

Completing an Intake Certification or Annual Recertification

The intake certification gives you the opportunity to demonstrate your eligibility for housing assistance. The annual recertification gives you the opportunity to demonstrate your continued eligibility for housing assistance. On both certifications, you will provide information about your household, and then upload supporting documentation to verify that information.

In RENTCafé PHA, the default workflows for the two certifications are nearly identical. There is, however, one key difference. Annual recertifications pre-populate with household information from your last certification. Intake certifications do not pull in any pre-existing household information.



This procedure shows the default intake/recertification workflow in RENTCafé PHA. The workflow that your PHA uses may vary from this default.

To complete an Intake Certification or Annual Recertification



You must begin this procedure from the **RENTCafé Dashboard**. Your **RENTCafé Dashboard** will look similar (but not necessarily exactly like) “**Example RENTCafé dashboard.**”

Example RENTCafé dashboard

Compliance ▾

Logged in as: Mary Stewart - 2011 11th St. W.

Certifications **Basic Information** **Family Information** **Inspections**

My Verifications **Housing Assistance Payments** **Holds and Abatements** **Attachments**

PHA Custom Page **Contact Us**

QUICK LINKS

I want to:
Update My Contact Details ▾
Go

SMS ALERTS

Receive important alerts and information via text!
Mobile Phone Number:
(888) 555-2222
Opt In **No Thanks**
Standard messaging rates apply. [Click here for details.](#)

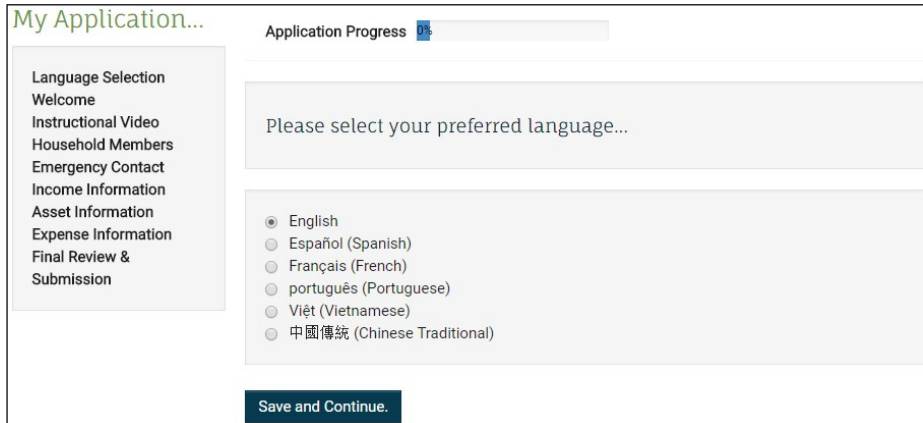
1 Click **Certifications**.



2 One of two screens will appear.

- If you have not started your intake certification or annual recertification, the first step of the certification workflow will appear (see “**Example First Workflow Step**” on page 231).
 - a If this is the case, you may immediately skip to **Step Three** of this procedure.

Example First Workflow Step



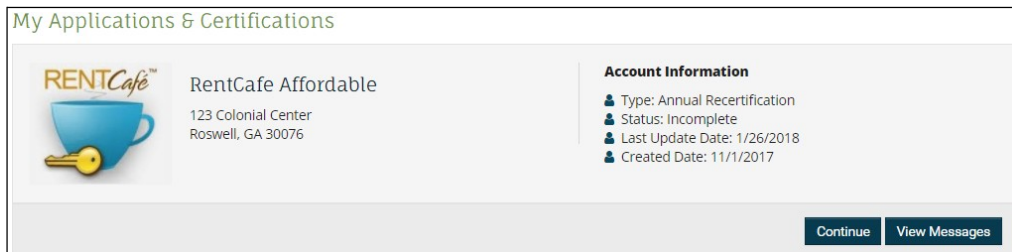
The screenshot shows a web interface titled "My Application...". At the top right, there is a progress bar labeled "Application Progress" with a blue indicator and "0%". On the left side, there is a vertical navigation menu with the following items: Language Selection, Welcome, Instructional Video, Household Members, Emergency Contact, Income Information, Asset Information, Expense Information, Final Review & Submission. The main content area has a heading "Please select your preferred language..." followed by a list of radio button options: English (selected), Español (Spanish), Français (French), português (Portuguese), Việt (Vietnamese), and 中國傳統 (Chinese Traditional). At the bottom of the main area is a blue button labeled "Save and Continue."

