City of Toronto Systems Guide for Voyager & RentCafe

September 2026

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Introduction to City of Toronto Systems

City of Toronto Systems (CoT) must be used by all Housing Providers that administer a benefit program on behalf of the City of Toronto.

City of Toronto Systems consists of Yardi One, Voyager and RentCafe.

- ✓ Yardi One is a single sign-on platform that provides central access to all systems that a housing provider has permission to use.

- ✓ Voyager is the module used for ongoing program eligibility including building inventory and benefit/program ratio management.

- ✓ RentCafe is the module used to fill vacancies, create service tickets and review applicant information

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.

Purpose of this Guide

This guide provides an overview of the business processes and step-by-step instructions on how to perform tasks in Voyager and RentCafe for the purpose of ongoing program eligibility including

- ✓ Conducting reviews including all rent calculations
- ✓ Allocating RGI subsidies
- ✓ Tracking Notice of Decision – Loss of Eligibility
- ✓ Creating and Filling of Vacancies
- ✓ Advertising Vacancies
- ✓ Building inventory and benefit/program ratio management
- ✓ Access Reports

Online resources

To ensure you have the current version of the guide, do not print it. Please use the online version of the guide, tools and videos to be sure you are using the most up-to-date version.

Internal Links for level of detail

We have included frequent links from text in one part of the manual to that of another. In many instances, the destination text has a link back to the original text. However, to ensure a quick return to the original text, we recommend that readers note the page number of the text containing the original link before going to the destination

A Note on Terminology

Several key terms in this manual have meanings, which may differ from those used by non-profits and co-ops

- ✓ “RGI administrator” refers to a person designated as responsible for the management and/or implementation of any part of the RGI program within their organization
- ✓ “tenants” includes co-op members
- ✓ “rent” includes co-op housing or occupancy charges
- ✓ “leases” includes co-op occupancy agreements

System Synchronization

Synchronization (Sync) is the sharing of information between Voyager and RentCafe. Synchronization occurs automatically at the end of each business day. (scheduled) A manual sync can be done which will sync the 2 systems immediately.

The information shared between RentCafe and Voyager is:

- ✓ Properties
- ✓ Units

The information shared from RentCafe to Voyager only relates to:

- ✓ Applicant
- ✓ Documents

No information relating to tenancy is shared between Voyager and RentCafe.

Section 1: Voyager

RGI Administrators will use Voyager to complete the following tasks:

- ✓ Create vacancies and terminate tenancies (move-outs)
- ✓ Manage program ratios
- ✓ Perform Initial, Annual and Interim reviews
- ✓ Perform Rent Calculations
- ✓ Update unit statuses
- ✓ Track Notice of Decision – Loss of Eligibility
- ✓ Maintain Additional Household Information relating to Program Type (RGI/MSA). Overhoused, Paying Market Rent

Voyager Key Terms

Term	Description
Centralized Waiting List (CWL)	The Housing Services Act, 2011 (HSA), requires that service managers, such as the City of Toronto, have and maintain one CWL for RGI/RGI-MSA housing. Housing providers who receive subsidies from the City of Toronto to fund RGI/RGI-MSA assistance must select applicants for all RGI/RGI-MSA subsidies from the CWL.
RentCafe	RentCafe is the City of Toronto's online portal for housing providers to fill RGI/RGI-MSA vacancies or allocate RGI/RGI-MSA subsidies.
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 which will remove 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 targets.
Family Group	Represents how the Household Members 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 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 any time 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.

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 – Over housed

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

Move-In Certificates – MI (New Tenants)

When an applicant has accepted an offer, and the applicant information has been submitted to Voyager via RentCafe a Tenant ID and RGI Flag will be created in Voyager through the system synchronization process. Applicant information that exists in RentCafe, except for Income and Assets, will populate in the initial MI certificate. Documents that are in RentCafe can also be uploaded into Voyager (refer to RentCafe Offer process).

Housing providers will need to identify the MI certificates and complete them prior to the leasing of a unit takes place.

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

Refer to:

- How to identify MI Certificate to be completed
- Updating and Completing a Certificate
- How to Upload an Attachment

Posting a Move-In

After the MI certificate is complete, you must post the move-in. Once the move in date passes, this will update the tenancy **Status** from Future to Current.

Refer to: How to Post a Move In

> Once the Move in has been posted, the vacancy will be automatically update to “Occupied” in RentCafe

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

Cancelling a Move In

A Housing Provider is advised by an applicant that they will not be moving in. A move in can only be cancelled if the move in date has not taken effect.

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 Add or Update a Tenant Memo

> Upon system synchronization, the unit will appear in RentCafe as “Available for Offer”. You can now continue with the offer process in RentCafe

Annual and Interim Review Certificates (AR/IR)

When completing an annual review or interim review, ensure you select the appropriate certificate type to complete the review.

Refer to:

- 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

Reopening 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 use 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) Override notes are mandatory and must explain the reason for the override.

