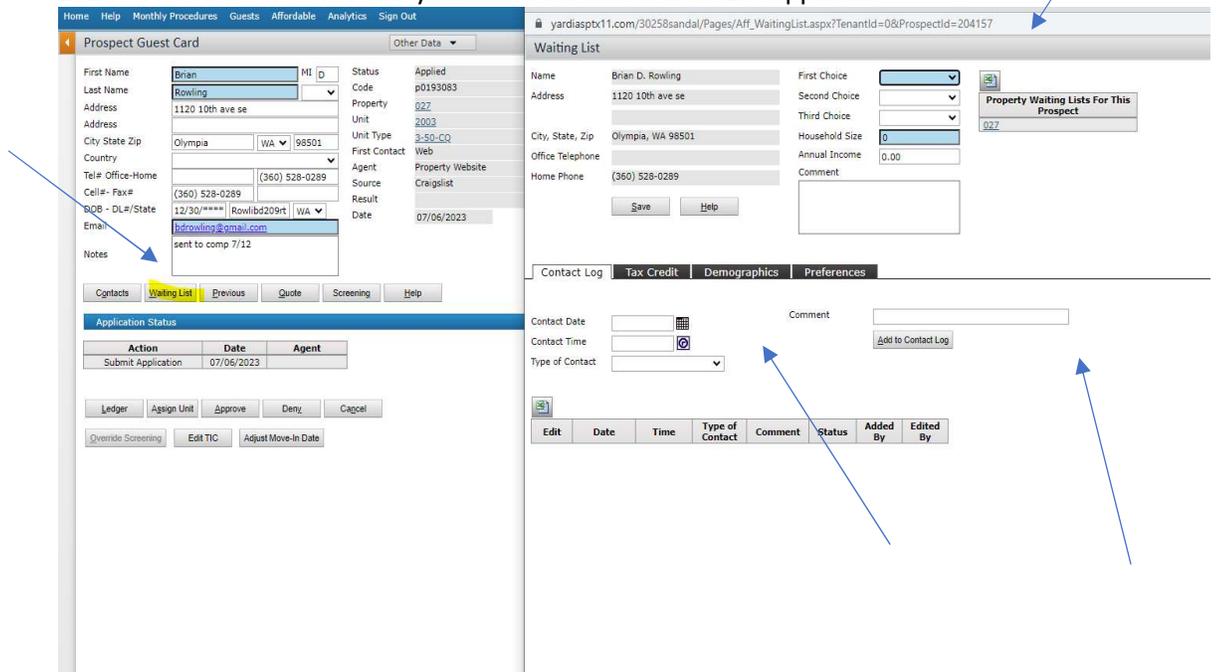


Wait List Management

- To add an applicant to the Voyager Wait List, Select (Waiting List) from the prospect card.
- Blue fields are required; First Choice (bedroom size) and household size. Applicants can select up to 3 choices. **Only 2 choices are recommended.**
- For the bottom fields of the below screenshot, enter *Contact date*, *Contact Time* and *Type of Contact*
 - Select “New Application” from the *Type of Contact* dropdown when adding an applicant to the Waiting List manually
 - Add a Comment if needed. Example- “New Applicant- would like to move-in August 2023.” A comment is not always needed for a new Wait List applicant



For Applicants that are moved over from Rent Café Site Manager Waiting List workflow, the Contact log note will show as below (this cannot be edited)

Contact Log	
04/07/2023 9:14 PM,	New Application, Applied as Erica McIntosh. New Application : via RENTCafé, On List



Contacts: Once you are notified of an upcoming vacancy, contact applicants based on their Waiting List Rank as well as bedroom size/preferences. It is very important that applicants are contacted for an available unit in the order in which they applied (and based on preferences).

Contact the applicant 3 times, 48 hours apart. If no contact is made or a call is not returned from the applicant showing interest, remove the applicant from the Waiting List. **Do not leave applicants on the waiting list indefinitely.** Purging your Wait List is a very important process.

When you contact an applicant, below is some information on what to inquire about when you call:

- *How many people are in your household?*
- *When are you looking to move -in? Note- if applicant is not ready to move, you can leave them on the waiting list. Make sure you make a note indicating applicant is not ready to move but will remain on the Waiting list and they will be contacted when the next unit is available.*
- *Are you interested in a 2 or 3BR?*
- *What is your annual income? Is it verifiable?*
- *Advise them of the \$35/50pp App fee. (They can pay it online if they apply via the Site Manager workflow)*
- *Income must fall at or below the below—this depends on the # of people in the household. See Qualifying Criteria for specific income limits. Here is an example:*

<u>MAXIMUM ANNUAL INCOME FOR RENT RESTRICTED APARTMENT HOMES (5/2023)</u>								
	1 person	2 people	3 people	4 people	5 people	6 people	7 people	8 people
50% AMI	\$30,750	\$35,150	\$39,550	\$43,900	\$47,450	\$50,950	\$54,450	\$57,950
60% AMI	\$36,900	\$42,180	\$47,460	\$52,680	\$56,940	\$61,140	\$65,340	\$69,540

If applicant is interested in a unit and they can do the Applicant process online, move them to the Move-in Workflow in Site Manager. See Powerpoint provided by Compliance for this process.

When contacting applicants, always enter a *Contact Date* and *Contact Time* when you are making contact. This is very important, as it shows we are contacting applicants based on when they applied. **A note is required to be added.** See below examples of acceptable notes.