- If you have already started your intake certification or annual recertification, the **My Applications & Certifications** screen will appear (see “**Example My Applications & Certifications screen**” on page 231.)
 - b If this is this case, click **Continue**. The last workflow step you were on appears.



This procedure will continue as if you were last on the **Step One** of the workflow.

Example My Applications & Certifications screen



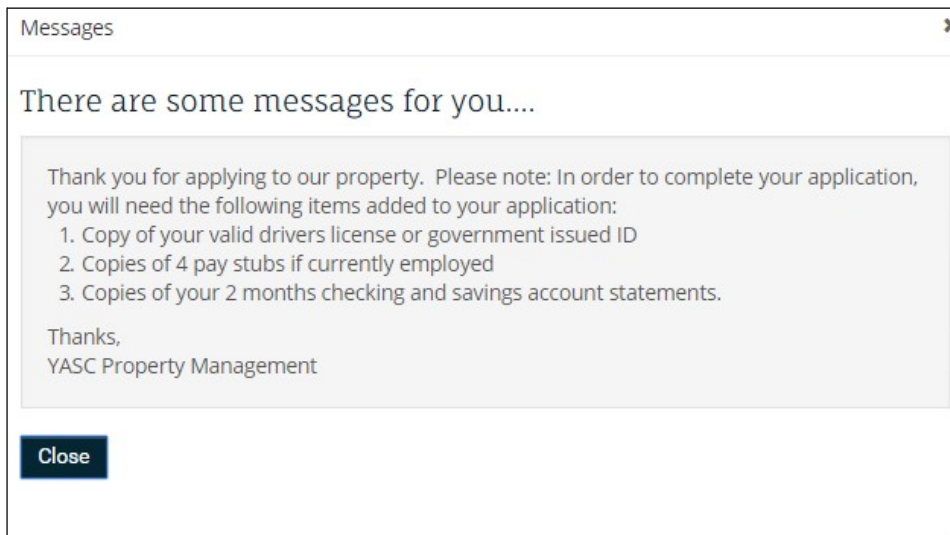
The screenshot shows a web interface titled "My Applications & Certifications". On the left, there is a logo for "RENTCafe" featuring a blue cup and a yellow key. Next to it, the text reads "RentCafe Affordable", "123 Colonial Center", and "Roswell, GA 30076". On the right, under the heading "Account Information", there is a list of details: Type: Annual Recertification, Status: Incomplete, Last Update Date: 1/26/2018, and Created Date: 11/1/2017. At the bottom right, there are two blue buttons: "Continue" and "View Messages".



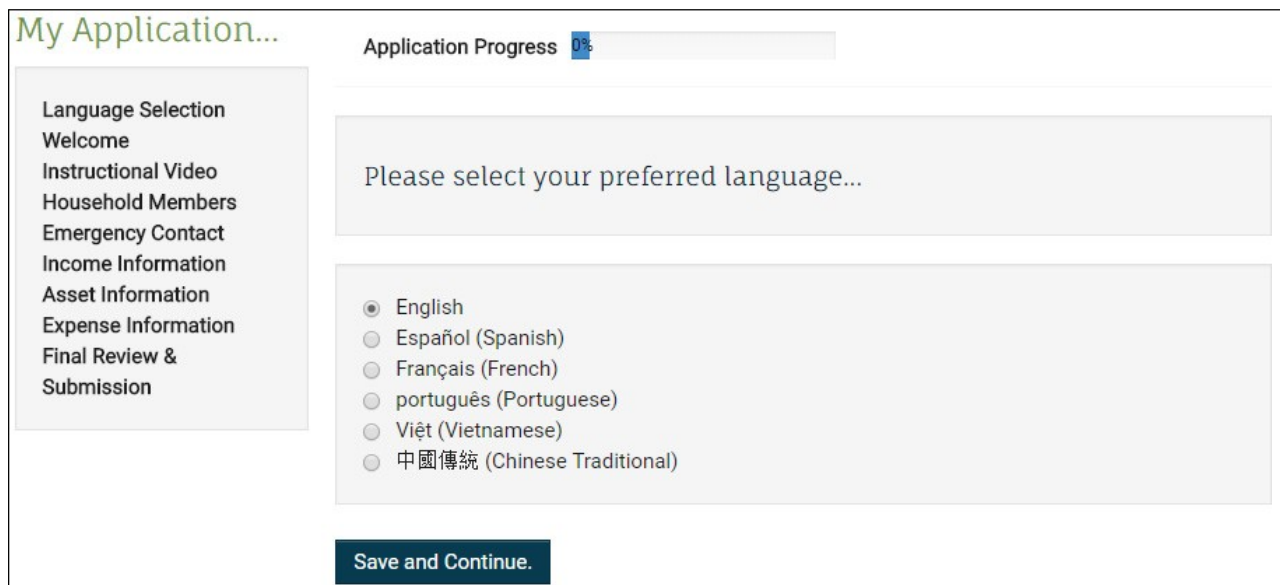
The **My Applications & Certifications** screen displays all in-progress and initiated online applications and compliance certifications associated with an applicant/resident. In this example, the user has started the annual recertification, but not yet completed it. This means that the certification has a status of “Incomplete.”