For RGI Administration, overrides will be used for the for Tenant Rent

Refer to: How to Perform an Override in an RGI Certificate

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 or RGI-MSA Allowances

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

Households who are under the RGI-MSA program may qualify for an allowance if they are in receipt of a benefit (OW/ODSP). Some allowances may include insurance, cable, etc. Refer to the RGI-MSA guide for more information.

Non-RGI Charges/Allowances, if applicable, are setup at the initial move-in and updated at the Annual Review or when an InYear Review is completed. These charges /allowances will be included in the RGI Review document.

Refer to: How to create Non-RGI Charges or Allowances

Supporting Documents

All documents used to support on-going eligibility or Notice of Decision(s) must be uploaded into the tenant file. These documents can include but are not limited to the Annual Review package, Notice of Assessment, Proof of Student Status, Ow or ODSP statement, Asset Forms.

Refer to: How to Upload Attachments

Over housed Households

Once a household has been deemed as over housed, housing providers must update the "Additional Housing Info" table to identify the household as being over housed. The Notice of Decision – Over housed must be uploaded into the tenant file and a certificate memo needs to be 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** is to be removed from a household, you must first swap the relationship with another family member within the household. Once the relationship has been successfully swapped, only then can the family member be deleted from the household. A head of household must be 16 years of age and older.

Examples where the Head of Household will 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 in 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 and tertiary 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
- How to Log an LOE Request for Review

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 create a certificate memo to record 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 a Request for a Rent Review of a Certificate
- How to Perform a Correction Review

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 the 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 the 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-base. 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 Units 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 this type**)
- **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 confirm that the unit benefit type is correct in the SVT table. There are instances when the 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**". There is no RGI administration for market rent units, therefore they must be "**Excluded"** from Voyager. If the Market Rent Tenant moves out of the Unit, a Move-Out will still need to be performed.

In the situation where a unit is changing from RGI to Market Rent while the unit is vacant until it will be 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 need to 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 so the vacancy can be filled in RentCafe.

Refer to:

- How to Add/Update the SVT Record
- How to Exclude a Unit
- How to Reinstate an Excluded Unit
- How to Place a Unit on Notice
- How to Post a Move Out

Market Rent Increases

The Unit Market Rent Increase function will calculate a new market rent for a unit by applying either a flat dollar amount or a percentage to the current market rent amount.

Market rent increases must be entered into the system prior to the effective dates. This will ensure the units' market rent amounts are current.

Market rent increases cannot be done retro-actively. The effective date of the increase must be the current date or a future date.

Refer to: How to Perform a Market Rent Unit 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 Reinstating Excluded Units from Voyager

When a unit has a benefit type of Market, the unit must be excluded from Voyager's RGI active inventory. The unit is still visible in Voyager but there is no RGI administration, including filling it, if it is vacant. When a Market unit becomes an RGI unit, the unit must be **reinstated** so it appears in voyager's active RGI inventory.

Refer to:

- How to Exclude a Unit
- How to Reinstate an Excluded Unit

When a unit has been reinstated, upon synchronization, the vacancy will appear in RentCafe. You can proceed to prepare the vacancy to be filled.

Unit Status in Voyager

In Voyager a unit has two types of statuses:

- unit status which is the current availability
- tenancy status which is the tenant's occupancy status

Unit Status and Description

The unit status is updated when the unit is excluded or when a move-in or move-out is posted.

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

Tenancy Status and Description

The tenancy status is updated when a move-in is posted, unit is placed on Notice, or when the move-out process has been performed.

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

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. For all vacancies that will be filled through RentCafe, the vacancy must have a status of "Available for Offer – Ready for Review" or "Available for Offer" in RentCafe within 2 weeks of the Move-Out date. If the Unit requires more than 2 weeks to be made available due to unforeseen circumstances, create a Unit vacancy delay reason. Once the provider determines the occupancy date, the **Date Available** can be added to the unit.

Refer to:

- How to Place a Unit on Notice
- How to Post a Move Out
- How to Edit a Unit's Date Available

Once a Unit has been placed on **Notice** the vacancy will be displayed in RentCafe upon synchronization.

You can now proceed to prepare and fill the vacancy in RentCafe.

Adjusting and Cancelling Move-Outs

There are instances 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 need to be updated.

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

Refer to:

- How to Adjust Move-Out Date

- How to Cancel Notice
- How to Cancel a Move-Out

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, the housing provider will follow one of these 2 steps:

- If the tenants do not have an **eligible** application in RentCafe, follow the Unit Transfer process.
- If the Tenants have an **eligible** application in RentCafe follow the direct allocation process.

