



City of Toronto System Guide for Voyager

September 2026

Table of Contents

Introduction to City of Toronto Systems – Voyager	5
Key Terms	5
RGI Administration.....	7
How to Search for a Tenant Record	7
Certificates.....	7
Move In Certificates	7
Certificates Memo	7
Updating and Completing a Certificate	8
Annual and Interim Review Certificates (AR/IR).....	8
Annual Review – Overdue/Incomplete Package.....	9
Re-Opening Certificates.....	9
Overriding of RGI Rent Amount	9
Non-RGI Allowances (RGI-MSA Only)	9
RGI Review Document - Rent Worksheet	10
Non-RGI Charges	10
Supporting Documents.....	10
Overhoused Households.....	10
Swapping Heads of Households	10
Notice of Decision – Loss of Eligibility	11
Request for a Rent Review (Non NOD-LOE)	11
Vacancy Management - Allocation of RGI Vacancy/Subsidy.....	12
Subsidy and Vacancy Tracking Table	12
Market Rent Increases.....	13
Market Rent Decreases	13
Excluding and Un-Excluded Units from Voyager	13
Placing a Unit on Notice (Move-Out).....	14
Adjusting and Cancelling Move-Outs	15
Filling a Vacant Unit (Add Client).....	15
Posting a Move In	15
Adjusting a Move In Date	15
Canceling a Move In	16
Unit Status in Voyager	16
Unit Transfer for Non-Priority Internal Transfers.....	17
Reports	17
	2

Appendix: System Steps	20
How to search for Resident by Tenant ID	20
How to search for a tenant by Name	21
How to search for a tenant by Property and Unit	22
How to Add a Tenant and Create MI Certificate	23
How to Complete a Move in Certificate	24
How to Perform an Annual/Interim Review	25
How to create the Initial Certificate for Existing Tenants.....	26
How to add/update a new Household member.....	27
How to delete a Household Member	28
How to Swap a Head of Household.....	29
How to Add/Update an Additional HouseHold Info Record	30
How to Add/Update an Income Record	31
How to Delete an Income Record.....	32
How to Add/Update an Asset Record	33
How to Delete an Asset Record	34
How to Add/Update a Certificate Memo	35
How to Complete an RGI Certificate	36
How to Re-Open a Certificate	37
How to download the RGI Review.....	38
How to Upload an Attachment to a tenant record	39
How to post a Move In	40
How to Adjust a Move-In Date.....	41
How to Adjust an RGI Effective Date.....	42
How to cancel a Move-In.....	43
How to place a unit on Notice.....	44
How to Edit a Unit's Date Available	45
How to Add/Update the SVT Record.....	46
How to Adjust Move Out Date	47
How to Cancel a Move Out	48
How to Log a Notice of Decision – Loss of Eligibility	49
How to log an LOE Request for Review	50
How to perform a Unit Transfer	51
How to Perform an Override in an RGI certificate.....	52
How to Add Non RGI Charges	53

How to Exclude a Unit.....	54
How to Un-Exclude a Unit	55
How to Perform a Unit Rent Increase	56
How to Perform a Unit Rent Decrease	57
How to Create the Certificates Done Report	59
How to Create the Certificates Due Report	60
How to Create the LOE Report.....	61
How to Create the Overhoused Report	62
How to Create the Move-In Report	63
How to Create the Move-Out Report	64
How to Create the Unit Report	65
How to Create the Vacancy Report.....	66
How to Create the Validation Report	67

Introduction to City of Toronto Systems – Voyager

The City of Toronto System Guide -Voyager (CoT-Voyager) is the primary resource for Housing Providers who administer a benefit program on behalf of the City of Toronto within CoT-Voyager. This guide provides an overview of the business processes and step-by-step directions on how to perform tasks in Voyager for the purpose of ongoing program eligibility including building inventory and benefit/program ratio management.

Voyager will be used to:

- Access reports
- Add new properties and units
- Create vacancies
- Manage program ratios
- Perform Annual and Interim reviews
- Perform Rent Calculations
- Update unit statuses

For Rent-Geared-to-Income (RGI) / Rent-Geared-to-Income Max Shelter Allowance (RGI-MSA) policies, administration rules and procedures, housing providers must reference the current versions of the online administration manuals, [City Guidelines](#).

Key Terms

Term	Description
Post	Function used to finalize move in / move out process and update unit statuses.
Certificate	A record used to initiate a: Move-In, Annual Review, and/or Interim Review process. This record will be used to enter all relevant data required to complete a Review, resulting in a Rent Calculation.
Excluding from Voyager	Inactivating a unit in Voyager and removing the RGI administration access
RGI-MSA	Rent-Geared-to-Income - Max Shelter Allowance.
Resident	Same as a tenant
Market Rent Units	Units that are not under RGI/RGI-MSA program and are included in Voyager's inventory for the purpose of managing building target
Family Group	Represents how the Household Member are grouped by number as a family/benefit unit
Rent Profile	The Rent Profile determines how Voyager will calculate the RGI rent portion
RGI Review	The summary of a review that displays all information entered into a certificate. The RGI Review replaces the City of Toronto Worksheet and should be distributed to Tenants when a Rent Review is completed

Other Charges/Non RGI Charges	Charges for services provided by a Landlord to a Tenant that are outside of RGI administration. For example: parking, lockers, etc.
RGI-Maximum Shelter Allowance/ Allowances	Allowances given to eligible tenants who are under the RGI-MSA program and are in receipt of a Benefit (OW/ODS)

RGI Administration

How to Search for a Tenant Record

A Tenant record can be search in four different ways, by Property and Unit, by Name and by Tenant ID.

Refer to:

- [How to search for a tenant by Property and Unit](#)
- [How to search for a tenant by Name](#)
- [How to search for Resident by Tenant ID](#)

Certificates

There are three (3) types of **Certificates**.

Certificates in Voyager are created at the initial **Move In** (MI) and at anytime that a review of the Household is required, in an **Annual review** (AR) or **Interim Review** (IR). A Housing Provider must complete a certificate to calculate RGI rent.

Move In Certificates

Once a tenant record has been created in Voyager (Add Client) Housing providers will need complete a MI certificate (initial review) in order to calculate the RGI rent amounts.

Refer to: [How to complete a certificate](#)

[How to Upload an Attachment](#)

Certificates Memo

There can be multiple outcomes that stem during the Annual or Interim Review process, such as:

- A tenant requesting a review of rent calculation
- An Annual or Interim review not being completed due to an incomplete package
- An NOD issued due to the results of the Annual or Interim review, including a Notice of Decision – Overhoused

These outcomes are noted in the Memo found within the Certificates.

Refer to: [How to Add/Update a Certificate Memo](#)

Updating and Completing a Certificate

A certificate must be created and completed for RGI rent to be calculated. The following information must be entered:

- Effective dates
- Family members information
 - Family grouping
 - Rent Profiles
- Income for all family members over the age of 16
- Assets (if applicable)

Completion of a certificate will result in an RGI rent calculation.

All relevant documentation to support the review process must be uploaded into the Tenant file.

Refer to:

- [How to update the RGI summary](#)
- [How to Add/Update a Household Member](#)
- [How to Delete a Household Member](#)
- [How to Add/Update an Income Record](#)
- [How to Delete an Income Record](#)
- [How to Add/Update an Asset Record](#)
- [How to Delete an Asset Record](#)
- [How to add Non-RGI Charges](#)
- [How to Complete an RGI Certificate](#)
- [How to complete Additional Household Info](#)
- [How to Upload an Attachment](#)

Annual and Interim Review Certificates (AR/IR)

When conducting Annual Review or IR for an existing tenant that does not have a MI Certificate, an initial certificate must be created in order for the Annual Review or Inyear review to be completed.

