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 RENT*Café* 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 RENT*Caf*é PHA. The workflow that your PHA uses may vary from this default.

To complete an Intake Certification or Annual Recertification

ℹ️ You must begin this procedure from the **RENT*Café* Dashboard**. Your **RENT*Café* Dashboard** will look similar (but not necessarily exactly like) "**Example RENT*Café* dashboard.**"

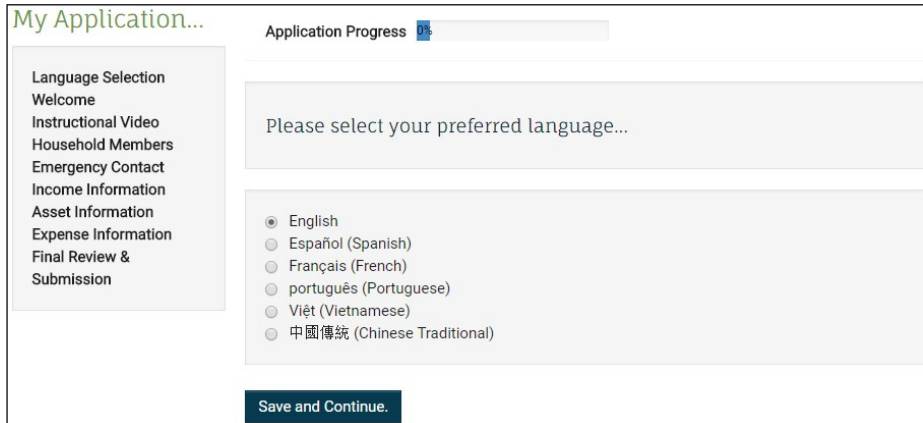### Example RENT*Café* dashboard

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.
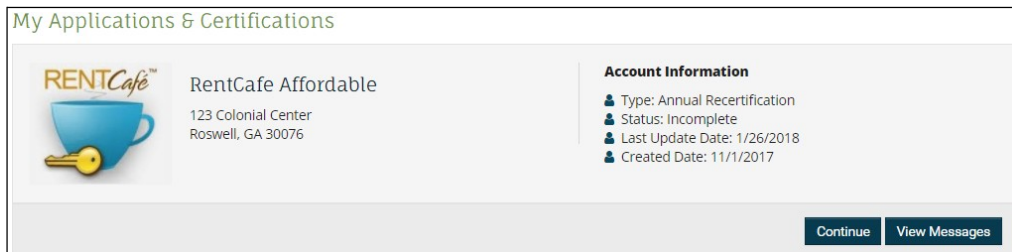
Example First Workflow Step