Refer to: Internal Unit Transfer

Appendix A – Voyager 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 Search for a Unit

This process begins at the Voyager landing page

1. Menu box left hand side of screen
2. Click on Unit>**Review Unit**
3. If fields are populated, Click **Clear**
4. In the **Unit** field enter the unit number. System will display all possible matches.
5. Click on correct unit.
6. Click **Submit**

Process ends

How to Complete a Move-in Certificate

This process begins from tenant screen

System Steps

1. Click **RGI Tab**
2. Under the Move In certificate, click the heading **View/Edit,** click on **Edit**
3. Under the RGI summary tab:
    a. Review and update the **Effective Date** to reflect the day the subsidy commences
    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
4. Click on **Family Member** Tab
    a. Edit/Add Family Members (see: How to Add/Update a Family Member)
5. Click the **Income** tab
    a. Add Income Records (see: How to Add/Update an Income Record)
6. 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)
7. Click on **Validation** Tab and correct all errors as listed
8. Return to the **RGI summary**. If all information is correct, check off **Complete** box
9. **Date Completed** will auto populate.
10. Click **Save**
11. Click **Close**
12. 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 Create the Initial Certificate for Existing Tenants

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

This process begins 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
    c. Do not use MI or MO
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 Perform an Annual/Interim Review

This process begins 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 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** it must be changed to **edit** to allow the change (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 Add or 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,** it must be changed to **Edit** to allow the change (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

b. 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 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's RGI rent amount is the same as the Market Rent amount.

   Over housed

   a. **Over housed** – Select if the Household is Over housed by using the drop down arrow
   b. **Over housed Date** – Click the **Calendar** and select the date that the Household became Over housed
   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 or 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 **White Page icon**
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 Add or 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
b. 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
c. 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 Non-RGI Charges or Allowances

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. If creating an allowance you must enter the minus sign (-) before the dollar amount in order for the system to calculate it correctly. For example an allowance of the $20 is entered as **- 20**.
    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 /allowance
    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/allowance
    j. **5th Other Charge Code** – Click the **hyperlink** and select the applicable charge /allowance
    k. **Amount of 5th Charge** – Enter the amount associated with the fifth charge/allowance
    l. Click **Save**

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
2. 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 Add or Update a Certificate Memo

This process begins at the tenant screen

System Steps

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

When adding a new Certificate Memo

5. Enter:
    a. **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.
    b. **Time field** will be auto populated based on the time the Memo was initiated, using the Clock icon update the hour/minute if applicable
    c. **Type,** using the drop down, choose applicable **Memo** type
        i. **Rent Calculation Review Request –** When tenant requests a review of a Notice of Decision rent calculation
        ii. **Incomplete Package –** When an Annual Review is overdue because it wasn't received, or documents are missing
        iii. **AR/IR NOD Issued** – When the Notice of Decision for rent calculation has been issued
        iv. **NOD-Over housed Issued** – When the Notice of Decision –Over housed has been issued
    d. **Status** – Progress of the Memo
    e. **Result** – **To be used with Rent Calculation Review Request ONLY**. Using the drop down choose applicable result
    f. **Agents** – blank
    g. **Notes** – Add additional information pertaining to the Memo Type. For Memo Type Incomplete Package, state why Annual Review is overdue
    h. Annual Review was not submitted or
    i. Annual Review was submitted but supporting documents are missing
6. Click **Save**. Memo will appear at the top of page

When updating an existing Certificate Memo

5. Click on the **Memo to be updated** at the top of the window
6. Update relevant fields
7. Click **Save**

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 begins 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 needs to be re-opened
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 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 Add or Update a Tenant Memo

This process begins at the tenant screen

System Steps

1. Click on **Data** tab
2. Click on **Memo**. Memo window will appear

When adding a Tenant Memo

a. **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.
b. **Time field** will be auto populated based on the time the Memo was initiated, using the Clock icon update the hour/minute if applicable
c. **Type** – using the drop down, choose applicable **Memo** type
    i. **Cancel Move-In** – For additional notes on why a Tenant has a cancelled Move-In
    ii. If left blank, general notes pertaining to the Tenant can be entered
d. **Status** – Progress of the Memo
e. **Result** – **To be used with the Cancel Move-In type ONLY**. Using the drop down choose applicable result
    i. **Applicant Ineligible** – Include notes on why a Applicant was found ineligible for the Move-In
    ii. **Applicant Request** – Include notes on why the Applicant requested to cancel the Move-In
    iii. **Unit Not Ready** – Include notes on why the Unit was not ready for occupancy and the Move-In needed to be cancelled
    iv. **Other** – Include notes on why a Move-In was cancelled that does apply in the other result listed
f. **Agents** – blank
g. **Notes** – Add additional information pertaining to the Memo Type. For Memo Type Cancel Move-In, state the reason.
h. Click **Save**. Memo will appear at the top of page

When updating an existing Tenant Memo

3. Click on the **Memo to be updated** at the top of the window
4. Update relevant fields
5. 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** it must be changed **to Edit** to all the update (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** – Using the drop down, select the circumstance as to why the tenant has chosen to not Move In
        i. Cancel Move-Ins are to be accompanied by Tenant Memo to provide details on why the Move-In was cancelled (see: How to Add or Update a Tenant Memo)
    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 Cancel Notice