Waiting List

Name: Jose L. Gloria
 Address: 7634 umbra heights
 City, State, Zip: San antonio, TX 78252
 Office Telephone:
 Home Phone: (210) 705-9809

First Choice: 3 BR
 Second Choice:
 Third Choice:
 Household Size: 1
 Annual Income: 24,000.00

Comment:

Property Waiting Lists For This Prospect: 030

Save Help

Contact Log | Tax Credit | Demographics | Preferences | Position

Contact Date:
 Contact Time:
 Type of Contact:
 Comment:
 Add to Contact Log

Edit	Date	Time	Type of Contact	Comment	Status
	06/30/2023	1:43 PM	Update	still interested - can't move-in this month but would like monthly check-ins - BS	On List
	06/22/2023	3:10 PM	Update	Jose called back - concerned about credit check - follow up tomorrow to see if moving forward - BS	On List
	06/22/2023	2:38 PM	Update	lvm about current waitlist availability - BS	On List
	04/10/2023	5:13 PM	Update	Skipped by Destiny A. Vasquez. Reason: No response	On List
	02/01/2023	2:17 PM	New Application	Applied as Jose Gloria. New Application : via RENTCafé	On List

Examples of notes for multiple applicants:

Rank	Prospect Property	Name and Address	BR Size Pref	Effective Date	Effective Time	Household Size	Comment	Preferences	TC Special Needs	TC Percent of AMGI	Current Status	Contact Log
1	030	Jose L. Gloria 7634 umbra heights San antonio, TX 78252 Home: (210) 705-9809	3BR-First Choice	02/01/2023	2:17 PM	1				0.00	On List	06/30/2023 1:43 PM, Update, still interested - can't move-in this month but would like monthly check-ins - BS, On List 06/22/2023 3:10 PM, Update, Jose called back - concerned about credit check - follow up tomorrow to see if moving forward - BS, On List 06/22/2023 2:38 PM, Update, lvm about current waitlist availability - BS, On List 04/10/2023 5:13 PM, Update, Skipped by Destiny A. Vasquez. Reason: No response, On List 02/01/2023 2:17 PM, New Application, Applied as Jose Gloria. New Application : via RENTCafé, On List
2	030	Maria T. Dominguez 2624 H. Georgia Ave Veslaco, TX 78099 Home: (956) 314-9958	3BR-First Choice	02/06/2023	8:29 PM	5				0.00	On List	06/30/2023 1:46 PM, Update, lvm about current waitlist availability - BS, On List 06/22/2023 2:40 PM, Update, lvm about current waitlist availability - BS, On List 04/10/2023 5:13 PM, Update, Skipped by Destiny A. Vasquez. Reason: No response, On List 02/06/2023 8:29 PM, New Application, Applied as Maria Dominguez. New Application : via RENTCafé, On List
3	030	Marquisashae Brown 5434 Gault St Ft. Worth, TX 76147 Home: (318) 289-7390	3BR-First Choice	02/16/2023	4:08 PM	2				0.00	On List	07/03/2023 5:00 PM, Active, called lvm and emailed to schedule a tour, On List 06/30/2023 2:09 PM, Update, still interested - currently in Houston - relocating from LA (state) - emailed info, On List 06/22/2023 2:57 PM, Update, scheduled tour for - BS, On List 04/10/2023 5:13 PM, Update, Skipped by Destiny A. Vasquez. Reason: No response, On List 02/16/2023 4:08 PM, New Application, Applied as Marquisashae Brown. New Application : via RENTCafé, On List

Note- There are certain *Types of contacts* that remove an applicant automatically. For example, *Applicant Rejected*, *Application Removed*, removes an applicant automatically. Moved to Bottom of Wait List moves an applicant to the bottom of the Wait List. **Be sure to add a comment (note) and click Save.**

If an applicant is on the Waiting List, make sure you work off of this prospect card for the duration of Application processing. As you go through the workflow and move an applicant in (execute Lease), you will be prompted to remove the applicant from the waiting list. See below example. This process will automatically remove the applicant from the waiting list. Make a note- "Applicant provided all compliance documents timely and is moving into Unit XX." Make sure the note makes sense, especially if you are moving in someone ahead of another applicant.



Yardi Systems, Inc. - Execute Lease - Google Chrome

yardiasptx11.com/30258sandal/Pages/ResProspectActions.aspx?ProspectId=...

Execute Lease

Shu Lan Ma, HUD Waiting List Rank: 1

Date: 10/23/2020
Time: 10:40 AM
Agent: Terri Washam

Execute Lease Comment for Waiting List Contact Log
Moving into Unit #3203

Save

Function

Status	Approved
Code	p0059562
Property	045
Unit	01-3203
Unit Type	I-I-INT
First Contact	Call
Agent	N/A
Source	N/A
Result	
Date	05/11/2017

Leasing Steps

- Guest Card
- Preferences
- Occupants
- Select Unit
- Rental Options
- Concessions
- Application Form
- Application Charges
- Application Status**

Charges

Receivables

Payables

Notes

Contacts | **Waiting List** | Previous | Quote | Screening | Help

Application Status

Action	Date	Agent
Application Approved	10/19/2020	
Submit Application	10/07/2020	

Ledger | Assign Unit | Move In Calculator | Lease Doc | **Execute Lease** | Cancel | Connect Utilities

Edit S0059 | Edit TIC | Adjust Move-In Date