If a Site Manager user has added notes to a certification and marked them as **Allow Applicant to see this note**, the **View Messages** button appears on the **My Applications & Certifications** screen. See “Adding Notes” in Chapter 4, “Compliance Certification Management.” Clicking the **View Messages** button brings up the **Messages** screen (see “**Example Messages screen**” on page 232), which displays the text of the notes to the applicant/resident.

Example Messages screen



3 Click the button next to your preferred language for the workflow.



4 Click **Save and Continue**. The **Household Members** step appears.

5 Click Add Household Member.



If the you are working on a recertification, existing household member information will be pulled from Voyager. You will only have to input changes to household member information.

Application Progress **9%**

Let's look at household member information...

The household members we have on file are listed below.

Click **Review and Confirm** to review each family and provide updates, if needed.
Click **Add Household Member** to report new members who will be living in your home.

Add Household Member

6 Complete the household member details fields and then click Save.

Tell Us About Household Members

Member Details

| | |
|--|--------------------------|
| First Name* | MARY |
| Middle Name | B |
| No Middle Name | <input type="checkbox"/> |
| Last Name* | STEWART |
| Date of Birth* | <input type="text"/> |
| Social Security Number* | <input type="text"/> |
| Gender* | Female ▼ |
| Relationship to the Head of Household* | Head of Household ▼ |
| Citizenship Status* | Eligible Citizen ▼ |

- 7 Once you have added household member information, you can review and edit it. When finished, click **I have finished this step. I am ready to continue.** The **Emergency Contact** step appears.

Application Progress **5%**

Let's look at household member information...

The household members we have on file are listed below.

Click **Review and Confirm** to review each family and provide updates, if needed.
Click **Add Household Member** to report new members who will be living in your home.

Add Household Member

Search:

| First Name | Last Name | Date of Birth | Relationship | Age | Gender | | |
|------------|-----------|---------------|-------------------|-----|--------|-------------|---------------|
| MARY | STEWART | | Head of Household | 37 | Female | Edit | Delete |
| David | Stewart | | Youth<18 | 17 | Male | Edit | Delete |
| Gary | Stewart | | Spouse | 35 | Male | Edit | Delete |

Showing 1 to 3 of 3 entries

Go Back. **I have finished this step. I am ready to continue.**

- 8 Click **Add Emergency Contact.**



If the you are working on a recertification, existing emergency contact information will be pulled from Voyager. You will only have input changes to emergency contact information.

Application Progress **18%**

Emergency Contact

Optional Contact Person or Organization: As part of your application for housing, you have the right by law to include the name, address, telephone number, and other relevant information for a family member, a friend, or an organization that offers social, health, advocacy, or other support services. This contact information is for the purpose of identifying a person or organization that may be able to help in resolving issues that may arise during your tenancy or to assist in providing needed special care or services. **You may update, remove, or change the information that you provide on this form at any time.** You are not required to provide this contact information.

Add Emergency Contact

9 Complete the emergency contact details fields, and then click **Save**.

The screenshot shows a form titled "Your Emergency Contact Information" with a close button in the top right corner. The form contains the following fields:

- Name:** Maureen Kerrigan
- Relationship:** Friend (dropdown menu)
- Phone:** (555) 666-8888
- Cell Phone:** (empty field)
- Address 1:** 6226 Utah St.