Notes: Cancelling Notice can only be performed for 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 Notice**
3. Tenancy Status will reflect a Current (C)

Process ends

How to Cancel a Move-Out

Notes: Cancelling a Move-Out can only be performed for 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 Post a Move-Out

Note: To post a Move-Out, the Unit must be placed on Notice (see: Placing a Unit on Notice)

This process begins at the tenant screen

System Steps

1. Click the **Functions** tab, click **Move Out**
2. A "Move Out has been Posted" message will appear
3. Tenancy Status will now reflect as Past (P)

Process ends

How to Edit a Unit 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 or 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 Perform a Market 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 Market Rent increase will take effect. The effective date must be the current date (today's date) or a future date. The system will not process an increase 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 increases
    i. **Destination** – Leave as is
3. Click **Submit**

[Process ends](#)

How to Perform a Market 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 Exclude a Unit

This process begins at the unit screen

System Steps

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

Process ends

How to Reinstate a Unit

This process begins at the unit screen

System Steps

1. Click **Edit**
2. Uncheck **Exclude** Box.
3. Click **Save**

Process ends

How to Adjust a 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 Add or Update a Unit Memo

This process begins at the Unit screen

System Steps

1. Click on **Functions** tab
2. Click on **Memo**. Memo window will appear

When adding a Unit Memo

3. Enter:
    a. **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.
    b. **Time field** will be auto populated based on the time the Memo was initiated, using the Clock icon update the hour/minute if applicable
    c. **Type –** Select **Occupancy Delay Reason**
    d. **Status** – Progress of the Memo
    e. **Result** – Using the drop down, select the reason why the Unit will not be ready for occupancy for a abnormal amount of time
    f. **Agents** – blank
    g. **Notes** – Add additional information pertaining to the Memo Type.
4. Click **Save**. Memo will appear at the top of page

When updating an existing Unit Memo

3. Click on the **Memo to be updated** at the top of the window
4. Update relevant fields
5. Click **Save**

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** it must be change to **Edit** to allow the change (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 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 Tertiary Reason**- If applicable, using the drop down arrow, select the secondary reason for serving the LOE
    d. **LOE Issue Date** – Click on the **Calendar** and select the date the LOE will be issued to tenant
    e. **LOE Effective Date** – Click on the **Calendar** and select the date the LOE is to be take effect
    f. **RFR Deadline** – Click on the **Calendar** and select the deadline date the Tenant can submit a Request for Review of the LOE
    g. **LOE Status** – Using the drop down, select the progress of the LOE
    h. **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)
    i. **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)
4. Click **Save**

Process ends

How to Log an NOD-LOE Request for Review

Note: A NOD-LOE Request for Review can only be done if a Notice of Decision – Loss of Eligibility has been logged (see: 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. **RFR Requested** – Using the drop-down arrow, select if a Request for Review has been requested by the Tenant
    b. **RFR Request Date** – Click the **Calendar** and select the date that the tenant had submitted the Request for Review
    c. **RFR Decision Date** – Click the **Calendar** and select the date the Request for Review Decision was made
    d. **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

Note: Performing a Unit Transfer with a Tenant without any certificate done will result in an error.

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. The 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

Task	System Steps	Process Guide
Searching for a Tenant Record	• 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	Section 1 – RGI Administration
Certificates - Move In (MI) - Annual Review (AR) - Interim Review (IR)	• How to Perform MI Certificate • How to Perform an AR/IR Certificate • 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 Perform an Override in an RGI Certificate • How to Complete an RGI Certificate • How to complete Additional Household Info • How to Upload an Attachment • How to Post a Move In	Section 1 – RGI Administration
Changes to Move In date	• How to Adjust a Move In Date • How to change the RGI effective date • How to Cancel a Move In	Section 1 – RGI Administration
Overdue Annual Reviews	• How to create/update a certificate memo	Section 1 – RGI Administration
Certificate Memos	• How to Add/Update a Certificate Memo	Section 1 – RGI Administration
Request for Rent Calculation Review	• How to Add/Update a Certificate Memo	Section 1 – RGI Administration

Correcting Certificates	• How to use Correction Review function	Section 1 – RGI Administration
Notice of Decision – Loss of Eligibility	• How to Create a Notice of Decision – Loss of Eligibility	Section 1 – RGI Administration
Request for Review (NOD-LOE)	• How to Create to Request for a Rent Review	Section 1 – RGI Administration
Subsidy & Vacancy Tracking History (SVT)	• How to Add/Update the SVT Record	Section 2 – Vacancy Management
Unit Rent Increases	• How to Increase Unit Rent Amount	Section 2 – Vacancy Management
Excluding and Reinstating Excluded Units	• How to Exclude a Unit • How to Reinstate an Excluded Unit	Section 2 – Vacancy Management
Placing Unit on Notice (Move Out)	• How to Place a Unit on Notice • How to Post a Move Out • How to Edit a Unit's Date Available	Section 2 – Vacancy Management
Adjusting and Cancelling Move Outs	• How to Adjust Move-Out Date • How to Cancel Notice • How to Cancel a Move-Out	Section 2 – Vacancy Management
Unit Memo	• How to Create a Unit Memo	Section 2 – Vacancy Management
Unit Transfer for Non-Priority Internal Transfers	• How To Perform a Unit Transfer	Section 2 – Vacancy Management