- 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 **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
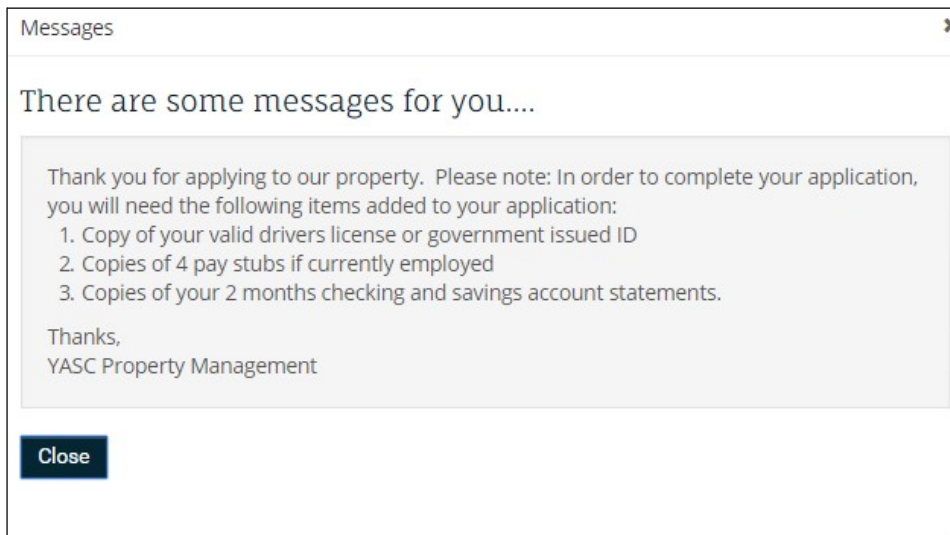
3   Click the button next to your preferred language for the workflow.
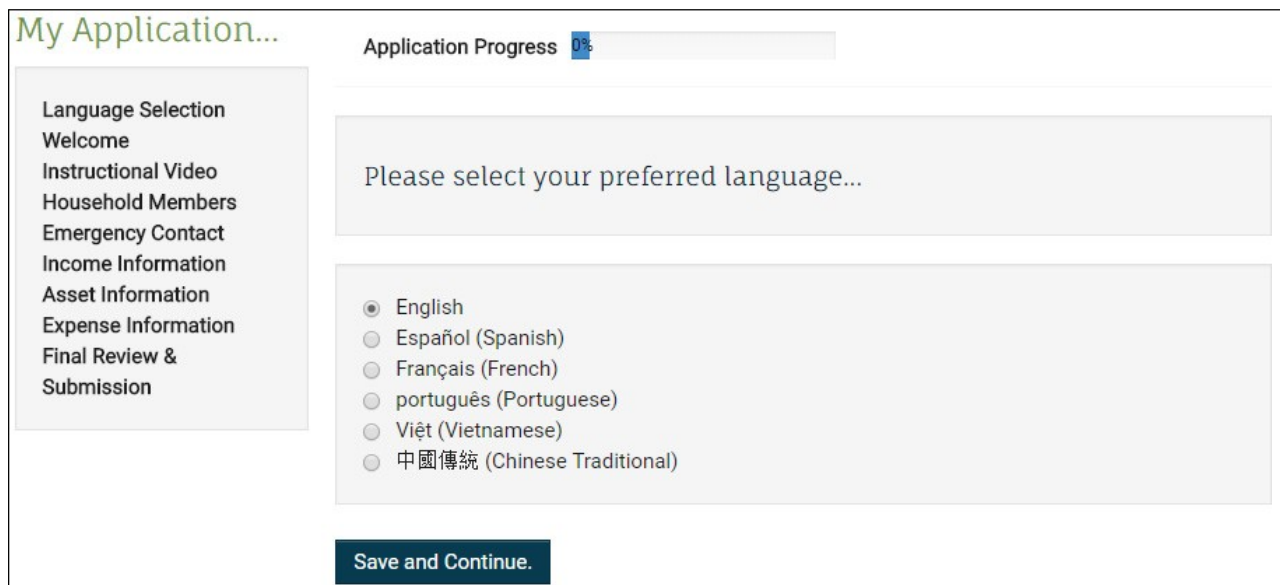
4   Click **Save and Continue**. The **Household Members** step appears.

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	☐
Last Name*	STEWART
Date of Birth*	
Social Security Number*	
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.

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.

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

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.

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?   Social Security ▼
Click Here for income type definitions.

How often is this income received?*   Annually ▼

How much does this person receive for each income payment?* $16,608.00

Additional Information

Save   Cancel

a 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.

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.

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:	

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: • 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.

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.

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

   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

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.

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

21 Review the errors.

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

Application Progress	64%		

Errors

Search: _____

Error	Corrective Actions
Gary Stewart has no income records. Confirm this is correct or add an income record.	Confirm Add

Go Back.   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

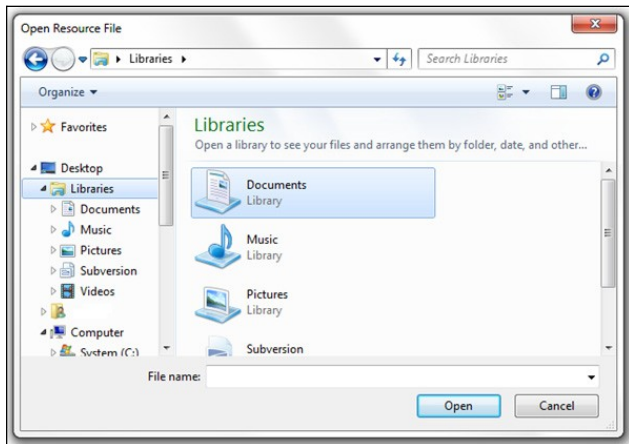**25** The file explorer will appear. Locate the file you want to upload.