10 After adding information about the emergency contact, you can review and edit it. When finished, click **I have finished this step. I am ready to continue**. The **Household Income** step appears.

The screenshot shows the "Emergency Contact" review screen. At the top, there is an "Application Progress" bar at 18%. Below the title "Emergency Contact", there is a paragraph of text explaining the optional contact person or organization. Below the text is a search bar and a table of the added contact information.

Optional Contact Person or Organization: As part of your application for housing, you have the right by law to include the name, address, telephone number, and other relevant information for a family member, a friend, or an organization that offers social, health, advocacy, or other support services. This contact information is for the purpose of identifying a person or organization that may be able to help in resolving issues that may arise during your tenancy or to assist in providing needed special care or services. **You may update, remove, or change the information that you provide on this form at any time.** You are not required to provide this contact information.

Search:

| Name | Relationship | Phone | | |
|------------------|--------------|----------------|----------------------|------------------------|
| Maureen Kerrigan | Friend | (555) 555-8888 | Edit | Delete |

Showing 1 to 1 of 1 entries

[Go Back.](#) [I have finished this step. I am ready to continue.](#)

11 Click **Add Income**.



If you are working on a recertification, existing income information will be pulled from Voyager. You will only have input changes to income information.

Application Progress 27%

Let's look at income information...

We have the following income information on file.

Click **Review and Confirm** to review each income item and provide updates, if needed.
Click **Add Income** to report new income information.

Add Income

12 Complete the income source details fields, and then click **Save**.

Tell Us About Income Information

Income Details | Income Type Definitions

| | |
|---|----------------------|
| Who receives this income?* | MARY STEWART ▾ |
| What type of income is this? Click Here for income type definitions. | Social Security ▾ |
| How often is this income received?* | Annually ▾ |
| How much does this person receive for each income payment?* | \$16,608.00 |
| Additional Information | <input type="text"/> |

Save **Cancel**

- If you have trouble determining how to fill out the **What type of income is this?** field, you can click **Income Type Definitions**. The **Income Type Definitions** tab appears.

The Income Type Definitions tab

| Income Details | Income Type Definitions |
|--|--|
| Back to Income details | |
| Employment | Wages and salary received from private or public sources (other than military pay and federal wages), both full-time and part-time employment. Note: Include overtime, tips, bonuses, commissions, shift differential, and any payments received in cash. |
| Self Employment | Net income from a professional or business operation. |
| Tips-Overtime-Bonuses | All overtime, bonuses, tips, or commissions for everyone who will be living in your household. Note: Include income received from full-time and part-time employment. |
| PHA Wage | Compensation earned from work performed for the Public Housing Agency (PHA). |
| Federal Wage | Compensation received from federal government employment, including federal government agencies and instrumentalities. |
| Social Security | Benefits from the Social Security Administration. Includes: |

13 After adding information about income, you can review and edit that information. When you are finished, click **I have finished this step. I am ready to continue**. The **Add Assets** step appears.

Application Progress 27%

Let's look at income information...

We have the following income information on file.

Click **Review and Confirm** to review each income item and provide updates, if needed.
Click **Add Income** to report new income information.

Add Income

Search:

| Name | Income Source | Annual Earnings | | |
|--------------|---|-----------------|----------------------|-----------------------------|
| MARY STEWART | Gifts/Contributions - Money from Mom to pay bills | \$0.00 | Edit | Undo Delete |
| MARY STEWART | Social Security | \$16,608.00 | Edit | Delete |
| MARY STEWART | Welfare Benefit | \$750.00 | Edit | Delete |

Showing 1 to 3 of 3 entries

[Go Back.](#) [I have finished this step. I am ready to continue.](#)

14 Click **Add Assets**.



If you are working on a recertification, existing asset information will be pulled from Voyager. You will only have to input changes to asset information.

Application Progress 36%

Let's look at asset information...

We have the following asset information on file.

Click **Review and Confirm** to review each asset and provide updates, if needed.
Click **Add Asset** to report new asset information.

Add Asset

15 Add details about an asset. When finished, click **Save**.

Tell Us About Asset Information

Asset Details | Asset Type Definitions

| | |
|---|----------------------|
| Who owns this asset?* | MARY STEWART ▼ |
| What type of asset is this? Click Here for asset type definitions. | Bank Accounts ▼ |
| What is the name of this financial institution? | Chase |
| What type of bank account is this? | ▼ |
| What is the average market value of this asset? | \$500.00 |
| Does this account earn interest? | ▼ |
| Notes: | <input type="text"/> |

Save | Cancel

a If you have trouble filling out the **What type of asset is this?** field, you may click the **Asset Type Definitions** tab.