Section 2: RentCafe

RGI Administrators will use RentCafe to complete the following tasks:

- ✓ Maintain property and unit photos and amenities
- ✓ Make housing offers
- ✓ Create Service Tickets
- ✓ Perform Arrears Check
- ✓ Create or update Applicant files

RentCafe Key Terms

Term	Description
Access to Housing	The City's Access to Housing team provides support and services for RGI housing, online and in-person, at the Access to Housing Resource Centre. Access to Housing is responsible for: assessing eligibility of applicants applying for RGI managing and maintaining the Centralized Waiting List (CWL) supporting housing providers who use the CWL to fill vacancies verifying arrears in the Province-Wide Arrears Database monitoring the offer process in RentCafe monitoring and addressing housing provider compliance with vacancy management requirements
MyAccesstoHousingTO (MATHTO)	MATHTO is the City of Toronto's online application tool for households applying for and managing their application for RGI housing. Applicants use MATHTO to interact with Access to Housing. Applicants can: submit all required documentation update and view the status of their application receive notifications participate in the choice-based housing offer process once they are invited

Centralized Waiting List	The *Housing Services Act, 2011* (HSA), requires that service managers, such as the City of Toronto, have and maintain one CWL for RGI housing. Housing providers who receive subsidies from the City of Toronto to fund RGI assistance must select applicants for all RGI subsidies from the CWL. Households on the CWL are ranked by the date the household was made eligible for RGI unless they are part of a provincially legislated Special Priority Program (SPP). SPP applicants are ranked above all other households on RGI waiting lists. Other priorities on the CWL fall under the City's local access priorities. **For more details on priorities, see the** RGI Administration Manual & City Guidelines
RentCafe	RentCafe is the City of Toronto's online portal for housing providers to administer make housing offers and fill RGI vacancies

Household Applications on the CWL in RentCafe

Searching for an Applicant File

Any applicant being offered an RGI vacancy will need to have an eligible application in RentCafe.

Housing providers can search for applicant to:

- Update a file
- View a file
- Create a file (for over-housed applicants only)

An application can be searched using the following fields:

- Applicant Code
- Last name
- First name
- Date of birth

Any of the combinations above will produce a list of applicants that match the search fields entered.

There are multiple reasons why results may not be found by an applicant search:

- No application
- Status is not ‘eligible’
- The building complex has not been added to the applicant’s eligible file

Reviewing an Applicant File

Applicant information that is available in RentCafe and useful to housing providers includes:

Information	Description
Contact information	Contact applicants to make an offer
Status	Confirm a household's application status, including application date, priority status, and minimum/maximum number of bedrooms
Household Members	Review all household members listed on an application
Income	Review the household’s income
Documents	Review the household’s status in Canada documents and Notice of Assessment, and upload any necessary documents
Notes	Review and add notes
Arrears	Check an applicant file for any former tenant debts owed from a former tenancy to a social housing provider in Ontario (Mandatory)

Refer to:

- How to Search for an Applicant File
- How to Review an Applicant File
- How to Upload a Document to an Applicant File
- How to Add a Note to an Applicable File

Units in RentCafe

Only RGI units will appear in RentCafe. Users are responsible for the accuracy of the information they are entering into RentCafe.

In order for a unit to appear in RentCafe, it must exist in Voyager.

Searching for a Property and Unit

Providers can search for a property and unit in RentCafe to:

- determine if the unit already exists in the system
- change a modified unit flag if the modification setting is incorrect Refer to: How to Search for a Property and Unit

Confirming if a Modified Unit Flag Is Correct

If a housing provider finds that a unit already exists within a property, they must confirm if the unit has been identified correctly as modified or non-modified. The modified flag controls which applicants are eligible for this unit type.

Refer to: How to Change a Modified Unit Flag

Unit Status in RentCafe

Every unit in RentCafe must have a unit status that is reflective of its current availability.

Status	Unit Description
Available for Offer	Available and ready to be offered
Occupied	Occupied by an RGI tenant or tenants
Not Set Up	Default setting for any units that have not been changed to one of the four above statuses within RentCafe

Allocating an RGI Vacancy

Allocation Methods for RGI

The City of Toronto is committed to ensuring that the RGI program fills vacancies 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.

Direct Allocation

Direct allocation is when a housing provider allocates an RGI vacancy to a specific applicant on the waiting list that has been approved for that direct allocation method. The housing provider matches the approved applicant to the RGI vacancy or subsidy in RentCafe to complete the offer process.

