Roommate Additions

STEP 1:

Existing roommate(s) will need to fill out a paper application. The paper application will need to be retained on file; this should not be scanned and attached to the resident record.

Charge the applicable application fee(s) manually. This can be paid in person or over the phone with a check, money order, or credit card.

The primary resident must be invited to Rent Café in order to invite the new roommates.

Add the new roommate(s) to the roommate screen.

Enter:

- First Name
- Last Name
- Toggle the lessee filter
- Enter Occupant Type (Should be Adult)
- Email Address
- Move in Date
- Choose Relationship
- Phone Number (s)

Click Save

Charge the new roommate(s) application fee(s).

STEP 2:

1. For roommates being added who want to fill out an online application:

Follow the steps above and click Edit on the new roommate from the roommate screen.

Click on Invite to Online Application.

The roommate will then be able to complete application, upload income verification and pay application fees online.

To review the new roommate(s) application:

- Go to primary resident screen
- Click on profile tab.
- Click on application form tab
- Click on applicants
- Choose new roommate to review
- If the applicant does not have a middle name toggle the "No Middle Name" toggle and click Save

Confirm new roommate uploaded income verification located on roommate screen under roommate attachment.

2. <u>For roommates being added who want to fill out a paper application:</u>

Applicant must complete a paper application. Please print NTS's paper application so ensure it includes the language regarding NSF's and the security deposit.

Follow Step 1 from above.

Invite the new roommate(s) which will create the application form record.

Update the application form in CRM. To go to the application form:

- Go to primary resident screen
- Click on profile tab.
- Click on application form tab
- Click on applicants
- Choose new roommate to review
- If the applicant does not have a middle name toggle the "No Middle Name" toggle and click Save

Upload the new roommate(s) income verification located on roommate screen under roommate attachment.

Go to the Screening page, and click the Update button.

STEP 3:

Go to the Screening page (go to Actions, then click Screening).

Click on Applicants and click the new roommate's name. Verify all the new roommate's application information has transferred over to the screening page. If it hasn't, click the Update button. Do this for all new roommates.

Click on Applicants on the screening page and click the existing roommate's name. Update any new information from their new, paper application. Do this for all existing roommates.

Upon completion and review of applications and payment of application fees, screen all roommates together.

Keep all paper applications in a binder in a secure location in the leasing office.

Upon a screening acceptance, generate the roommate addition form from online documents.

Do this by clicking:

- Documents
- Online documents
- Select roommate addition form
- Preview and print for wet signatures
- To send for online signature; preview and generate

Roommate addition form must be signed by all leaseholders and countersigned by property representative.

Electronic sign forms will automatically be attached. Wet signature forms should be scanned and attached.

Roommate Releases

All remaining roommate(s) will need to fill out a paper application. Please print NTS's paper application so ensure it includes the language regarding NSF's and the security deposit.

Charge the applicable application fee(s) manually. This can be paid in person or over the phone with a check, money order, or credit card.

Go to the Screening page (go to Actions, then click Screening).

Click on Applicants on the screening page and click the existing roommate's name. Update any new information from their new, paper application. Do this for all existing roommates.

Upon completion and review of applications and payment of application fees, screen all roommates together.

Keep all paper applications in a binder in a secure location in the leasing office.

Upon a screening acceptance, take the following steps prior to generating the roommate release form:

- Click the Roommates tab
- Find the roommate who is being released, and click 'Edit'
- The 'Lessee' flag should remain checked
- Clear the ''Move Out' date – this will only be filled out once the roommate as signed the release (this field is located under the Custom Data tab)
- The 'Move Out Reason' should be 'Released'
- 'Scheduled Move Out Date' should be entered the current day or in the future – click Save

Generate the roommate release form from online documents. Do this by clicking:

- Documents
- Online documents
- Select roommate release form
- Preview and print for wet signatures
- To send for online signature; preview and generate

Roommate release form must be signed by all leaseholders and countersigned by property representative.

Electronic sign forms will automatically be attached. Wet signature forms should be scanned and attached.

- After the release is signed, click the Roommate tab, find the roommate who is being release, click 'Edit'
- Reenter the 'Move Out' date; this should match the signed release form.
- Make sure 'Lessee' box is unchecked

- Have all applicable residents sign the release, then upload the completed document once countersigned

Adding a Non-Resident Lessee

When adding Non-Resident Lessee in Voyager, you must enter a lease from **AND** lease to date.

Non-resident lessees can only be added in Voyager/maintained in CRM.

The Lease From is a required system field.

The Lease To is required for the non-resident to be processed in CRM.

If the lease to date is left blank, you will get an error message in CRM.