Refer to:

- [How to Create the Initial Certificate](#)
- [How to Perform an AR/IR Certificate](#)
- [How to Complete and RGI Certificate](#)

Annual Review – Overdue/Incomplete Package

There may be instances where an Annual Review is not completed by the Effective date. When this occurs, an AR certificate and Memo must be created to explain why the annual review has not been processed.

For example:

- supporting documents have not been received
- annual review has not been returned

Refer to: [How to create/update a certificate memo](#)

Re-Opening Certificates

When an administrative error has been identified on a certificate a correction must be made. To correct the certificate, you must first determine if the certificate has a **View** or **Edit** status under the Tenant Screen.

If the certificate has an **Edit** status you can make the necessary corrections by going into the certificate from the Tenant Screen. If the certificate has a **View** status, corrections must be done through reopening the certificate.

Refer to: [How to Re-Open a Certificate](#)

Overriding of RGI Rent Amount

An override can only be performed to adjust the RGI rent amount when performing an IR for a Household that doesn't qualify for a rent reduction (refer to [RGI Manual](#) for regulations regarding rent reductions) . Overrides notes are mandatory and must explain the reason for the override.

For RGI Administration Overrides will only be used for Tenant Rent amounts

Refer to: [How to Perform an Override in an RGI Certificate](#)

Non-RGI Allowances (RGI-MSA Only)

Under the RGI-MSA program, households who are in receipt of a benefit (OW/ODSP) are eligible for specific allowances. These allowances will be deducted from the tenant rent amount. Refer to the RGI/MSA Rent Calculation Guide for more information.

Refer to: [How to Create Non-RGI Allowances](#)

RGI Review Document - Rent Worksheet

The RGI Review document is a summary of a review that has been completed. It outlines the family group(s), household income, utility charges or allowances and RGI rent amount. Upon completion of a certificate, the RGI Review document can be downloaded and distributed to tenants.

Refer to: [How to download RGI review](#)

Non-RGI Charges

A landlord may charge an RGI tenant for services provided that are outside of RGI administration. The Non-RGI Charges are :

- Parking
- Locker/Storage
- Cable/Internet/Security
- Fees/Dues
- Other

Non-RGI Charges are, if applicable, setup at the initial move-in and updated at the Annual Review stage. These charges will be included in the RGI document.

Refer to: [How to create Non-RGI Charges](#)

Supporting Documents

All document used to support on-going eligibility or Notice of Decision(s) must be uploaded into the tenant file.

Refer to: [How to Upload Attachments](#)

Overhoused Households

Once a household has been deemed as overhoused, housing provider must update the Additional Housing Info table to identify the household as being overhoused. The Notice of Decision – Overhoused must be uploaded into the tenant file and a certificate memo created.

Refer to: [How to Add/Update an Additional Household Info Record](#)

Swapping Heads of Households

If a member with a relationship code of Head of Household must be deleted, you must first swap relationship with another family member withing the household. Once the

relationship has been successfully swapped, only then can the family member be deleted from the household. Head of Household must be 16 years of age and older.

Examples where the Head of Household needs to be deleted:

- Vacating the Unit
- Is deceased

Refer to:

- [How to Swap a Head of Household](#)
- [How to Delete a Household Member](#)

Notice of Decision – Loss of Eligibility

When a Tenant/Household has been found to no longer be eligible for a RGI Subsidy, a Notice of Decision – Loss of Eligibility (NOD-LOE) is issued. Housing Providers must update the Provider LOE Detail table to identify Households that have received a NOD-LOE.

This table will assist Housing Providers on managing their NOD-LOE including tracking when a Request for Review is initiated and the outcome. When populating the Provider LOE Detail table, you must choose the primary reason for issuing the NOD-LOE followed by the secondary reason, if applicable.

Once the NOD-LOE has been issued and the Certificate of Service is completed, both documents must be uploaded into the Provider LOE Detail table as supporting documentation.

Refer to: [How to Create a Notice of Decision – Loss of Eligibility](#)

Request for a Rent Review (Non NOD-LOE)

Anytime a Notice of Decision is issued, a household member can request for a Review. If a Request for Review is received, the Housing Provider must enter create a certificate memo recording the date of the request, details of the request and the outcome.

When the outcome results in a rent calculation change than a correction to the AR or IR certificate is required.

Refer to: [How to Create to Request for a Rent Review](#)
[How to use Correction Review function](#)

Vacancy Management - Allocation of RGI Vacancy/Subsidy

Before a housing provider can proceed to place a unit on notice, they must always refer to their targeting plan and make sure they are meeting their minimum RGI unit requirements. The targeting plan is an agreement between the City and a housing provider that details the required minimum number of units to be provided within Housing Services Act.

The targeting plan ensures that RGI assistance is made available to as many households as possible. Housing providers must maintain the minimum targets set out in the targeting plan. For example, if a building's targeting plan calls for a minimum of 55 RGI households but only 54 households are receiving RGI, the next Market Rent unit must be changed to an RGI benefit unit and fill next vacant unit with an RGI household. Housing providers must check their targeting plan every time they have a vacancy.

For more details on targeting plans, see the RGI Administration Manual & City Guidelines Allocation Methods for RGI. The City of Toronto is committed to ensuring that the RGI program fills vacancies and allocates subsidies effectively from the Centralized Waiting List, inclusive of the following allocation methods: direct allocation or choice-based. Within direct allocation, there are three specific methods, including internal transfers, market rent to RGI (in-situ process) and referral agreements. Based on their targeting plan, housing providers must identify which allocation method they are intending to use to either distribute an available RGI subsidy or fill a vacant RGI unit, before placing a unit on notice in Voyager.

Subsidy and Vacancy Tracking Table

The Subsidy and Vacancy Tracking Table (SVT) is used to track the benefit type that is attached to a unit. The benefit type of a unit will determine if a vacant unit will become a vacancy to be filled in RentCafe. This will also assist the provider in ensuring compliance with their targeting plan by identifying number of market rent vs RGI units.

When units are created in Voyager a benefit type will be allocated to the unit. All units (Market and RGI) must have a Benefit Type identifier. There are four types of Benefits in Voyager

- AFF- Affordable (Do not use)
- INTSUB – Internal Subsidy
- MKT – Market
- RGI- RGI
- RGIMSA- RGI Max Shelter Allowance
- RGITOMKT – RGI Transitioning to Market Rent

When a unit becomes vacant, a housing provider will need to decide/confirm that the unit benefit type is correct. From time to time a provider will need to update the benefit type from Market to RGI (In-Situ) or RGI to Market to meet targeting numbers. If a benefit type of a unit is MKT, upon becoming vacant, the unit will be updated in RentCafe as “Occupied not Available” and will not be able to be filled and must be Excluded from Voyager.

In a situation where a unit is changing from RGI to Market Rent, during the time in which the unit is Vacant until it is filled by a Market Rent Tenant, the SVT benefit type for the unit must be updated to RGITOMKT - RGI Transition to Market Rent. SVT benefit type RGITOMKT will ensure the vacancy does not get filled in RentCafe. Once the unit has been filled by a Market Rent Tenant, the benefit type will then be updated to MKT-Market and Excluded from Voyager.

For Market Rent units that are changing to RGI, the unit must be Reinstated in Voyager in order for the vacancy to be filled in RentCafe.

Refer to: [How to Add/Update the SVT Record](#)

Market Rent Increases

The Unit Rent Increase function will calculate a new rent for a unit by applying either a flat dollar amount or a percentage to the current unit rent. Because rent increases happen in the future, housing providers will need to schedule the rent increases prior to effective dates. This will ensure the units’ market rent amounts are current.

Refer to: [How to Perform a Unit Rent Increase](#)

Market Rent Decreases

There may be instances where the current Market rent amount for a unit must be decreased. Market rent decreases cannot be done retro-actively. The effective date of the decrease must be the current date or a future date.