Direct allocation methods include:

1. **Internal transfer lists** – Filling the vacancy with a current RGI tenant needing to move to another RGI unit. Internal transfer prioritization goes to households with an SPP or over-housed designation. (RGI Vacancy)
2. **The market rent to RGI (In-situ process)** – Offering a market rent tenant an RGI subsidy in their current unit (RGI Subsidy)
3. **A referral agreement** – Filling a vacancy through a referral-based program and referral agency. (RGI Vacancy)

For more details, see Direct Allocation.

Choice-Based

With the choice-based housing offer process, housing providers advertise their RGI vacancies, every two weeks, in what is called a choice-based cycle. Vacancy information will be advertised online through RentCafe. Applicants that are eligible for the RGI program and have been invited to participate in choice-based can express interest in the vacancies advertised by housing providers. The applicant who expresses interest and is the top ranked applicant in that cycle, will be contacted to receive a housing offer.

For more details, see Choice-Based Allocation.

Allocating an RGI Vacancy

Every housing provider has policies that govern how they allocate their subsidies. These include:

- Any time a housing provider has an RGI vacancy, they must first go to their internal transfer list and exhaust all priority transfers first.

- Once a housing provider has exhausted their priority transfers, they must refer to their internal transfer policy and targeting plan to determine how to fill the remaining vacancy.
    a. If the housing provider's policies and targeting plan dictate that the current vacancy should be filled with an RGI household, they must use the CWL and choice-based to fill the RGI vacancy.
    b. If a housing provider does not have a vacancy but, according to their targeting plan, has an available RGI subsidy, they may be able to offer a subsidy to a current market rent household.

For more on policy directives related to internal transfer, in-situ and referral agreements, see the RGI Administration Manual & City Guidelines.

Choice-Based Allocation

The City has implemented a way to access RGI housing in Toronto called the choice-based process. With the choice-based housing offer process, housing providers will advertise their RGI vacancies every two weeks, in what is called a choice-based cycle. Vacancy information will be advertised online through RentCafe.

Applicants that are eligible for the RGI program and have been invited to participate in choice-based can express interest in the vacancies advertised by housing providers. The top-ranked applicant who expressed interest will receive a housing offer.

The Choice-Based Cycles

Choice-based cycles open every two weeks, it is the provider's responsibility to review and manage upcoming vacancies to ensure they can be posted in the earliest possible cycle and avoid vacancy loss. Providers can use the calendar to reference when a cycle opens in order to plan which cycle they will include a vacancy in.

Housing providers have the "Choice-Based Units for Review" tile on their dashboard to track posted vacancies that require their attention. Tracking posted vacancies is the housing provider's responsibility to ensure that vacancies are complete and ready to be entered in a cycle.

Refer to: Choice-Based Calendar

Vacancy Information

Housing providers will provide information about vacant units, including photos, move-in dates, and amenities. Applicants will be able to view the vacancy information provided and make an informed choice to express interest on units that meet their current needs.

Refer to: Vacancy Submission Checklist

Expressions of Interest

After reviewing the available vacancy information, applicants can express interest in vacancies that meet their needs and for which they are interested in receiving a housing offer.

For more information on the applicant experience of choice-based, go to Choice-Based Housing Offer Process.

Filling a Vacancy through Choice-Based in RentCafe

To preparer a vacancy for a choice-based cycle, housing providers will need to update the following

Refer to: How to Post a Vacancy through Choice-Based

Information	Required Action
Property images	Upload a photo of the exterior of the property for any vacancy being posted. If possible, images of community room(s) and laundry room(s) are encouraged. Note: this only needs to be uploaded once, unless the appearance of the building exterior or other included images change Refer to: How to Upload Property Images
Property amenities	Identify and enter amenities related to the property at large, for example, accessibility, parking, laundry, onsite management, elevators, etc.
Common unit amenities	Identify and enter amenities common to all or some units within the property, for example, all or some units have carpeting, etc. Refer to: How to Enter Property Amenities and Common Unit Amenities
Unit images	Upload photos inclusive of the kitchen, all bathrooms, all bedrooms, and any living area. If possible, images of storage room and balcony are encouraged. Refer to: How to Upload Unit Photos
Unit Floor Plan	Upload floor plan for appropriate unit size Refer to: How to Upload a Floor Plan
Unit amenities	Identify and enter amenities related to the unit, for example floor range, flooring, balcony, appliances, in-unit temperature control, etc. Refer to: How to Enter Unit Amenities

Alt-text	Include a section of text that describes the content of the images they upload to meet accessibility requirements Refer to: Alt-Text Guidelines

Housing providers should ensure that the images and amenity information is fully representative of the specific vacant unit that will be offered.

The housing provider will change the choice-based status to “Ready for Review”. This initiates a review process of the vacancy by the Access to Housing/Choice- Based Cycle Management team.

Updating a Choice-Based Status

When a vacancy is being filled through choice-based, it will be reviewed for completeness and accuracy. There are four choice-based statuses the vacancy can move between from the time it is added through the review process, until it is successfully posted.