The Asset Type Definitions tab

Asset Details | Asset Type Definitions

[Back to Asset details](#)

| | |
|----------------|---|
| Bank Accounts | Cash held in savings and checking accounts. |
| Investments | Treasury bills, certificates of deposit, mutual funds, and money market accounts. |
| Cash | Any cash not in a bank, such as: <ul style="list-style-type: none">• Cash on hand or at home.• Balance on EBT or similar cash benefit debit account.• Cash in a safety deposit box. |
| Stocks & Bonds | Interest or dividends earned from stocks and bonds. |
| Real Estate | Any real estate, land contracts, or other capital investments. |

16 After adding assets, you can review and edit them. When finished, click **I have finished this step. I am ready to continue**. The **Add Expense** step appears.

Application Progress 36%

Let's look at asset information...

We have the following asset information on file.

Click **Review and Confirm** to review each asset and provide updates, if needed.
Click **Add Asset** to report new asset information.

Add Asset

Search:

| Name | Asset Name | Value | | |
|--------------|----------------------|----------|-------------|---------------|
| MARY STEWART | Bank Account - Chase | \$500.00 | Edit | Delete |

Showing 1 to 1 of 1 entries

Go Back. **I have finished this step. I am ready to continue.**

17 Click **Add Expense**.



If you are working on a recertification, existing expense information will be pulled from Voyager. You will only have to input changes to expense information.

Application Progress 45%

Let's look at expense information...

We have the following expense information on file.

Click **Review and Confirm** to review each expense item and provide updates, if needed.
Click **Add Expense** to report any new medical, disability or childcare expense information.

Add Expense

18 Add details about an expense. When finished, click **Save**.

Tell Us About Expense Information

Expense Details | Expense Type Definitions

| | |
|---|--|
| Who has this expense?* | MARY STEWART ▾ |
| What type of expense is this? Click Here for expense type definitions. | Childcare Expense ▾ |
| | Childcare for household members 12 years old or younger. Note: If you pay |
| Who is the provider of the childcare?* | Johnson Daycare |
| How often do you pay for the childcare? * | Weekly ▾ |
| How much is each payment?* | \$50.00 |
| Does this child care expense allow someone in the household to work or go to school?* | Looking for Work ▾ |

Save Cancel

a If you have trouble filling out the **What type of expense is this?** field, you may click the **Expense Type Definitions** tab.

The Expense Type Definitions tab

Tell Us About Expense Information

Expense Details | Expense Type Definitions

[Back to Expense details](#)

| | |
|-------------------|---|
| Childcare Expense | Childcare for household members 12 years old or younger. Note: If you pay childcare expenses for household members who are 12 years old or younger, you may be eligible for a deduction. Only reasonable, unreimbursed expenses will be considered, and those expenses must be less than the total earned by the working adults. To be eligible, all adults in the household must either be working, looking for work, or attending school full-time or part-time during the designated hours. Adult household members who do not meet this criteria must demonstrate why they are unable to care for the child. |
| Medical Expense | Eligible medical expenses that exceed 3 percent of your annual gross income. Note: If you have HUD-approved medical expenses that exceed 3 percent of your annual gross income, you may be eligible for a deduction. If you qualify as an elderly household, you may claim the medical expense deduction for every member of your family. Landlords have the choice of using either 12 months of prior eligible |

19 After adding expenses, you can review and edit them. When finished, click **I have finished this step. I am ready to continue.** The **Final Review & Submission** step appears.

Application Progress 45%

Let's look at expense information...

We have the following expense information on file.

Click **Review and Confirm** to review each expense item and provide updates, if needed.
Click **Add Expense** to report any new medical, disability or childcare expense information.

Add Expense

Search:

| Name | Expense Description | Annual Cost | | |
|--------------|-------------------------------------|-------------|-------------|---------------|
| MARY STEWART | Childcare Expense - Johnson Daycare | \$2,600.00 | Edit | Delete |

Showing 1 to 1 of 1 entries

Go Back. **I have finished this step. I am ready to continue.**

20 Read the **Final Review & Submission** message. Click **Save and Continue.** The **Errors** screen appears.

Application Progress 55%

Final Review & Submission

You are almost done! Before submitting your recertification, let's check for errors, upload verification documents, and review your information.