Refer to: [How to Perform a Market Rent Unit Decrease](#)

Excluding and Un-Excluded Units from Voyager

When a unit has a benefit type of Market, the unit must be excluded from Voyager’s active inventory. The unit will still be visible in Voyager but will not be able to conduct any RGI administration, including filling it, if its vacant. When a Market unit becomes an RGI unit, the unit must be included in Voyager’s active inventory by reinstating it.

Refer to:

- [How to Exclude a Unit](#)
- [How to Un-Excluded Unit](#)

Placing a Unit on Notice (Move-Out)

When a Notice to Vacate is received from a tenant, the unit can be placed on Notice based on the move out date from the Notice to Vacate. The provider will then conduct the unit inspections and determine when the unit will be ready to be occupied. Once the provider determines the date when the unit will be ready for occupancy, the Date Available can be added to the unit.

Refer to:

- [How to Place a Unit on Notice](#)
- [How to Edit a Unit's Date Available](#)

The unit can now be offered to an applicant.

Adjusting and Cancelling Move-Outs

There are times when tenants may need to change the Move-Out date or cancel their Notice to Vacate notice.

Once the housing provider has a new Move-Out date, the move out date will have to be updated.

If the tenant is cancelling their Notice to Vacate, the notice will be to be cancelled.

Refer to:

- [How to Adjust Move-Out Date](#)

Filling a Vacant Unit (Add Client)

When an applicant has accepted an offer of a unit, the vacant unit must be populated with the applicant information. A Tenant Id will be created. Once the ID has been created you can proceed to

- Add the RGI tab
- Complete the initial RGI certificate

Refer to:

- [How to Add a Tenant and Create MI Certificate](#)

Posting a Move In

After the MI certificate is complete, the **Status** of the tenancy must be updated from Future to Current. This will update the **Voyager Status** to Occupied-No Notice in RentCafe.

Refer to: [How to Post a Move In](#)

Adjusting a Move In Date

Prior to the effective date of the scheduled move in, the move in date can be adjusted. When adjusting the move in date the RGI summary effective date must also be updated. The move in date and RGI effective date must always match.

Refer to:

- [How to Adjust a Move In Date](#)
- [How to change the RGI effective date](#)

Canceling a Move In

A Housing Provider can be alerted by the applicant that the applicant will not be moving in due to a variety of reasons. A move in can only be cancelled if the move in date has not yet passed.

Note: If the move in date has taken effect, under the RTA the applicant is now a tenant. A move out must be completed.

Refer to: [How to Cancel a Move In](#)

- [How to Cancel Notice](#)

Unit Status in Voyager

In Voyager, a unit has two types of statuses – one for the Unit, one for the Tenant. A Unit status refers to the Unit's current availability and a Tenancy status that refers to a Tenant's occupancy status.

The unit status is updated when the following actions are performed:

- Excluding a Unit
- Posting a Move-In
- Performing a Move-Out

The below table provides an explanation for each Unit status

Status	Unit Description
Excluded	Unit is not RGI (Market rent)
Occupied No Notice	Unit is occupied
Notice Unrented	Unit is placed on notice and is not rented
Vacant Unrented Not Ready	Unit is vacant not accepted. Maintenance not complete
Vacant Rented Not Ready	Unit is offered and accepted. Maintenance not complete

The below table provides an explanation for each Tenancy status

Status	Unit Description
Future	Unit has been populated with the tenant's information and move in dates. Move in has not been posted
Current	Move in has been posted and tenant is currently occupying the unit
Notice	Unit has been placed on notice
Past	Past tenant of a particular unit

Refer to:

- [How to Exclude a Unit](#)

- [How to UnExclude Unit](#)
- [How to Post a Move In](#)
- [How to Place a Unit on Notice](#)

Unit Transfer for Non-Priority Internal Transfers

When a tenant has been identified as having a Non-Priority transfer and the housing provider has a unit for the household to move into, if the Tenant does not have a Eligible applicant file in RentCafe then a Unit Transfer process will have to be done in order to move the tenant. If the Tenants has an Eligible application in RentCafe then follow the same process as a direct allocation.

Refer to: [Internal Unit Transfer](#)

Reports

Voyager contains multiple reports that can be used to provide insight and operational support into Tenants, Units, and Vacancy management. All reports can be downloaded to Excel for filtering or as required. The reports include:

- **Certificates Done** – List of all done certificates for a Tenant. A Certificate is considered done when the completed box in the Certificate's RGI Summary box is checked off and the supporting documentation has been uploaded to the Tenant file. This report can be created by choosing Property(s), Certificate effective date, and Certificate review type.

Refer to: [How to Create the Certificates Done report](#)

- **Certificates Due** – List of all Certificates that have an Next Annual Review date. Report can be created by Property(s) and by "Months Out". The report has a "Months Out" option of: Past Due, Due, or Next Year A/R. Certificates are considered "Past Due" when the Certificate has not been done by the Next Annual Review date. Certificates are considered "Due" if the Next Annual Review date is within 6 months. Certificates are considered "Next Year A/R" when the Next Annual Review date is more 6 months away. Certificates are considered done when the Certificate has been checked completed, and the relevant documentation has been uploaded.

Refer to: [How to Create the Certificates Due report](#)

- **LOE Report** – Lists all LOEs that have been issued. Report can be used to monitor the different statuses of the LOEs (issued, rescinded, resolved, and in effect), identify LOEs that are missing supporting documentation, Tenants who have requested a review, and the respective review decision.

Refer to: [How to Create the LOE report](#)

- **Move-In Report** – List of all Tenants who accepted the vacancy and have been submitted to Voyager through the RentCafe offer process. Once the Move-In Certificate has been checked completed and the relevant documentation uploaded, the Certificate will be removed from the Move-In report and will display in the Certificate Due report base on the Next Annual Review date.

Refer to: [How to Create the Move-In report](#)

- **Move-Out Report** – List of all Units that have been placed on notice. This report can be used to determine if the benefit type of the vacancy is correct or needs to be updated. This will ensure that vacancies that must be filled through RentCafe will be synchronized to RentCafe.

Refer to: [How to Create the Move-Out report](#)

- **Overhoused Report** – List of all Tenants who have been identified as Overhoused in the Additional Household Info table. Report can be used to ensure that the overhoused process in RentCafe is completed.

Refer to: [How to Create the Overhoused report](#)

- **Unit Report** – List of all Units in the Provider's portfolio and ensure that all relevant information is current.

Refer to: [How to Create the Unit report](#)

- **Vacancy Report** – List of all vacant Units. This report can be used to identify discrepancies between Unit status and Benefit type - which may result in vacancies not appearing in RentCafe - ensure that all available dates are entered correctly and display vacancy delay reasons.

Refer to: [How to Create the Vacancy report](#)

- **Validation Report** – Provides an overview of all key tasks relevant to RGI administration in Voyager. Report can be used to ensure that all additional tables (Additional Household Info, LOE, SVT, etc.) are reviewed and updated as required during the Annual Review process. This report will only display tenants' records for which a certificate has been completed.

Refer to: [How to Create the Validation report](#)

- **RGI Information Report** – Provides an overview of RGI Tenant information alongside Household Income Limit (HIL) data. Report can be used to ensure that all households are within the HILs limit for their respective bedroom size.