Status	Description
Pending – Not Ready for Review	Default status triggered
Ready for Review	All required photos and amenities have been posted and the housing provider is ready to have their vacancy reviewed.
Reviewed – Accepted	All criteria to be posted in a choice-based cycle have been met and Cycle Management has accepted and allowed it to be added to a choice-based cycle.
Reviewed – Rejected	Not all criteria to be posted in a choice-based cycle have been met and Cycle Management has rejected and prevented it from being added to a choice-based cycle. The housing provider must make the necessary corrections to the posted vacancy and set the choice-based status back to “Ready for Review” for Cycle Management to review again.

Refer to: How to Change a Choice-Based Unit Status

The housing provider must use the ***'Choice-Based Units for Review' Tile*** on their dashboard to track their posted vacancies that remain **outstanding**, such as “Not Ready for Review” or have been “Reviewed-Rejected” and require corrections to be “Reviewed-Accepted”.

If a unit’s “Available Date” is within 90 days of a cycle opening, it will automatically be included in the upcoming cycle.

When the cycle opens, the housing provider can confirm which units were entered in a cycle by searching RentCafe and filtering by specific cycles.

Refer to: How to Determine if a Unit is in a Current Cycle

Summary: Getting a Unit into a Cycle

1. Reference the choice-based cycle calendar for cycle open dates.
2. Submit a completed vacancy for review, at least 4 business days prior to the cycle open date, to ensure it can be reviewed, corrected if necessary and included in the cycle.
3. Upload property and unit photos
4. Enter property and unit amenities
5. Change choice-based status to “Ready for Review”
6. Allow Cycle Management to review the vacancy posting. Be sure to log back in to check the choice-based status.
    a. If the vacancy has been “Reviewed – Rejected”, identify the reason for rejection and make the appropriate corrections. Set the choice-based status back to “Ready for Review”.
    b. If the vacancy has been “Reviewed – Accepted”, it will automatically be added to the appropriate choice-based cycle.

Once a cycle opens you cannot remove a vacancy amenities, or photos. If the vacancy must be excluded due to extenuating circumstances the housing provider is required to send an exclusion request to ProviderTechSupport@toronto.ca. Access to Housing will consider this request, according to allowable extenuating circumstances, and provide a decision to the housing provider.

Placing an Applicant "On-Offer" through Choice-Based in RentCafe

Once a vacancy is successfully included in a cycle and the cycle opens, applicants will have 12 calendar days to review the postings and express interest in vacancies that meet their current household needs. Housing providers must wait for the cycle to close before making offers.

Once a choice-based cycle closes:

- The top-ranked applicant will receive an email notifying them that they can expect to hear from the housing provider with an offer, within **two business days**
- The housing provider will log in to RentCafe to view the top ranked applicant on the housing provider's expression of interest list
- The housing provider **must always** put an applicant "on offer" to track offer outcomes in RentCafe
- The housing provider **must** place the top ranked applicant file "on offer" within **two business days** of a cycle closing

Housing providers must always put an applicant "on offer" in RentCafe before they proceed to making the offer to the applicant. This ensures that all offers are tracked in RentCafe, regardless of the outcome of the offer and prevents the applicant from receiving multiple offers at the same time.

Refer to:

- How to Place an Applicant "On Offer" through Choice-Based

To complete the offer process, see Completing the Offer Process and Outcomes.

Direct Allocation

Direct allocation is when a housing provider allocates a RGI vacancy to a specific applicant on the Centralized Waiting List that has been approved for that direct allocation method, including internal transfers, in-situ and referral agreements.

Housing providers must use RentCafe to match the approved applicant to the RGI vacancy to complete the offer process because the applicant has now been granted an RGI and therefore must be removed from the CWL or they will continue to receive offers of housing.

Types of Direct Allocation

Internal Transfers

An internal transfer is for RGI households who want to transfer to another unit within

their current housing provider's portfolio or who must transfer to another unit because they are over-housed. Every housing provider must have an internal transfer policy that governs how they manage their internal transfer list, priority, and non-priority. Any priority internal transfers must also have an eligible application on the Centralized Waiting List.

For more information on how to complete internal transfers in RentCafe for priority and non-priority internal transfers, see Posting a Vacancy through Direct Allocation.

Housing providers must rank RGI households approved for SPP status first on the internal transfer list and over-housed RGI households are the next priority on internal transfer list.

Priority Internal Transfers

Special Priority Program applicants on the internal transfer list

Access to Housing assesses all applications for the Special Priority Program (SPP). All applicants requesting SPP, including internal transfers, need to apply to Access to Housing.

If Access to Housing confirms a household's eligibility for SPP, the housing provider must place the household at the top of their internal transfer list. Rank SPP internal transfers by the SPP application approval date provided by Access to Housing.

For SPP tenants requesting an internal transfer, see the Special Priority Application.