Go Back. **Save and Continue.**

21 Review the errors.



The errors appearing on this screen are parts of the certification RENTCafé PHA has determined require extra scrutiny. In this example, RENTCafé PHA detected an adult member of the household without any income listed. This situation is possible, of course, but RENTCafé PHA wants to double check that it is correct.

The screenshot shows a web application interface. At the top, there is a progress bar labeled 'Application Progress' with a blue segment indicating 64% completion. Below the progress bar is a section titled 'Errors'. A search box is located to the right of the 'Errors' section. Below the search box is a table with two columns: 'Error' and 'Corrective Actions'. The table contains one row with the following content:

| Error | Corrective Actions |
|--|--|
| Gary Stewart has no income records. Confirm this is correct or add an income record. | <input type="button" value="Confirm"/> <input type="button" value="Add"/> |

At the bottom of the screen, there are two buttons: 'Go Back.' and 'Save and Continue.'

- To confirm that the adult family member does not have any income sources, click **Confirm**.
- To return to the income section of the certification to add an income for the adult family member, click **Add**.

22 When finished correcting errors, click **Save and Continue**. The **Documents** screen appears.

23 In order to upload a supporting document, click **Upload** in the row corresponding to the document of interest.



In this example we will be uploading a copy of a Social Security Card for Gary Stewart.

Application Progress 73%

Documents

Please upload items of importance; for example, drivers license, Social Security card, birth certificate, and so on. If you are unable to upload the necessary documents at this time, click **Save and Continue**. We will gather the information at a later date.

Search:

| Document | | | |
|---|------------------------|----------------------|--|
| MARY STEWART - Johnson Daycare - Upload necessary documents. | Upload | Scan | |
| MARY STEWART - Chase - Upload necessary documents. | Upload | Scan | |
| MARY STEWART - Welfare Benefit - Upload necessary documents. | Upload | Scan | |
| MARY STEWART - Social Security - Upload necessary documents. | Upload | Scan | |
| Gary Stewart - Scan a copy of your Social Security card. | Upload | Scan | |
| Gary Stewart - Scan a copy of your driver's license or other government-issued photo ID | Upload | Scan | |
| Scan other household documents. | Upload | Scan | |

Showing 1 to 7 of 7 entries

[Go Back.](#) [Save and Continue.](#)

24 The **Upload Document** screen appears. Click **Choose Files**.

Upload Document ✕

[Choose Files](#) No file chosen [Upload](#)

25 The file explorer will appear. Locate the file you want to upload.

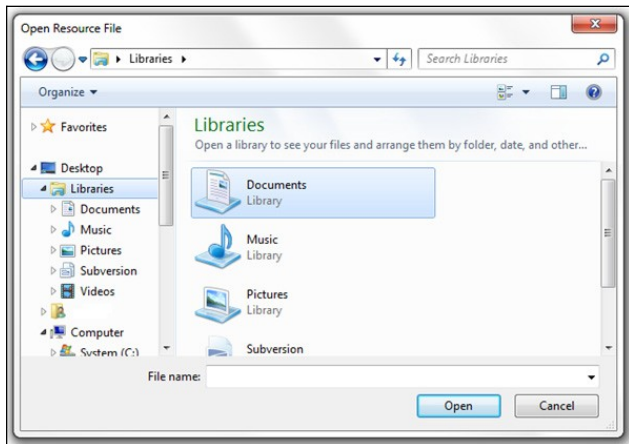


RENTCafé PHA will only accept image files, MS Word documents and PDF files.

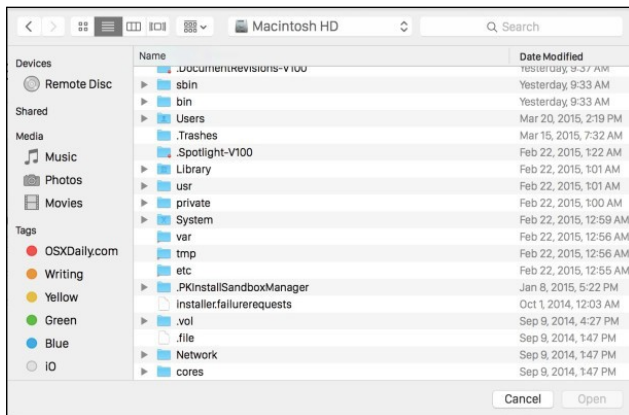


The look of the file explorer vary depending on whether you are using a computer or a mobile device. The look will also vary depending on which operating system you are using on your device.

