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# WEBINAR TRAINING

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## **PROPERTY MANAGEMENT SERIES:**

The Property Management Series is designed for property managers in the affordable housing industry who are looking to develop strong compliance knowledge. Class offerings range from basic to advanced and all classes include realistic scenarios. This webinar series focuses on skills that are critical for maintaining compliance with various HUD occupancy rules and regulations. Participants will learn how to apply regulations and techniques to test their understanding, thought process for solutions, and application in the real world.

**New Manager:** Focusing on fundamental skills critical for maintaining compliance with HUD regulations, these classes are provided for managers new to affordable housing. Discussion and practice in applicant and tenant eligibility is the highlight of these classes.

**Intermediate Management:** Building on concepts introduced in the New Manager classes, these classes provide a deeper understanding of HUD regulations. Challenging topics and scenarios, including waitlist management and continued tenant eligibility, are the highlights of these classes.

**Advanced Management:** Building upon the Intermediate classes, this class focuses on practice of a variety of complex scenarios within HUD multifamily housing programs. Hands on practice is the focus of this class.

### **New Manager 101 - Tenant Interviews**

The tenant interview is the prime opportunity to discuss financial circumstances with a subsidized household. Important discussions during the interview can save managers' time and frustration down the road. This introductory webinar is geared towards new staff that interview tenants at move-in and during recertifications. How thorough is your tenant interview process? Are your application and recertification questionnaires compliant with Change 4 or are these documents stale? Are you asking all the right questions during the interview versus seeking clarification from the tenant days later?

In this class, you will learn how to fine tune your interviewing skills and support your final income determinations during an efficient interview. Discover the most common interviewing mistakes and "shortcut pitfalls" and how to avoid them. Become a "pro interviewer" and master the art and skill of working smarter, not harder.

### **New Manager 102 - Calculating Annual Income for 50059s**

Consistently and accurately projecting annual income on a 50059 is a proficiency that continuously needs to be refined by experience. Ironically, it is also one of the first skills new managers are expected to develop. This class is geared towards new staff that interview tenants and perform income calculations for HUD 50059s. Learn what types of income count and do not count on the 50059. Practice with fundamental calculation methodologies. Using case studies, we will explore when you can utilize EIV Income Reports as the sole source of income verification and when other methods of verification are required. This webinar is absolutely necessary for housing professionals establishing the skill set for accurate income eligibility determination and 50059 calculations.

### **New Manager 103 - Determining the Cash Value of Assets**

Understanding assets can be tricky. Before you can calculate asset income, you **must** 1) correctly identify all assets for the household, and 2) establish their cash value.

This new manager-level class is designed for those staff that interview tenants during the certification and recertification processes. Do you know what counts as an asset and what doesn't? How often **must** assets be verified? What is the difference between cash value and market value? How do you estimate the value of real estate or insurance policies? During this interactive webinar, we will use real-life examples to illustrate different types of assets and their correct valuation. Learn new interviewing techniques that will help ensure all assets are being identified during the interview prior to move-in or annual recertification.

## New Manager 104 - Expenses and Deductions

This is a great class for those new to the industry or those that would like a refresher course on how to accurately calculate expenses and deductions on the 50059s. Participants will learn about the different categories of deductions; which households are eligible for which deductions; and, of course, how to calculate them. We'll cover inclusions and exclusions, and what types of verifications are required to support medical expenses. Learn when a wheelchair is a disability deduction and when it's a medical deduction. Test your understanding of the regulations via our real life scenarios during this eye-opening class.

## Intermediate Management 201 - Waiting List & Tenant Selection

Our Waiting List & Tenant Selection webinar will provide an in-depth discussion on the requirements and other activities surrounding tenant selection process. What are the required and recommended contents of the Tenant Selection Plan? Are you properly following the wait list regulations as noted in the HUD 4350.3 handbook including application acceptance, processing, and record keeping? How do we select the correct applicant from our wait list? All these questions and more will be answered with this webinar. This is a "can't miss" for new managers or seasoned professionals looking for a refresher.