Promoting a Roommate

1. Run the applicable screening for the remaining roommate(s). If approved, follow the below.
2. Go to the resident screen
3. From the top tool bar, click the three dots on the right hand side
4. Click Actions
5. Click Promote Roommate
6. Click the Roommate to Promote drop down box and select the roommate who will be promoted
7. Type in the move out date as the current date or future date, UNLESS you are trying to print the form immediately. If that is the case, you will need to enter the move out date as yesterday's day (unless the prior day is a Sunday, then you will have to use Saturday's date).
8. Enter the move out reason
9. Enter the agent
10. Click 'Submit'
11. Don't change any of the custom data, Click 'Review and Post'
12. Click 'Post Promotion', click 'OK'
13. Click the Search button at the top of your screen and search for the new primary resident- refreshing the screen will not work. Click the new primary resident.
14. To print the roommate release, click the Roommates tab again
15. Find the roommate who is being released, and click 'Edit'
16. The 'Lessee' flag should remain checked
17. Clear the ''Move Out' date – this should only be filled out once the roommate as signed the release (located under the Custom Data tab)
18. The 'Move Out Reason' should be 'Released'
19. 'Scheduled Move Out Date' should be entered the current day or in the future – click Save

20. Generate the form for signatures under Online Documents.
21. After the release is signed, click the Roommate tab, find the roommate who is being release, click 'Edit'
22. Reenter the 'Move Out' date; this should match the signed release form.
23. Make sure 'Lessee' box is unchecked
24. Have all applicable residents sign the release, then upload the completed document once countersigned

On Site Transfers

You do not have the ability to use the transfer function in CRM. Create a new guest card for resident who will be transferring and assign it to the unit they will be moving into. Proceed with normal screening and lease creation procedures. They will be able to apply and pay fees online.

Notice to Vacate Forms

Prior to printing the NTV vacate form, you should update the notice to vacate information on the Notice to Vacate Information tab under the Profile tab.

Forms are available in CRM under Reports/NTS Reports/NTS Forms.

Property/Unit/Tenant Name fields are required.

Once you enter the unit, the names will auto populate in the Resident field.

The NTV form cannot be electronically signed.

Once the NTV form is signed by ALL leaseholders and returned, check the notice information in CRM and upload the NTV form into CRM.

This form is usually used as an acknowledgement that a notice to vacate has been received.

Please continue to accept notices that are not submitted on the NTS form, but are turned in with all lessee's signatures.

Renewals

All renewals should be processed in CRM (not in Yardi/Voyager)

Lease Renewal Proposals are handled differently in CRM

You can have multiple approved lease renewal proposals.

You should no longer edit/change an approved proposal.

Once a lease renewal proposal has been approved, it should not be changed.

Any changes should be handled by cancelling the original proposal and creating a new lease renewal proposal.

To create the renewal lease with the new proposal, select the appropriate approved lease renewal proposal.

Once a lease renewal proposal is selected, any other lease proposals become "inactive"

Select 'Manage lease' to generate the new lease.

Only the selected lease renewal proposal will be used to generate the renewal lease.

After you complete the Countersigning process, go to the Renewal Proposals screen.

If the renewal is scheduled, you will see the 'Tenant has a scheduled renewal…'

If not, you will still see it on the screen. Then just select 'Renew'.

If MTM is processed before the renewal is executed (countersigned and completed) ; The MTM function cancels the in-progress renewal.

- **Month to Month:**

If you put someone on month to month, generate a proposal for them, and then the month to month goes into effect- the proposal is voided out. You have to create a new proposal, regenerate the lease, and resend to get signed if the lease was sent out.

<u>**Screening Results:**</u>

- **Approval** – Click approve in CRM
    - After clicking the 'Approve' button in CRM, the earnest deposit (standard security deposit and reservation fee) will automatically be charged and paid via the primary applicant's original method of payment (what was used for the application fee)- <u>do not approve applications in Voyager</u>
- **Conditional Acceptance - Security Deposit**
    - Applicant agrees to conditional security deposit
        - Charge the conditional security deposit (this will need to be collected in a separate payment transaction from the standard security deposit & reservation fee). Use charge code: apcondep
        - Approve the application. The earnest deposit will be withdrawn as stated above.
    - Applicant does <u>not</u> agree to conditional security deposit
        - Deny the application
- **Conditional Acceptance – Guarantor**
    - *Applicant agrees to guarantor
        - Property enters guarantor name and email address in occupant/roommate screen