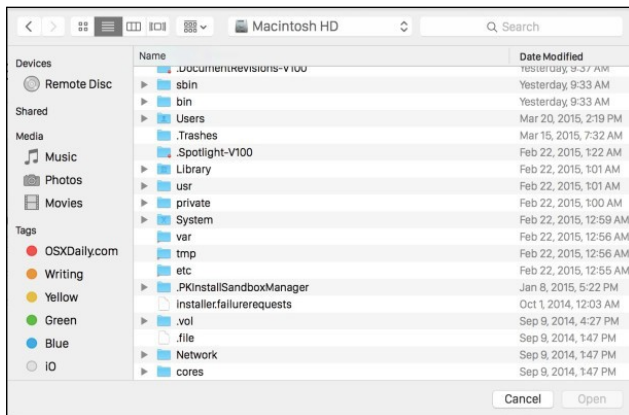RENT*Café* PHA will only accept image files, MS Word documents and PDF files.

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.
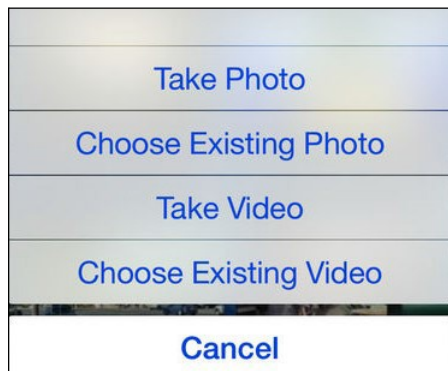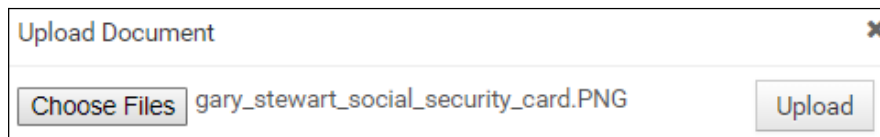
A typical Windows File Explorer

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...".

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.
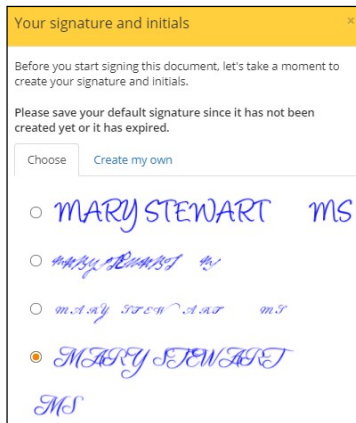
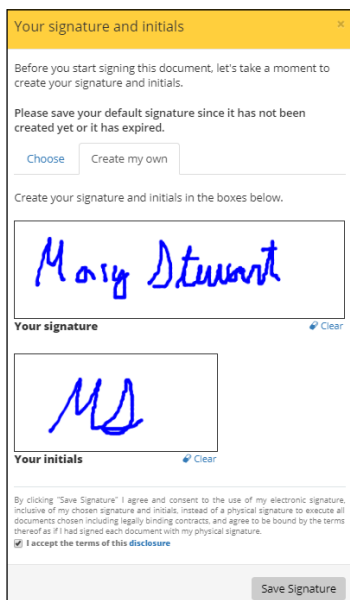**32** On the **Sign Document** screen, click **Create Signature**.

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 Descript**
MARY B STEWART	Childcare Expense

By signing below: I/We certify that the information given to the family assets, and allowances and deductions is accurate and co understand that false statements or information are punishable or information are grounds for termination of housing assistance

Warning! Title 18 Section 1001 of the United States Code, state making false or fraudulent statements to any department or ag knowingly provided false or misleading information on this for termination of your housing assistance, tenancy, or application

All ADULT household me

Signature:	*MARY STEWART*	Date:	*01/30/2018*	Signa
Signature:		Date:		Signa
Signature:		Date:		Signa

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

When you have finished the following message appears.
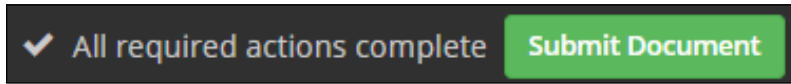
39 Click Submit **Document**.

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

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

After you finish signing for every adult household member, your intake certification or annual certifica- tion 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*.