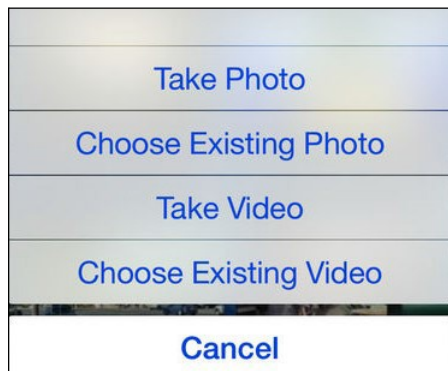
A typical Windows File Explorer



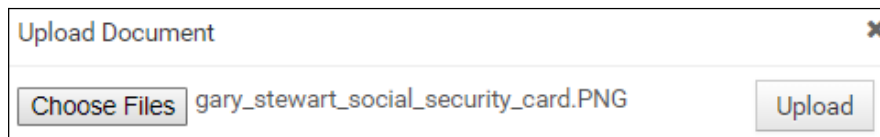
A typical Mac OS File Explorer



A typical iOS File Explorer



26 After you locate your document with the file explorer, you will return to the **Upload Document** screen. Click **Upload**.



27 You now have the option to view or remove the document.



28 Repeat steps 23-26 for all required documents. When finished, click **Save and Continue**. The **Summary** step appears.

29 Review all the household information that you entered throughout the application. Check the box certifying that the “Information I provided is true and correct...”.

Application Progress 82% Upload Documents

Summary

This list shows all of the information that you entered. Please review it for accuracy and completeness.

Add/Edit Member

| First Name | Last Name | Date of Birth | Relationship | Age | Gender |
|------------|-----------|---------------|-------------------|-----|--------|
| MARY | STEWART | 4/25/1980 | Head of Household | 37 | Female |
| David | Stewart | 2/2/2000 | Youth<18 | 17 | Male |
| Gary | Stewart | 1/5/1983 | Spouse | 35 | Male |

I hereby certify that the information I provided above is true and correct to the best of my knowledge. I understand that a false statement may disqualify me for benefits.

Go Back.
Save and Continue.

30 Click **Save and Continue**. The **Sign and Submit** screen appears.

31 Now all adult members in your household will sign documents verifying that the household information entered is true and correct. In the row corresponding to the adult family member of interest, click the **Click here to Sign** button. The **Sign Document** screen appears.

Application Progress 91% Upload Documents

Submit

After signing all documents, you have completed the annual recertification process.

| Document | View | Sign |
|---|--|--|
| Household Documents for MARY STEWART to Sign | View Document (Unsigned) | Click here to Sign |
| Household Documents for Gary Stewart to Sign | View Document (Unsigned) | Click here to Sign |

Showing 1 to 2 of 2 entries

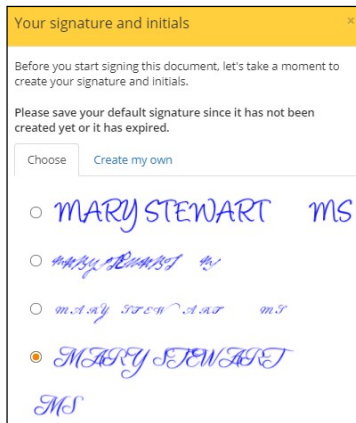
Go Back.

32 On the Sign Document screen, click Create Signature.

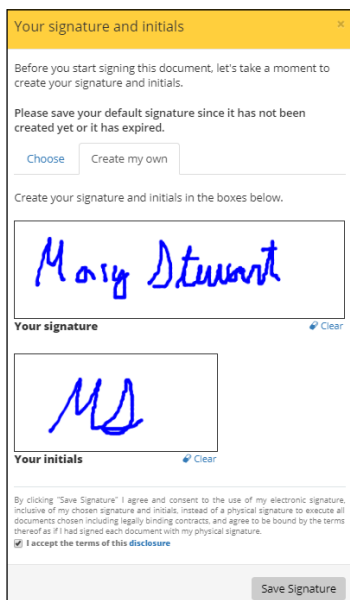


33 You have the option of choosing a computer generated signature or creating your own.

- If you want to choose a computer generated signature, click the button next to one of the signatures on the **Choose** tab.