### Session Highlights:

- Tenant Selection Plan (TSP) Requirements overview
- Application acceptance, processing, and record keeping requirements
- Tenant selection and screening criteria
- Creating and maintaining waiting lists, including opening and closing the list
- Income Targeting regulations and the effect on the wait list

## Intermediate Management 202 - Income, Assets, and Expenses

Mastering accurate income, asset, and expense calculations is a crucial skill set for all housing professionals. This intermediate-level class will present new scenarios to those who have grasped the basic calculation methodologies. Via real life case studies, we will explore more complicated scenarios involving income, assets, and expenses to help guide accurate calculations and reporting on the 50059.

### Session Highlights:

- Review more complex income calculations resulting from fluctuating income, business income, and student income.
- Identify, through the applicant/tenant interview process, when an asset must be converted to an income source.
- Learn the difference between current asset income and imputed asset income.
- Examine ways to calculate the income from assets when the value fluctuates.
- Practice calculating the income from assets using real-world scenarios.
- Learn how to justify including or excluding expenses to a tenant during a recertification interview.
- Practice addressing "gray area" expense scenarios not discussed in the Handbook.

## Advanced Management 301 - Challenging Scenarios in HUD Compliance

This advanced level webinar will focus on more complex scenarios to test your knowledge and understanding of some of the more difficult or less common scenarios that occur within HUD multifamily housing program properties. This Advanced Management class will build upon the intermediate level classes by providing several challenging scenarios that we occasionally come across. During the webinar, the instructor will use real-life examples to illustrate those topics that are not always common when determining eligibility of new households as well as recertifying current households. We will explore various program eligibility regulations including income, asset, and expense related scenarios to challenge the participant to test their understanding of HUD rules and how to apply them correctly and consistently.

## **FAIR HOUSING SERIES:**

The Fair Housing Series offers several detailed Fair Housing courses for those who are new to the housing/property management industry, as well as seasoned housing professionals looking for a refresher or update. This series contains updated guidance and references from HUD.

### **Fair Housing Basics**

Attend this PMCS webinar and gain insight into the major Fair Housing laws, the Fair Housing Act (Title VIII of the Civil Rights Act of 1968), Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act (ADA). Understand who is protected under federal law, how state and local laws can impact this, and exemptions from the Fair Housing Act. Whether you are in management, day-to-day leasing or maintenance of rental housing, this course is for you!

In this webinar, we will provide a history and summary of key civil rights laws and a review of past and current housing discrimination complaints to set the stage for how to ensure your property is Fair Housing complaint. Additionally, we will walk through why you need to review your policies, practices and procedures routinely, how to handle reasonable accommodation/modification requests, and other best practices to implement to stay compliant with Fair Housing laws and avoid costly lawsuits.

Housing discrimination claims and violations can result from just one wrong answer or response to a tenant or applicant. Do not put your property or management company in harm's way, attend our informative overview to stay current on Fair Housing rules.

### **Fair Housing - Section 504 and Reasonable Accommodations**

Reasonable accommodation is one of Fair Housing's "hot topics". This typically accounts for over 50% of the fair housing complaints in the past year. Reasonable accommodations can be requested during the application process, occupancy period and also during an eviction process. It is important to learn and understand the correct protocols to follow since Reasonable Accommodations are requested primarily due to the existence of a physical or mental disability or impairment. It is important that one understand the definition of disability and when it comes into play to allow a disabled person to enjoy the same benefits and quality of life as a non-disabled individual.

#### **Session Highlights:**

- Definition of reasonable accommodation
- Definition of disability
- When accommodation is needed
- Difference between accommodation and modification
- Understanding what is "reasonable"
- Understand fair housing issues and how they impact your property
- Understand the need for accommodations
- Understand the fair housing laws about accommodations
- What properties fall under fair housing/ accommodation laws
- Know timeframe for requesting and granting of accommodations

## Fair Housing for Maintenance and Operational Staff

Fair Housing is an important topic for all members of your team. This webinar is focused on those team members who can be the most vulnerable to fair housing situations at your property – your maintenance and Operations team! This one hour course will provide a Fair Housing overview geared specifically toward maintenance personnel, janitorial and grounds keeping staff.