Refer to: [How to Create the RGI Information Report](#)

Appendix: System Steps

How to search for Resident by Tenant ID

This process begins at the Voyager landing page

1. Menu box left hand side of screen
2. Click **Tenant>Review Tenant**
3. If fields are populated click **Clear**
4. Enter the Tenant ID in the **Resident** field
5. Click **Submit**

[Process ends](#)

How to search for a tenant by Name

This process begins at the Voyager landing page

1. Menu box left hand side of screen
2. Click on **Tenant>Review Tenant**
3. If fields are populated click **Clear**
4. In **Resident** field enter Tenant last and/or first name. System will display all possible matches.
5. Click on Tenant name, **Resident** field will populate with selected record
6. Click **Submit**

[Process ends](#)

How to search for a tenant by Property and Unit

This process begins at the Voyager landing page

1. Menu box left hand side of screen
2. Click on **Tenant>Review Tenant**
3. If fields are populated click **Clear**
4. In **Property Field** enter the property address. From the drop down click on the property address
5. In **Unit Field** enter the unit number. From drop down click on correct unit number
6. Click **Submit**
7. **Tenant** screen will be displayed

[Process ends](#)

How to Add a Tenant and Create MI Certificate

This process begins at the Voyager landing page

1. Menu box left hand side of screen
2. Click on Tenant>**Add Tenant**
3. Enter:
 - a. **Property ID** – Click the **Property ID** hyperlink. A list of Properties will appear. Select the Property that the Tenant will be moving into
 - b. **Unit ID** - Click the **Unit ID** hyperlink. A list of Units in the Property chosen will appear. Select the Unit that the Tenant will be moving into
 - c. **First Name** – The first name of the head of household that will be moving in
 - d. **Last Name** – The last name of the head of household that will be moving in
 - e. **Lease From Date** – Click the **Calendar** and select the date that the Lease begins
 - f. **Term (# of months)** – Set to 12
 - g. **Lease TO Date** – Will automatically populate
 - h. **Move In Date** - Click the **Calendar** and select the date that the Tenant will be moving in
 - i. **Rent** – The market rent amount for the unit will display
4. Click **Save**
5. Click **Save & Continue**. Tenant screen will display
6. Click on **Edit**
7. Check the **RGI Tenant** checkbox in the Lease Tab
8. Click **Save**
9. Click **RGI Tab**
10. Click on Blank **Page Button**.
11. Add RGI Certification window will appear
12. **Effective Date** – Click on the **Calendar** and select the date that the certificate takes effect
13. **Cert Type** – Click on **MI** type from the drop down
14. Click **Next**
15. RGI screen will appear, proceed with completing the move in certificate.

[Process ends](#)

How to Complete a Move in Certificate

This process begins from RGI Summary screen once the MI certificate has been created

System Steps

1. Under the RGI summary tab:
 - a. Review and update the **Effective Date** to reflect that day the subsidy begins
 - b. Next Annual Review – If the Effective date is not the first day of the month (mid-month move in) update **Next Annual Review** to reflect when the next annual review date will be performed on
2. Click on **Family Member** Tab
 - a. Edit/Add Family Members (see: [How to Add/Update a Family Member](#))
3. Click the **Income** tab
 - a. Add Income Records (see: [How to Add/Update an Income Record](#))
4. Click on **Asset** Tab
 - a. Create Asset records for each family member (see: [How to Create an Asset Record](#) or [How to Update an Asset Record](#))
5. Click on **Validation** Tab and correct all errors as listed
6. Return to the **RGI summary**. If all information is correct, check off **Complete** box
7. **Date Completed** will auto populate.
8. Click **Save**
9. Click **Close**
10. Click the **Functions** tab, click **Move In**
 - a. Click on **Post** (see: **How to post Move In**)
 - b. Tenancy Status will now reflect Current (C)

[Process ends](#)

How to Perform an Annual/Interim Review

This process starts from the Tenant screen

System Steps

1. Click **RGI Tab**
2. Under the most recent **Cert Type** click either the **Annual or Interim Review** button to reflect the certificate that is required
3. Pop Up window will appear. Click **OK** to proceed
4. **RGI** screen displays
 - a. For AR – Update **Effective Date** if applicable
 - b. For IR - Enter IR **Effective Date** and click on **Save**
5. Update the **Family Member** tab
 - a. See: [How to add/update Family Members](#) and/or [How to delete a Family Member](#)
6. Update the **Income** tab
 - a. See: [How to add/update an Income record](#) and/or [How to delete an Income Record](#)
7. Update the **Asset** tab
 - a. See: [How to add/update an Asset record](#) and/or [How to delete an Asset Record](#)
8. Click on **Validation Tab** and correct all errors as listed
9. Return to the **RGI Summary** , If all information is correct, check off **Complete** box.
10. Date Completed will auto populate.
11. Click **Save**
12. Click **Close**
13. If required, create/update the **Additional Household Info** (see: [how to populate/update the additional household info](#))
14. If required, create/update the **Provider LOE Details** (see: [How to populate Provider LOE Details](#))

[Process ends](#)

How to create the Initial Certificate for Existing Tenants

Note: The below system steps are only apply for existing tenants that need an IR or AR certificate to be initiated.

This process starts from the Tenant screen

System Steps

1. Click **RGI Tab**
2. Click on **Page Button**.
3. Add RGI Certification window will appear
4. **Effective Date** – Click on the **Calendar** and select the date that the certificate takes effect
5. **Cert Type** – Select the certification type from the drop down
 - a. **AR - Annual Review**
 - b. **IR - Interim Review**
6. Click **Next**
7. RGI screen will appear, proceed with completing the applicable certificate (see: [How to Complete an Annual/Interim Review](#))

[Process ends](#)

How to add/update a new Household member

This process begins from the tenant screen

System Steps

1. Click **RGI Tab**
2. Click **Edit** on the most recent RGI certificate
3. If the Certificate Status is **View** (see: [How to Correct a Certificate](#))
4. Click the **Family Members** tab

Adding a Household Member

- a. Click **Page** Icon. The **Add New Member** page will appear. Enter:
 1. **Member Type** – Select the appropriate description using the drop down arrow
 2. **Last Name** – Enter the Last Name of member
 3. **First Name/MI** – Enter the First Name and the Middle Initial of the member if applicable
 4. **Gender** – Select the appropriate description using the drop down arrow
 5. **Birth Date** – Click the Calendar and select the Household member's birthday or enter manually using MM/DD/YYYY format
 6. **Relationship** – Select the appropriate description using the drop down arrow
 7. **Senior** – Select **Yes** using the drop down arrow if family member is over 59 years of age
 8. **Citizenship** - Select the appropriate description using the drop down arrow
 9. **Family group** – Select the appropriate description using the drop down arrow
 10. **Rent Profile** – Select the appropriate rent calculation description using the drop down arrow
 11. Click **Save**

Editing a Household Member

- a. Click **Edit** for the applicable family member. **Edit Family Member** screen will appear.
- b. Update fields as required
- c. Click **Save**

[Process ends](#)

How to delete a Household Member

Note: A Head of Household cannot be deleted. To delete a Head of Household, you must assign the Head of Household to another household member, swap the Head of Household then delete (see: How to swap a Head of Household)

This process begins from the tenant screen

System Steps

1. Click **RGI Tab**
2. Click **Edit** on the most recent RGI certificate
3. If the Certificate Status is **View** (see: [How to Correct a Certificate](#))
4. Click the **Family Members** tab
5. Click **Delete** on the Household member to be deleted
6. A pop-up will appear to confirm deletion.
7. Click **Ok** to delete
8. Record will be removed from Family Member Tab

[Process ends](#)

How to Swap a Head of Household

This process begins at the tenant screen

System Steps

1. Click the **RGI** tab
2. Click **Edit** under the most recent certificate.
3. If the Certificate Status is **View** (see: [How to perform a Correction Review](#))
4. Click the **Family Members** tab
5. Identify which family member will be the new Head of Household, Click **Swap HOH**. The New HOH information page will appear
6. Update the relationship(s) that the original Head of Household has with family members
7. Click **Save**

[Process ends](#)

How to Add/Update an Additional Household Info Record

This process begins from the tenant screen

System Steps

1. Click on **Data** tab
2. Click on **Additional Household Info**. The Additional Household Info table will appear
3. Enter or update:

RGI-MSA

- a. **Rent Profile – Max Shelter** – Select if a Household Member has a rent profile that is under RGI-MSA

Market Rent Due To Income

- a. **24-Mth Mrkt Rent Start Date** – Click the **Calendar** and select the date that the Household will begin Market Rent payments

