAP MANAGER** screen displays.

Approved Totals		Pending Totals		Tuesday, October 01, 2013	
Item	Amount	Count	Item	Pending Amt	Count
Rent Charges (Rent)	\$0.00	0	Rent Charges (Rent)	\$0.00	0
HAPs (HAP)	\$0.00	0	HAPs (HAP)	\$0.00	0
URPs (URP)	\$0.00	0	URPs (URP)	\$0.00	0
PI HAP & URP (Port)	\$0.00	0	Port In Charges (Port)	\$0.00	0
PI Admin Fee (PAF)	\$0.00	0	Port In Admin Fee (PAF)	\$0.00	0
PO HAPs (POH)	\$0.00	0	PO HAPs (POH)	\$0.00	0
PO Admin Fee (POA)	\$0.00	0	PO Admin Fee (POA)	\$0.00	0
PO Hard To House Fee (HTH)	\$0.00	0	PO Hard To House Fee (HTH)	\$0.00	0
PO Other Amt (OTF)	\$0.00	0	PO Other Amt (OTF)	\$0.00	0
FSS Escrow (FSS)	\$0.00	0	FSS Escrow (FSS)	\$0.00	0
Abates	\$0.00	0	Abates	\$0.00	0
Payment Agreements	\$0.00	0	Payment Agreements	\$0.00	0
			PRH Holds	\$0.00	0
			Ten/Ven Holds	\$0.00	0

Prop/List		Only	<input type="checkbox"/>	Lock
PRH Mo		All		Refresh
Post Mo		Rent		Help
Program		HAP		Reports
Ot Prog		URP		Audit
Tenant		Port		Edit
Landlord		FSS		
Order By	Tenant	POH		
	Asc	POA		
		HTH		
		OTF		
		TPA		

Search  Ten Code  Find

2. Complete these fields: **PROP/LIST** and **PRH MO**. Click **REFRESH**.
3. Click **LOCK**.



## PROCESSING TENANT PAYMENT AGREEMENTS

4. Click **Post**. This process takes four to five minutes to complete. When it is complete, a message appears at the bottom that says **POSTING COMPLETE**.

Posting Complete
Posting Date: 12/01/2013
Transaction Types: TRC^HAP^URP^PAF^FSS^POH^POA^HTH^OTF^TPA
Process Date: Sep 27 2013 2:52PM
Process Group Description: Ctrl #14 - PRH Group for TRC^HAP^URP^PAF^FSS^POH^POA^HTH^OTF^TPA on: 9/27/2013 at: 2:52:54 PM
Housing Assistance Payments Total: \$784.00 Count: 1 Batch: 1431
Payment Agreement Total: 784.00 Count: 1 Batch: 47