### Session Highlights:

- Understanding Fair Housing, Section 504 and ADA
- Review of real world situations and how to respond

## Fair Housing - Special Topics: VAWA, Assistive Animals, and Compliance Updates

As Fair Housing continues to evolve, it is important to keep up-to-date with new and updated regulations. This webinar is designed for the new manager as well as the seasoned professional and everyone in between. It is important to understand these policies and procedures to be sure you are implementing them properly.

### Session Highlights:

- Understanding VAWA Final Rule, Policies & Procedures
- Understanding the use of the Emergency Transfer Plan under VAWA
- Assistive Animals regulations and updated 2020 guidance from HUD
- Review of the ongoing changes within Fair Housing

## Fair Housing - Affirmative Fair Housing Marketing Plans

This interactive webinar is designed for owners, agents, property managers and site staff needing to update their existing Affirmative Fair Housing Marketing Plan (AFHMP). AFHMPs **must** be reviewed and updated, if necessary, every 5 years. In 2011, the AFHMP Form 935.2A was revised and significantly expanded. Owners or agents are now required to report demographic information from their property's existing tenant population, the property's waiting list and surrounding market area (via census information). Learn how to gather this online census information to complete the Form 935-2A. Get tips on best practices and ways to ensure your revised AFHMP is a complete submission while learning inexpensive, yet effective, advertising and marketing techniques to attract applicants to your property.

## EIV SERIES:

HUD's EIV System is a complex, yet critical system for HUD assisted housing managers to grasp. Learning the fundamentals of EIV, to include the timing of running each EIV report, what information is and isn't available in EIV, and understanding the interaction between EIV and HUD's TRACS system is key to appropriate EIV use and HUD compliance. Whether you are new to the affordable housing industry or just need focused training on EIV, PMCS' EIV webinars are a convenient, cost-effective option. What sets us apart? We don't just train you, we show you! These interactive webinars will equip participants with the understanding of foundational concepts necessary to use HUD's EIV system correctly for both applicants and in-place residents.

## EIV Master Reports and Existing Tenant Search

In this introductory EIV course, participants will be provided a concise overview of monthly and quarterly reports stored in the EIV Master File as well as the Existing Tenant Search. We will explore where to find them; when to print them; what the information means; how to use them and where to store them. Example screenshots will allow visual learners to follow along and engage in instructor-led discussions regarding the relevance of each report and the actions managers **must** take. Don't miss this fundamental class on EIV; it is a critical building block for maintaining a compliant EIV Master File!

## EIV Income Reports and Fundamentals of Discrepancies

To accurately interpret and resolve discrepancies, you **must** first understand the layout and content of the EIV Income Report. This intermediate level webinar will teach participants what types of income EIV recognizes, when such income “hits” the report and at what frequencies. Next, the group will explore the fundamentals of income discrepancies. Do you understand what prompts a discrepancy? Do you know how to calculate income earned during the Period of Income (POI) to reconcile income on a Discrepancy Report with income on the Income Report?

To master this skill, participants will learn how to read and dissect an Income Discrepancy Report and apply an effective methodology to identify and calculate income earned during the Period of Income via realistic case studies. This class is an absolute **must**-have for those establishing an EIV discrepancy resolution procedure for their property.

## Practice Resolving EIV Discrepancies

Are you frustrated with resolving EIV Discrepancies? Do you feel it’s a waste of time? Do you understand how to read the EIV Income Report, analyze and interpret the EIV Discrepancy Report and calculate the income during the applicable Period of Income; but...you struggle with determining if the discrepancy is valid or not and how to document resolution in the tenant file? This intermediate level class is designed for you! During this interactive webinar, participants will work with real-life case studies and learn how to utilize PMCS-created resolution forms to document resolution steps easily and with clarity. Turn your frustration and struggles into a game you can win and feel satisfied with a job well done! This a webinar training you do not want to miss!

## Advanced EIV Discrepancy Case Studies

Do you have many employed residents and a high percentage of discrepancy reports? Are you looking to take your understanding of this process up another notch? Are you finding the extensive, real-world experience PMCS shares enriching and valuable because ‘we get it’ and you want more? We would love for you to come alongside us for this advanced-level class that looks at applying our resolution methodology to more complex scenarios.