Overhoused

- a. **Overhoused** – Select if the Household is Overhoused by using the drop down arrow
- b. **Overhoused Date** – Click the **Calendar** and select the date that the Household became Overhoused
- c. **Eligible Bed Size** – Select the Unit size that the Household is eligible for using the drop down arrow
- d. **Applicant Pcode** – Enter the Applicant Pcode given to the Household from RentCafe

Other

- a. **Provider Tenant ID** – Enter the Household's ID from the system the Household was previously located in
4. Click **Save**

[Process ends](#)

How to Add/Update an Income Record

This process begins at the tenant screen

System Steps

1. Click the **RGI** tab
2. Click **Edit** under the most applicable certificate
3. If the Certificate Status is **View** (see: [How to perform a Correction Review](#))
4. Click on **Income** tab

If adding a new Income Record

5. Click the **Page Button**
6. Enter
 - a. **Member** – Use the drop down list and select the Household Member the Income Record will apply to
 - b. **Income Type Code** – Click the **Hyperlink**. A list of Income Type Codes will appear. Select the Income Type that applies to the Household Member
 - c. **Payment Frequency** – Use the drop down list and select the how often the Household Member receives payment by their Income Type
 - d. **Income per Pay Period** – The amount the Household Member receives per Payment
 - e. **Earned Inc Allowance** – If the Household Member has a earned Income Type code, use the drop down and select if the Household Member receives a Family and Single Income Allowance
7. Click **Save**

If updating an existing Income Record

5. Click **Edit** on the respective member's name
6. Enter updated information
7. Click **Save**

[Process ends](#)

How to Delete an Income Record

This process begins at the tenant screen

System Steps

1. Click the **RGI** tab
2. Click **Edit** under the most applicable certificate
3. If the Certificate Status is **View** (see: [How to perform a Correction Review](#))
4. Click on **Income** tab
5. Click **Delete** on the respective member's name
6. A pop-up will appear to confirm deletion.
7. Click **Ok** to delete
8. Record will be removed from **Income** Tab

[Process ends](#)

How to Add/Update an Asset Record

This process begins at the RGI certificate screen

System Steps

1. Click the **Asset** tab

If adding an Asset Record

- a. Click on **Page** Icon. The **Add New Asset Record** page will appear. Enter:
 - i. **Member** – Select the member the asset information will pertain to (Asset records must be made for all household members over the age of 16)
 - ii. **Description** – A summary of the asset
 - iii. **Asset type** – Select “52-Non-income”
 - iv. **Market Value** – The monetary worth of the asset
 - v. **Annual Rate %** - Leave as “0.00”
 - vi. **Income/Month** – Leave as “0.00”
 - vii. **Transfer Date** – Do not enter any value
- b. Click **Save**

If updating an existing Asset Record

- a. Click **Edit** on the respective asset
- b. Enter updated information
- c. Click **Save**

[Process ends](#)

How to Delete an Asset Record

This process begins at the RGI certificate screen

System Steps

1. Click the **RGI** tab
2. Click Asset tab
3. Click **Delete** on the asset to be deleted. A pop up will appear
4. Click **Ok** to delete

[Process ends](#)

How to Add/Update a Certificate Memo

This process begins at the tenant screen

System Steps To Create

1. Click the **RGI** tab
2. Click **Edit/View** on the certificate that the memo will be added to
3. Click on **Other Data** tab
4. Click on **Memo**. Memo window will appear
5. If a Memo has already been created, it will appear, to create a new memo, click on **New** and proceed to number 6
6. **Date field** will be auto populated based on date the Memo was created using the Calendar, choose the date. If you are creating Memo for Notice of Decision Types, enter the date in which the Notice of Decision was issued to household..
7. **Time field** will be auto populated based on the time the Memo was initiated, using the Clock icon update the hour/minute if applicable
8. **Type**, using the drop down, choose applicable **Memo** type
 - a. **Rent Calculation Review Request** – When tenant requests a review of a Notice of Decision rent calculation
 - b. **Incomplete Package** – When an Annual Review is overdue because it wasn't received, or documents are missing
 - c. **AR/IR NOD Issued** – When the Notice of Decision for rent calculation has been issued
 - d. **NOD-Overhoused Issued** – When the Notice of Decision –Overhoused has been issued
9. **Status** – Progress of the Memo
10. **Result** – **To be used with Rent Calculation Review Request ONLY**. Using the drop down choose applicable result
11. **Agents** – blank
12. **Notes** – Add additional information pertaining to the Memo Type. For Memo Type Incomplete Package, state why Annual Review is overdue
 - a. Annual Review was not submitted or
 - b. Annual Review was submitted but supporting documents are missing
13. Click **Save**. Memo will appear at the top of page

[Process ends](#)

How to Complete an RGI Certificate

Note: If the **Complete** box is not checked off, a certificate will be considered incomplete and have a **View** status. Once the complete box is checked off, it will be considered completed and be updated from **View** to **Edit**.

This process starts from the Tenant screen

System Steps

1. Click **RGI Tab**
2. Click on **Edit** of the certificate to be completed
3. Check off the **Complete** box. Date Completed will automatically populate
4. Click **Save**

Process ends

How to Re-Open a Certificate

This process begins at the Tenant screen

System Steps

1. Click the **RGI** tab
2. Click **View** under the certificate that requires updating
3. Click the **Functions** tab
4. Click **Re-open**
5. Make all required changes
6. Click **Complete** in the RGI Summary screen
7. Click **Save**

[Process ends](#)

How to download the RGI Review

This process begins at the tenant screen

System Steps

1. Click **RGI Tab**
2. Click **View/Edit** on the certificate the RGI Review is relevant to
3. Click **Reports**
4. Click **RGI Review**
5. RGI Review will appear
6. From Icon on Ribbon using the drop down, click on **Program** to download the document (Word, PDF, Word)
7. RGI Review will be downloaded to the chosen program

[Process ends](#)

How to Upload an Attachment to a tenant record

This process begins at the tenant screen

System Steps

1. Click on **Data** tab
2. Click on **Attachments**. Attachments window will appear
3. Click **Upload**. A file search window will appear
4. After finding the document to be uploaded click **Save**
5. Using the drop down, select a type for the attachment
6. Description boxes can be edited by clicking on the description
7. Click **Save**

[Process ends](#)

How to post a Move In

Note: To post a Move In, the Move In process must be completed (see: [Completing a Move In](#))

This process begins at the tenant screen

System Steps

1. Click the **Functions** tab, click **Move In**
2. Click **Post**
3. Tenancy Status will now reflect as Current (C)

[Process ends](#)

How to Adjust a Move-In Date

Note: Adjusting a Move In Date can only occur if the tenant has a Future (F) status

This process begins at the tenant screen

System Steps

1. Click the **Functions** tab
2. Click **Adjust Move-In Dates**
3. Under Lease Dates update:
 - a. Move-In – Click the **calendar** and select the new Move In date
 - b. Lease From – Click the **calendar** and select the new Lease From date
 - c. Term – Select the term length (in months)
 - d. Lease To – Automatically calculates from the Lease From date in addition to the Term length
4. Click **Save**

[Process ends](#)

How to Adjust an RGI Effective Date

This process starts at the tenant screen

System Steps

1. Click the **RGI** tab
2. Click **Edit** of the most recent certificate
3. If the Certificate Status is **View** (see: [How to perform a Correction Review](#))
4. Update the **Effective Date**
5. Update the **Next Annual Review** to the first day of the month following the Effective Date
6. Check off **Completed** box
7. **Date Completed** will auto populate
8. Click Save

[Process ends](#)

How to cancel a Move-In

Note: Cancelling a Move In can only occur if the Move In date has not passed

This process begins at the tenant screen

System Steps

1. Click on Functions tab Click **Cancel Move-In**
2. Enter:
 - a. Property – Automatically populates to the current property
 - b. Unit – Automatically populates to the current unit
 - c. Tenant – Automatically populates to the current tenant
 - d. Cancel Date – Automatically populates to the current date. If the cancel date is a different date, click the **calendar** and select the new Cancel date
 - e. Reason – The circumstance why the tenant has chosen to not Move In
 - f. Agent – Leave as “NA”
3. Click **Save**