    - Flag as ‘Lessee’ and ‘Adult’
    - Property must manually charge the guarantor application fee
        - Please use the charge code: apguaraf
    - Property invites guarantor to Rent Café
    - Guarantor must register account, complete application, upload proof of income and pay application fee
        - Property needs to verify income and review application
        - Verify payment for application has processed (may show as pending)
        - Go to Screening –
            - Exclude all other applicants (mark as Inactive)
            - Process Guarantor screening
            - Approve or Deny guarantor based on screening results

*The same process applies for a roommate addition during the course of a lease term

<u>Checkpoint Messages</u>

1. Review the checkpoint message and rectify it. If there is a SSN question, please submit a Help Desk ticket. Please do not include the SSN.
2. Click Activities in the left hand column on the guest screen
3. Click the Add Activity tab
4. Choose the Type dropdown as Follow up
5. Choose the agent as the property manager
6. Choose Contact Type as Any
7. Manually fill in the Follow-up Type as Checkpoint Message
8. Manually fill in the Notes section as Checkpoint Message and how it was rectified
9. Make the due date and time the same day, and the due to as immediate
10. Click Save
11. The property manager should then get a follow-up in their queue and will need to verify the checkpoint has been rectified
12. The property manager should type in the notes section that it was completed, and put initials
13. Click Complete and Save

<u>ACH Forms</u>

Forms are available in CRM under Reports/NTS Reports/NTS Forms and available in the Resident Profile. The resident profile ACH forms are blank and will need to be filled in accordingly.

Property/Unit/Tenant Name fields are required.

Once you enter the unit, the names will auto populate in the Resident field.

The ACH forms cannot be electronically signed.

Once the ACH form is signed and returned, submit paperwork to Property Manager or Assistant Manager to be submitted.

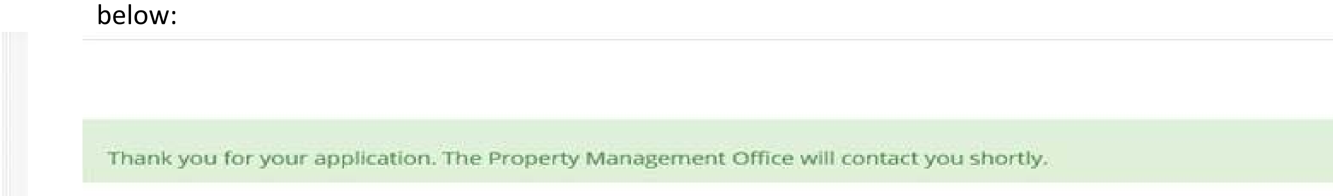
<u>One Time Credit Card Payments</u>

1) This is processed in Yardi Voyager, not CRM.
2) Choose NTS Multi-Family Role
3) From the side menu, choose ‘Payments’.
4) Choose ‘One Time Credit Card Payment”.
5) Enter Property code.
6) Enter Unit #.
7) Click on the ‘Payer’ box. Search for the Applicant/Resident name or code.
8) Select the appropriate applicant/resident and click ‘Ok’. You will notice the information for the Applicant/Resident will be displayed.
9) ‘Date received’ box will default to current date. Do not change this.
10) Select ‘Display Type’ as Standard Receipt
11) ‘Payer Name’ field will now appear; Do Not Enter anything in this field, it should remain blank.
12) Select ‘Enter Detail’. The distribution lines and payment amounts will appear.
13) Select ‘Preferred Payment Type’; Credit or Debit.
14) ‘Existing Cards’; this should remain blank; we are not keeping any credit/debit card information on file.
15) Enter the Total Amount.
16) ‘Post Month’ will default to current month.
17) ‘Exclude Service Fee?’ will default to Yes.
18) Select the items you want to pay in the distribution lines below.
19) Click ‘Save’. This will open another window in which to fill out the Credit Card Info.
20) Enter the Applicant/Resident credit card info. Click ‘Submit’
21) You will need the billing address for the credit card holder to process.

<u>Waitlist Procedures:</u>

<u>If the applicant contacts the Property via PORTAL or is a WALKIN:</u>

1) Verify that the prospect has an email address.
2) Navigate to Select Unit. Assign the Waitlist to the Prospect (you must first select it as a ‘Show’)
3) Save and Continue thru Rental Options.
4) Click on Application Charges. Post the charges
5) Invite to Rent Café
6) The Applicant will be able to fill out their Application ONLINE. The will get a notification like below:



7) Once the applicant is finished, you will see their status as ‘Applied’ in the ‘Application’ workflow.
8) You will need to contact the resident about payment of their charges.

<u>If the applicant creates their own login via PORTAL:</u>

1) They will send you a message of some sort, email or call
2) Contact the resident and discuss the options. Update their Preferences as needed.
3) Assign the Applicant to Waitlist.
4) The Applicant will NOT be able to apply ONLINE for the Waitlist. You will have to manually apply them.