During this interactive webinar, the presenter will introduce challenging case studies that involve multi-member households with multiple income sources. The group will be tasked with developing a resolution action plan using PMCS-provided forms. These complex situations will test participant’s understanding of the methodology and make you aware of some of the imperfections and anomalies with the EIV system. Take the next step and celebrate mastering EIV Discrepancies.

## Creating and Reporting EIV Repayment Agreements

This class is designed for compliance staff, site managers, regional managers and accounting staff that handle recertifications (most notably at properties with working resident populations). During this webinar, the instructor will guide participants through common scenarios that prompt tenant repayment agreements. The instructor will test participant understanding of how the overpayment occurred and which lease obligation(s) the tenant did not meet, while sharing effective techniques to minimize a reoccurrence in the future. The group will then practice calculating the balance of overpaid subsidy owed to HUD and determine “who has to pay HUD and when”.

Next, using a realistic case study, the instructor will show participants how to correctly report various types of transactions on the new repayment agreement schedule of the voucher and how to adjust when terms of the agreement are not met. Don’t miss this engaging and valuable tutorial!

## **MOR SERIES:**

This Management and Occupancy Review (MOR) Series offers a comprehensive look at all the facets and steps required for a successful Management and Occupancy Review (MOR). This series is developed for those new to the affordable housing industry or those seeking a refresher for an upcoming MOR. Each session will tackle a different aspect of the MOR; from understanding the basic mechanics of an MOR to completing internal assessments of site policies and procedures, and to responding to and closing out the MOR.

### **MOR Part I - Understanding the Mechanics of a HUD MOR**

This webinar is perfect for new managers who have never undergone an MOR and also for seasoned managers that want an update and overview of the MOR process. Many new managers ask: What exactly happens during an MOR? How is the MOR Rating determined? How often will MORs occur?

In Part I of this three-part MOR series, participants will learn about each of the four stages of the MOR, new elements of the HUD Form 9834, the MOR rating methodology, and HUD's final rule for the risk-based approach to scheduling MORs effective September 2022.

Once participants complete Part I, they are encouraged to register for MORs Part II, which focuses on specific leasing and occupancy assessments that must be accurate and complete to be compliant and ready. Think you don't have time for this webinar training on MORs? Can you afford not to? Investment for training now will yield a significant amount of time and monetary savings for you and your property in post-MOR remedies.

### **MOR Part II - Assess Your Forms & Policies for Compliance**

Reinstatement of MORs for PBCA-administered HAP contracts has many Owners, Agents, Property Managers and Site Staff anxious about leasing and occupancy compliance. This is the second of a three-part webinar series designed to assist compliance staff and managers with their property's Management and Occupancy Review (MOR). In the world of HUD compliance, it is not enough to just "be aware of the new rules"; you **must** incorporate new requirements into forms, policies and procedures. This webinar will guide participants through a series of detailed leasing and occupancy assessments to assess compliance and help staff develop a plan to tackle required leasing updates and avoid potential areas on non-compliance. Participation in this class is a crucial step in achieving a favorable leasing and occupancy rating on your next MOR!

### **MOR Part III - Interpreting, Responding to, and Closing out MORs**

MORs have been occurring for the last few years and Owners, Agents, Property Managers, and Site Staff may find themselves struggling with responding and closing out past or current MOR findings. In the third session of a **three-part** webinar series designed to assist compliance staff and managers with understanding the Management and Occupancy Review (MOR), this webinar will guide participants through responding and closing out a MOR, with a look at common findings and example corrective actions that could be taken in several example scenarios. Participation in this class will provide the information needed to close out a MOR and successfully put in place controls and practices to prepare for better audits.

## **FOCUSED TOPICS:**

There's much more to affordable housing than just eligibility, rent calculations, and EIV. PMCS recognizes other critical operational tasks that managers **must** oversee to maintain compliance. Whether it's mandatory changes to existing procedures, implementation of new requirements, or adaptation to a new HUD initiative, the industry's obligation to react, can influence, and often shift, the training needs of the industry to topics that go beyond the fundamentals. This training series focuses on these "hot topic issues" that affect a broad array of properties. Classes in this category are relevant for all – from new managers through advanced industry veterans.