[Process ends](#)

How to place a unit on Notice

Note: To post a Move Out, the tenant must have a Current (C) Tenancy Status (see: [Completing a Move In](#))

This process begins at the tenant screen

System Steps

1. Click the **Functions** tab
2. Click **Notice**
3. Enter:
 - a. Termination Type – Under what circumstance is the notice being given
 - b. Notice Date – Click on the **calendar** and select the date the notice was provided either to the tenant or landlord
 - c. Move Out Date – Click on the **calendar** and select the date that the tenant will Move Out
 - d. Reason for Move Out – Provide the reasoning behind the Move Out
 - e. Post Early Termination Fee – Leave unchecked
4. Click **Save**
5. Tenancy Status will now reflect as Notice (N)

[Process ends](#)

How to Edit a Unit's Date Available

This process begins at the unit screen

System Steps

1. Click **Edit**
2. Under Occupancy tab, edit:
 - a. **Date Available** – Click the **Calendar** and select the date the unit will be available to be rented again
3. Click **Save**

[Process ends](#)

How to Add/Update the SVT Record

This process begins at the unit screen

System Steps

1. Click **Functions**
2. Click **SVT Unit Data**. The Subsidy & Vacancy Tracking History page will appear

If adding an SVT record

3. Click the **Paper** icon. The Detail page will appear
4. Enter:
 - a. **SVT Program** – Click the **SVT Program** hyperlink. A list of SVT program codes will appear. Select the appropriate SVT code
 - b. Click **Ok**
 - c. **Start/End Date** – Click on the **calendar** and select:
 - i. The start date if the tenant is changing to a different benefit type
 - ii. The end date if the tenant is no longer eligible for a benefit type
 - d. Click **Save**

If updating an SVT record

5. Click the **Edit** icon. The Detail page will appear
6. Update:
 - a. **SVT Program** – Click the **SVT Program** hyperlink. A list of SVT program codes will appear. Select the appropriate SVT code
 - b. Click **Ok**
 - c. **Start/End Date** – Click on the **calendar** and select:
 - i. The start date if the tenant is changing to a different benefit type
 - ii. The end date if the tenant is no longer eligible for a benefit type
 - d. Click **Save**

[Process ends](#)

How to Adjust Move Out Date

This process begins at the tenant screen

System Steps

1. Click the **Functions** tab
2. Click **Adjust Move Out Dates**
3. Enter:
 - a. Move Out Date – When the new Move Out date is
 - b. Reason for Move Out – Circumstances behind the Move Out
 - c. Post Early Terminate Fee – Leave unchecked
4. Click **Save**

[Process ends](#)

How to Cancel a Move Out

Notes: Canceling a Move Out can only be performed on a tenant that has been placed on Notice

This process begins at the tenant screen

System Steps

1. Click the **Functions** tab
2. Click **Cancel Move Out**
3. Tenancy Status will reflect a Cancelled (CN)

[Process ends](#)

How to Log a Notice of Decision – Loss of Eligibility

This process begins at the tenant screen

System Steps

1. Click the Data tab
2. Click **Provider LOE Details**. **Provider LOE Detail** table will appear
3. Enter:
 - a. **LOE Primary Reason** – Using the drop down arrow, select the primary reason for serving the LOE
 - b. **LOE Secondary Reason**- If applicable, using the drop down arrow, select the secondary reason for serving the LOE
 - c. **LOE Issue Date** – Click on the **Calendar** and select the date the LOE will be issued to tenant
 - d. **LOE Effective Date** – Click on the **Calendar** and select the date the LOE is to be take effect.
 - e. **LOE Status** – Using the drop down, select the progress of the LOE
 - f. **LOE Notice of Decision** – Using the drop down arrow, select the attachment that is the LOE Notice of Decision (see: [How to Upload an Attachment](#))
 - g. **LOE Certificate of Service** - Using the drop down arrow, select the attachment that is the LOE Certificate of Service (see: [How to Upload an Attachment](#))
 - h. **RFR Deadline** – Click on the **calendar** and select the last day to submit a Request for Review (30 days from Issue date)
4. Click **Save**

[Process ends](#)

How to log an LOE Request for Review

Note: A LOE Request for Review can only be done if a Notice of Decision – Loss of Eligibility has been logged (see: How to Log

This process begins at the tenant screen

System Steps

1. Click the Data tab
2. Click **Provider LOE Details**. **Provider LOE Detail** table will appear
3. Enter:
 - a. **RFR Request Date** – Click the **Calendar** and select the date that the tenant had submitted the Request for Review
 - b. **RFR Decision Date** – Click the **Calendar** and select the date the Request for Review Decision was made
 - c. **RFR Decision** – Using the drop down arrow, select the Request for Review's Decision
4. Click **Save**

[Process ends](#)

How to perform a Unit Transfer

This process begins at the tenant screen

System Steps

1. Click the **Functions** tab
2. Click **Unit Transfer**
3. Enter:
 - a. **To Property** – Click the **Hyperlink** to bring up a list of Properties, check off the applicable Property address the Household is moving into and click **OK**
 - b. To Property field will be populated
 - c. **To Unit** - Click the **Hyperlink** to bring up a list of available Units in the Property that was checked , check off Unit Household is moving into and click **OK**
 - d. To Unit field will be populated
 - e. **Notice of Transfer Date** – Click the **Calendar** and select the date the Household was given notice of the transfer
4. Click **Submit**
5. **Intended Move Out Date** field, using calendar, enter date Household will be vacating their current unit
6. **Transfer Reason**, using drop down click on applicable transfer reason
7. Click **Finish**
8. Click **Post Transfer**

[Process ends](#)

How to Perform an Override in an RGI certificate

This process begins at the RGI certificate screen

System Steps

1. From **the RGI Summary** Screen, check off the applicable **Override box** and populate fields as follows:
 - a. **Tenant Rent** – Enter the amount of rent the tenant is responsible to pay. Tenant Rent override is to be used with an IR certificate when a tenant does not qualify for a rent reduction (refer to [RGI Manual](#) for regulations regarding rent reductions). Enter Override notes
 - b. **Utility Allowance** – Enter the amount of the utility allowance and/or program allowances the tenant is eligible for. Utility Allowance override is to be used for tenants who are under the RGI-MSA program only. Tenant rent will be reduced by total amount of allowance. Enter Override notes
2. Click **Save**

[Process ends](#)

How to Add Non RGI Charges

This process begins at the RGI certificate screen

System Steps

1. Under the Charge Code and Other Charges section of the RGI Summary screen, enter:
 - a. **Rent Charge Code** – Leave blank
 - b. **1st Other Charge Code** – Click the **hyperlink** and select the applicable charge code
 - c. **Amount of 1st Charge** – Enter the amount associated with the first charge code
 - d. **2nd Other Charge Code** – Click the **hyperlink** and select the applicable charge code
 - e. **Amount of 2nd Charge** – Enter the amount associated with the second charge code
 - f. **3rd Other Charge Code** – Click the **hyperlink** and select the applicable charge code
 - g. **Amount of 3rd Charge** – Enter the amount associated with the third charge code
 - h. **4th Other Charge Code** – Click the **hyperlink** and select the applicable charge code
 - i. **Amount of 4th Charge** – Enter the amount associated with the fourth charge code
 - j. **5th Other Charge Code** – Click the **hyperlink** and select the applicable charge code
 - k. **Amount of 5th Charge** – Enter the amount associated with the fifth charge code
2. Click **Save**

[Process ends](#)

How to Exclude a Unit

This process begins at the unit screen

System Steps

1. Click **Edit**
2. Check **Exclude** Box. Box will now be checked and unit Excluded.
3. Click **Save**

[Process ends](#)