- If you want to create your own signature, click the **Create my own** tab.



34 Read the terms and conditions and then check I accept the terms of this disclosure.

35 Click Save Signature.

36 Now that you have created your signature, you will add it to the relevant parts of the document. Scroll down until you see yellow boxes marked Sign and Date.



| Expense Information | | |
|---------------------|-----------------------------------|-------------|
| Household Member | Expense Description | Annual Cost |
| MARY B STEWART | Childcare Expense Johnson Daycare | 2600.00 |

By signing below: I/We certify that the information given to the Housing Authority on household composition, income, net family assets, and allowances and deductions is accurate and complete to the best of my/our knowledge and belief. I/We understand that false statements or information are punishable under federal law. I/We also understand that false statements or information are grounds for termination of housing assistance and termination of tenancy.

Warning! Title 18 Section 1001 of the United States Code, states that a person is guilty of a felony for knowingly and willingly making false or fraudulent statements to any department or agency of the United States. You can go to jail if you have knowingly provided false or misleading information on this form! False statements or information are grounds for termination of your housing assistance, tenancy, or application.

All ADULT household members must sign a copy

| | | | |
|--|---|------------|-------|
| Signature: Sign | Date: Date | Signature: | Date: |
| Signature: | Date: | Signature: | Date: |
| Signature: | Date: | Signature: | Date: |


 PHA Housing Authority
 Housing Authority Address goes here
 Phone number here
 

- 2 -

37 Click each box. The signature you created and the date appear.

| Expense Information | | |
|---------------------|---------------------|-------------|
| Household Member | Expense Description | Annual Cost |
| MARY B STEWART | Childcare Expense | |

By signing below: I/We certify that the information given to the Housing Authority on household composition, income, net family assets, and allowances and deductions is accurate and complete to the best of my/our knowledge and belief. I/We understand that false statements or information are punishable under federal law. I/We also understand that false statements or information are grounds for termination of housing assistance and termination of tenancy.

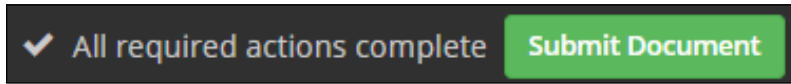
Warning! Title 18 Section 1001 of the United States Code, states that a person is guilty of a felony for knowingly and willingly making false or fraudulent statements to any department or agency of the United States. You can go to jail if you have knowingly provided false or misleading information on this form! False statements or information are grounds for termination of your housing assistance, tenancy, or application.

All ADULT household members must sign a copy

| | | | |
|----------------------------------|-------------------------|------------|-------|
| Signature: <i>MARY B STEWART</i> | Date: <i>01/30/2018</i> | Signature: | Date: |
| Signature: | Date: | Signature: | Date: |
| Signature: | Date: | Signature: | Date: |

38 Scroll through the document, and place signature and date in each location they are required.

When you have finished the following message appears.



39 Click **Submit Document**.

You will be returned to the **Sign and Submit** screen. It will display a **Signing Complete** message.

Application Progress 91% [Upload Documents](#)

Submit
After signing all documents, you have completed the annual recertification process.

| Document | View | Sign |
|---|--|------------------------------------|
| Household Documents for MARY STEWART to Sign | View Document (Signed) | Signing Complete |
| Household Documents for Gary Stewart to Sign | View Document (Unsigned) | Click here to Sign |

Showing 1 to 2 of 2 entries

[Go Back](#)


40 Repeat steps 30-38 for each adult family member.

After you finish signing for every adult household member, your intake certification or annual certification will be submitted automatically. A congratulatory message appears.



The message that appears on this screen is customizable. See “Appendix A: Page Narratives” in the *RENTCafé Public Housing (PHA) Setup Guide*.

Application Progress 100% [Upload Documents](#)

 Congratulations you have completed your recertification! One of our property managers will contact you within 24 hours.

| Document | View | Sign |
|---|--|------------------|
| Household Documents for MARY STEWART to Sign | View Document (Signed) | Signing Complete |
| Household Documents for Gary Stewart to Sign | View Document (Signed) | Signing Complete |

Showing 1 to 2 of 2 entries

[Go Back.](#) [Log Out.](#)