### **Industry Updates: HOTMA and TRACS 203A**

With the release of effective dates for HOTMA and TRACS 203A, now is the time to prepare for implementation of these changes at your property. This class will provide an in-depth review of the HOTMA regulations and how it intersects with TRACS 203A implementation scheduled for January 2024. Whether you are new to affordable housing or a seasoned professional, this class is a must.

#### **Session Highlights:**

##### **HOTMA:**

- Mandatory vs Optional Implementation Rules
- Required changes to forms, policies, and procedures
- Changes to income, assets, and deductions

##### **TRACS 203A**

- Changes to accommodate HOTMA and other recent regulatory changes
- Review of the TRACS 203A MAT User Guide

### **Special Claims**

Our Special Claims webinar will provide you with up-to-date content and information on the overall Special Claims process. The webinar identifies and discusses the different property types eligible to submit certain types of Special Claims, identifies submission deadlines, required checklists and documentation needed for each special claim type. Real world case studies further allow you to practice and hone your calculation skills for each claim type to help ensure a successful submission!

### **TRACS Fundamentals**

This class is a **must** for everyone...New Managers, Seasoned Managers, All Staff who deal with TRACS, as well as Owners and Agents. Your Contract Administrator is **not** the only one responsible for your certs in the TRACS System – **this is a shared responsibility**. You won't want to miss this 'nuts-and-bolts approach' to understanding HUD's TRACS system, including the TRACS cert and voucher messages, the **NEW TRACS User Recertification** requirement; and we will discuss the TRACS Rules of Behavior and Cyber Awareness Challenge requirements too.

This is a perfect time to take this webinar and establish the fundamental knowledge needed at your property or management company **before** TRACS 203A and 203B are released – to comply with **HOTMA** – the Housing Opportunity Through Modernization Act, and the **FAST Act** – Fixing America's Surface Transportation Act since they affect the tenant (re)certification process, tenant selection procedures and compliance software changes.

Take advantage of this opportunity to get the TRACS training you need, no matter how long you have been in the industry and how familiar you think you are with how TRACS works! Sign up today!



## TRACS: Voucher and Cert Queries

Do you run and review the TRACS queries/reports for your property? Or do you solely rely on your Contract Administrator (CA) for what you need to know about your certs and vouchers? This PMCS webinar contains more information every affordable housing manager, recert clerk or management personnel **must** know when dealing with TRACS. Learn which queries/reports are used to help prepare for your Management and Occupancy Review (MOR) and which query should be checked before starting an EIV discrepancy resolution.

Remember, monitoring TRACS is a shared responsibility with your CA. This class will review and explain each of the Voucher and Cert Queries/Reports in HUD's TRACS system. Learn how you can use these reports to better prepare for your Management and Occupancy Review (MOR) and how they are used by your Contract Administrator and/or HUD before their MOR site visit.

We will also take a closer look at **how** the TRACS system works in conjunction with HUD's EIV system, and which query will be a big help when you are trying to resolve an EIV discrepancy.

This is a perfect time for everyone to take this 2nd class in our TRACS webinar series to expand and/or confirm your TRACS knowledge before HUD implements more industry changes. Get the TRACS training you need, no matter how long you have been in the industry and how familiar you think you are with TRACS. Sign up today!

## Low Income Housing Tax Credit (LIHTC) for the Property Manager

Whether you are new manager or a seasoned professional, the Low Income Housing Tax Credit program can be challenging and difficult to understand. This class will provide an in-depth introduction and review for those new and experienced staff to gain a thorough understanding of LIHTC program essentials.

### Session Highlights:

- Development & Lease-Up
- Ongoing Compliance – including the Next Available Unit Rule and the Vacant Unit Rule
- Tenant Eligibility - including student rules, determining annual income & assets, and Leasing & Certification requirements.
- Multiple Program Compliance

This course is full of information & real-world situations to assist the property managers of LIHTC properties in understanding all the expected compliance regulations. Don't miss it!