How to Un-Exclude a Unit

This process begins at the unit screen

System Steps

1. Click **Edit**
2. Uncheck **Exclude** Box. Box will now be unchecked.
3. Click **Save**

[Process ends](#)

How to Perform a Unit Rent Increase

This process begins at the Voyager landing page

System Steps

1. Menu box left hand side of screen, click **Unit Rent Increase>Unit Rent Increase Function**
2. Enter:
 - a. **Property** – Click the **Property** Hyperlink. A list of Properties will appear, select all of the Properties that will receive an increase
 - b. **Unit** – Click the **Unit** Hyperlink. A list of Units will appear, select all of the units that will receive an increase. Leaving this field blank will apply the increase to all Units in the Property(s) selected. Do not populate this field if the bedroom field is populated
 - c. **Bedroom** – Using the drop down, select the bedroom size that will receive the increase. Leaving this field blank will apply the increase to all bedroom sizes in the Property(s) selected. Do not populate this field if the Unit field is populated
 - d. **Amount** – Enter as a percentage of rent amount (2.5 entered represents 2.5%) or a flat dollar amount (10 entered represents \$10) that will be added to the current Unit Rent amount
 - e. **Type** – The type of increase that will be used (% of Rent or Flat \$ Amt)
 - f. **Effective Date** – Click the **Calendar** and select the date the Unit Rent increase will take effect
 - g. **Rounding** – Using the drop down, select Down
 - h. **Report Only** – Using the drop down, select the relevant option. Selecting “Yes” and click **Submit** will produce a report of the changes to be made. Selecting “No” will proceed with the Unit Rent increases
 - i. **Destination** – Leave as is
3. Click **Submit**

[Process ends](#)

How to Perform a Unit Rent Decrease

This process begins at the Voyager landing page

System Steps

4. Menu box left hand side of screen, click **Unit Rent Increase>Unit Rent Increase Function**
5. Enter:
 - a. **Property** – Click the **Property** Hyperlink. A list of Properties will appear, select all of the Properties that will receive a decrease.
 - b. **Unit** – Click the **Unit** Hyperlink. A list of Units will appear, select all of the units that will receive a decrease. Leaving this field blank will apply the decrease to all Units in the Property(s) selected. Do not populate this field if the bedroom field is populated
 - c. **Bedroom** – Using the drop down, select the bedroom size that will receive the decrease. Leaving this field blank will apply the decrease to all bedroom sizes in the Property(s) selected. Do not populate this field if the Unit field is populated
 - d. **Amount** – Enter as a percentage of rent amount (2.5 entered represents 2.5%) or a flat dollar amount (10 entered represents \$10) that will be subtracted to the current Unit Rent amount

Note: a negative sign in front of the percentage amount (-2.5%) or the flat rate amount (-2.00) must be entered in order for a decrease to be done.

 - e. **Type** – The type of decrease that will be used (-% of Rent or Flat - \$ Amt)
 - f. **Effective Date** – Click the **Calendar** and select the date the Market Rent decrease will take effect. The effective date must be the current date (today's date) or a future date. The system will not process a decrease if a past date is entered.
 - g. **Rounding** – Using the drop down, select Down
 - h. **Report Only** – Using the drop down, select the relevant option. Selecting "Yes" and click **Submit** will produce a report of the changes to be made. Selecting "No" will proceed with the Unit Rent decreases
 - i. **Destination** – Leave as is
6. Click **Submit**

[Process ends](#)

How to Create the Certificates Done Report

This process begins at the Voyager landing page

System Steps

1. From the left-hand side of the screen, click **HP Reports**
2. Click **Certificates Done**. A Certificates Done report page will display
3. Enter:
 - a. **Property** – Click the **Property** hyperlink. A Property window will appear. Select relevant Property(s)
 - b. **Effective Date** – Use the **Calendars** to select the date perimeters for the report. The **left Calendar** is the earliest Effective date that a Certificate has been done. The **right Calendar** is the latest Effective date that a Certificate has been done
 - c. **Review Type** – The type of Certificates that will be displayed. Selecting the blank entry will display all Certificate types. Multiple Review Types can be selected by holding Ctrl and click multiple Review Types.
 - d. **Destination** – How the information will be displayed
 - i. **Screen** – The information will be displayed within Voyager
 - ii. **Screen optimized for landscape printing** – The information will be displayed to be more viewing friendly in the landscape orientation
 - iii. **Screen optimized for portrait printing** – The information will be displayed to be more viewing friendly in the portrait orientation
 - iv. **Download CSV file** – The report will be downloaded in an Excel file. Downloaded report can have filters applied
 - v. **Email Excel file** – The report will be emailed in an Excel file to the email associated with the user. Downloaded report can have filters applied
 - vi. **Email PDF file** – The report will be emailed in an PDF file to the email associated with the user. PDF files can not have filters applied
 - vii. **Save to Excel file** – The report will be downloaded in an Excel file with visual enhancements. Downloaded report can have filters applied
 - viii. **Save to PDF** – The report will be downloaded in an PDF file with visual enhancements. PDF files can not have filters applied
4. Click **Submit**

[Process ends](#)

How to Create the Certificates Due Report

This process begins at the Voyager landing page

System Steps

1. From the left-hand side of the screen, click **HP Reports**
2. Click **Certificates Due**. A Certificates Due report page will display
3. Enter:
 - a. **Property** – Click the **Property** hyperlink. A Property window will appear. Select relevant Property(s)
 - b. **Months Out** – Timeframes to when a Certificate's Next Annual Review date is relative to the day the report is created
 - i. **Blank** – All Certificates that are due will be displayed
 - ii. **Due** – All Certificates that have a Next Annual Review date within 6 months of the report's creation date will be displayed
 - iii. **Past Due** – All Certificates that have a Next Annual Review date that is before the report's creation date
 - iv. **Next Year A/R** – All Certificates that have a Next Annual Review date that is more than 6 months of the report's creation date will be displayed
 - c. **Destination** – How the information will be displayed
 - i. **Screen** – The information will be displayed within Voyager
 - ii. **Screen optimized for landscape printing** – The information will be displayed to be more viewing friendly in the landscape orientation
 - iii. **Screen optimized for portrait printing** – The information will be displayed to be more viewing friendly in the portrait orientation
 - iv. **Download CSV file** – The report will be downloaded in an Excel file. Downloaded report can have filters applied
 - v. **Email Excel file** – The report will be emailed in an Excel file to the email associated with the user. Downloaded report can have filters applied
 - vi. **Email PDF file** – The report will be emailed in an PDF file to the email associated with the user. PDF files can not have filters applied
 - vii. **Save to Excel file** – The report will be downloaded in an Excel file with visual enhancements. Downloaded report can have filters applied
 - viii. **Save to PDF** – The report will be downloaded in an PDF file with visual enhancements. PDF files can not have filters applied
4. Click **Submit**

[Process ends](#)

How to Create the LOE Report

This process begins at the Voyager landing page

System Steps

1. From the left-hand side of the screen, click **HP Reports**
2. Click **LOE Report**. A Loss of Eligibility report page will display
3. Enter:
 - a. **Property** – Click the **Property** hyperlink. A Property window will appear. Select relevant Property(s)
 - b. **Destination** – How the information will be displayed
 - i. **Screen** – The information will be displayed within Voyager
 - ii. **Screen optimized for landscape printing** – The information will be displayed to be more viewing friendly in the landscape orientation
 - iii. **Screen optimized for portrait printing** – The information will be displayed to be more viewing friendly in the portrait orientation
 - iv. **Download CSV file** – The report will be downloaded in an Excel file. Downloaded report can have filters applied
 - v. **Email Excel file** – The report will be emailed in an Excel file to the email associated with the user. Downloaded report can have filters applied
 - vi. **Email PDF file** – The report will be emailed in an PDF file to the email associated with the user. PDF files can not have filters applied
 - vii. **Save to Excel file** – The report will be downloaded in an Excel file with visual enhancements. Downloaded report can have filters applied
 - viii. **Save to PDF** – The report will be downloaded in an PDF file with visual enhancements. PDF files can not have filters applied
4. Click **Submit**

[Process ends](#)

How to Create the Overhoused Report

This process begins at the Voyager landing page

System Steps

1. From the left-hand side of the screen, click **HP Reports**
2. Click **Overhoused Report**. A Overhoused report page will display
3. Enter:
 - a. **Property** – Click the **Property** hyperlink. A Property window will appear. Select relevant Property(s)
 - b. **Destination** – How the information will be displayed
 - i. **Screen** – The information will be displayed within Voyager
 - ii. **Screen optimized for landscape printing** – The information will be displayed to be more viewing friendly in the landscape orientation
 - iii. **Screen optimized for portrait printing** – The information will be displayed to be more viewing friendly in the portrait orientation
 - iv. **Download CSV file** – The report will be downloaded in an Excel file. Downloaded report can have filters applied
 - v. **Email Excel file** – The report will be emailed in an Excel file to the email associated with the user. Downloaded report can have filters applied
 - vi. **Email PDF file** – The report will be emailed in an PDF file to the email associated with the user. PDF files can not have filters applied
 - vii. **Save to Excel file** – The report will be downloaded in an Excel file with visual enhancements. Downloaded report can have filters applied
 - viii. **Save to PDF** – The report will be downloaded in an PDF file with visual enhancements. PDF files can not have filters applied
4. Click **Submit**

[Process ends](#)

How to Create the Move-In Report

This process begins at the Voyager landing page

System Steps

1. From the left-hand side of the screen, click **HP Reports**
2. Click **Move-In Report**. A Move-In report page will display
3. Enter:
 - a. **Property** – Click the **Property** hyperlink. A Property window will appear. Select relevant Property(s)
 - b. **Destination** – How the information will be displayed
 - i. **Screen** – The information will be displayed within Voyager
 - ii. **Screen optimized for landscape printing** – The information will be displayed to be more viewing friendly in the landscape orientation
 - iii. **Screen optimized for portrait printing** – The information will be displayed to be more viewing friendly in the portrait orientation
 - iv. **Download CSV file** – The report will be downloaded in an Excel file. Downloaded report can have filters applied
 - v. **Email Excel file** – The report will be emailed in an Excel file to the email associated with the user. Downloaded report can have filters applied
 - vi. **Email PDF file** – The report will be emailed in an PDF file to the email associated with the user. PDF files can not have filters applied
 - vii. **Save to Excel file** – The report will be downloaded in an Excel file with visual enhancements. Downloaded report can have filters applied
 - viii. **Save to PDF** – The report will be downloaded in an PDF file with visual enhancements. PDF files can not have filters applied
4. Click **Submit**

[Process ends](#)

How to Create the Move-Out Report

This process begins at the Voyager landing page

System Steps

1. From the left-hand side of the screen, click **HP Reports**
2. Click **Move-Out Report**. A Move-Out report page will display
3. Enter:
 - a. **Property** – Click the **Property** hyperlink. A Property window will appear. Select relevant Property(s)
 - b. **Destination** – How the information will be displayed
 - i. **Screen** – The information will be displayed within Voyager
 - ii. **Screen optimized for landscape printing** – The information will be displayed to be more viewing friendly in the landscape orientation
 - iii. **Screen optimized for portrait printing** – The information will be displayed to be more viewing friendly in the portrait orientation
 - iv. **Download CSV file** – The report will be downloaded in an Excel file. Downloaded report can have filters applied
 - v. **Email Excel file** – The report will be emailed in an Excel file to the email associated with the user. Downloaded report can have filters applied
 - vi. **Email PDF file** – The report will be emailed in an PDF file to the email associated with the user. PDF files can not have filters applied
 - vii. **Save to Excel file** – The report will be downloaded in an Excel file with visual enhancements. Downloaded report can have filters applied
 - viii. **Save to PDF** – The report will be downloaded in an PDF file with visual enhancements. PDF files can not have filters applied
4. Click **Submit**

[Process ends](#)

How to Create the Unit Report

This process begins at the Voyager landing page

System Steps

1. From the left-hand side of the screen, click **HP Reports**
2. Click **Unit Report**. A Unit report page will display
3. Enter:
 - a. **Property** – Click the **Property** hyperlink. A Property window will appear. Select relevant Property(s)
 - b. **Destination** – How the information will be displayed
 - i. **Screen** – The information will be displayed within Voyager
 - ii. **Screen optimized for landscape printing** – The information will be displayed to be more viewing friendly in the landscape orientation
 - iii. **Screen optimized for portrait printing** – The information will be displayed to be more viewing friendly in the portrait orientation
 - iv. **Download CSV file** – The report will be downloaded in an Excel file. Downloaded report can have filters applied
 - v. **Email Excel file** – The report will be emailed in an Excel file to the email associated with the user. Downloaded report can have filters applied
 - vi. **Email PDF file** – The report will be emailed in an PDF file to the email associated with the user. PDF files can not have filters applied
 - vii. **Save to Excel file** – The report will be downloaded in an Excel file with visual enhancements. Downloaded report can have filters applied
 - viii. **Save to PDF** – The report will be downloaded in an PDF file with visual enhancements. PDF files can not have filters applied
4. Click **Submit**

[Process ends](#)

How to Create the Vacancy Report

This process begins at the Voyager landing page

System Steps

1. From the left-hand side of the screen, click **HP Reports**
2. Click **Vacancy Report**. A Vacancy report page will display
3. Enter:
 - a. **Property** – Click the **Property** hyperlink. A Property window will appear. Select relevant Property(s)
 - b. **Destination** – How the information will be displayed
 - i. **Screen** – The information will be displayed within Voyager
 - ii. **Screen optimized for landscape printing** – The information will be displayed to be more viewing friendly in the landscape orientation
 - iii. **Screen optimized for portrait printing** – The information will be displayed to be more viewing friendly in the portrait orientation
 - iv. **Download CSV file** – The report will be downloaded in an Excel file. Downloaded report can have filters applied
 - v. **Email Excel file** – The report will be emailed in an Excel file to the email associated with the user. Downloaded report can have filters applied
 - vi. **Email PDF file** – The report will be emailed in an PDF file to the email associated with the user. PDF files can not have filters applied
 - vii. **Save to Excel file** – The report will be downloaded in an Excel file with visual enhancements. Downloaded report can have filters applied
 - viii. **Save to PDF** – The report will be downloaded in an PDF file with visual enhancements. PDF files can not have filters applied
4. Click **Submit**

[Process ends](#)

How to Create the Validation Report

This process begins at the Voyager landing page

System Steps

1. From the left-hand side of the screen, click **HP Reports**
2. Click **Validation Report**. A Validation report page will display
3. Enter:
 - a. **Property** – Click the **Property** hyperlink. A Property window will appear. Select relevant Property(s)
 - b. **Destination** – How the information will be displayed
 - i. **Screen** – The information will be displayed within Voyager
 - ii. **Screen optimized for landscape printing** – The information will be displayed to be more viewing friendly in the landscape orientation
 - iii. **Screen optimized for portrait printing** – The information will be displayed to be more viewing friendly in the portrait orientation
 - iv. **Download CSV file** – The report will be downloaded in an Excel file. Downloaded report can have filters applied
 - v. **Email Excel file** – The report will be emailed in an Excel file to the email associated with the user. Downloaded report can have filters applied
 - vi. **Email PDF file** – The report will be emailed in an PDF file to the email associated with the user. PDF files can not have filters applied
 - vii. **Save to Excel file** – The report will be downloaded in an Excel file with visual enhancements. Downloaded report can have filters applied
 - viii. **Save to PDF** – The report will be downloaded in an PDF file with visual enhancements. PDF files can not have filters applied
4. Click **Submit**

[Process ends](#)