Over-Housed RGI Households on the Internal Transfer List

An RGI household is considered over-housed if the household size decreases and the reduced household have more bedrooms than the City's Local Occupancy Standards allow.

As soon as the housing provider notifies a household that they are over-housed, if they have at least one suitably sized unit in their portfolio, they must ask the household if they would like to be placed on the internal transfer list for that building/development. If the household agrees to be added to the internal transfer list, the housing provider gives them an over-housed priority status for their current building/development.

If a housing provider does not have at least one suitably sized unit, then the household cannot be on the housing provider's internal transfer list. In both scenarios, an over-housed household must always be placed on the CWL as soon as the housing provider has notified the household that they are over-housed.

All priority internal transfers must be processed through RENTCafé. If a housing provider is filling an RGI vacancy with a priority internal transfer, they must search for the applicant in RENTCafé, confirm if they have an eligible application and offer it through direct allocation in RENTCafé.

For more details on internal transfer policies, see RGI Administration Manual and City Guidelines

In-situ

In-situ is when a housing provider offers an RGI subsidy to a market rent household that has requested a subsidy within their current unit and has been added to the "Building Complex – Applicants Currently Residing" (BCACR) list.

If a housing provider has an RGI subsidy available but no vacant unit, they may give the RGI subsidy to a market rent household living in their housing portfolio and top ranking on the BCACR. All in-situ requests must ultimately be approved by the City (Market Household Requesting RGI Assistance Approval Form).

To offer an RGI unit to a household on the BCARCR list, the unit benefit type for must be updated to "RGI" and UnExcluded in Voyager. Refer to Voyager Section on How to Update the SVT Table and How to UnExclude a Unit

For more details on in-situ policies, see RGI Administration Manual and City Guidelines

Referral Agreement

Some housing providers have approved referral agreements with agencies to fill some or all of their units. The approval of these referral agreements goes through the City of Toronto's Housing Secretariat, Housing Stability Services.

For more details on referral agreements policies, see RGI Administration Manual and City Guidelines

Excluding a Vacancy from Choice-Based

If a housing provider has identified they will be filling the vacancy through direct allocation, the vacancy must be excluded from Choice-Base.

When a vacancy has to be excluded from choice-based, the housing provider must:

1. Complete and submit a Housing Provider Technical Support Request
2. Click on the appropriate reason for the request and include the reason for the exclusion
3. Verify in RentCafe that the vacancy has been excluded

Refer to:

- How to Request a Vacancy be Excluded from Choice-Based
- How to Determine if a Vacancy has been Excluded from Choice-Based

Filling a Vacancy through Direct Allocation

When filling an RGI vacancy through direct allocation, housing providers must ensure that the household being offered has an eligible application on the Centralized Waiting

List so that the vacancy can be linked to the household being housed. All subsidies filled through direct allocation must be documented in RentCafe. They must:

- be posted
- have all offers recorded
- have offer outcomes documented

Placing an Applicant “On Offer” in RentCafe for Internal Transfers

Priority Internal Transfers

A priority internal transfer is a household on the CWL with an approved status of SPP or over-housed.

When placing an applicant “on offer” through internal transfer, housing providers will:

1. Refer to their internal transfer list to determine which applicant is going to be offered the RGI vacancy
2. Search for the applicant in RentCafe to ensure that they have an eligible application
3. Confirm that the applicant is eligible for the internal transfer based on the priority status
4. Request the vacancy be excluded
5. Place the applicant “on offer” in RentCafe
6. Complete an arrears check

Non-Priority Internal Transfers: RGI to RGI

If a housing provider is filling an RGI vacancy with a non-priority internal transfer, they must search for the applicant in RentCafe to confirm if they have an eligible application. If the applicant:

- has an application, follow the steps above for priority internal transfers
- does not have an application, complete the Unit Transfer Process in Voyager.

Refer to Voyager Section on How to Perform a Unit Transfer

Refer to:

- How to Place an Applicant “On Offer” through Internal Transfer/RGI to RGI
- How to Place an Applicant “On Offer” through Internal Transfer/Over-Housed

Placing an Applicant “On Offer” in RentCafe through In-Situ (Market Rent Applying for RGI Assistance)

When placing an applicant “On Offer” through in-situ/market rent to RGI, housing providers will:

1. Refer to the “Building Complex - Applicants Currently Residing” Report (BCACR) to identify the applicant being considered to receive the in-situ subsidy
2. Determine if the household’s income qualifies them for RGI*
3. Seek approval from the Housing Consultant to proceed with granting the in-situ subsidy

4. Upload the in-situ approval letter signed by their Housing Consultant under “Other Documents” tab
5. Request the vacancy be excluded
6. Place the applicant “on offer” in RentCafe
7. Complete an arrears check

> *Unique to the in-situ process, a housing provider must determine if the applicant household's income qualifies them to receive the RGI subsidy before posting the vacancy.

Refer to: How to Place an Applicant “On Offer” through In-Situ/Market Rent to RGI

Placing an Applicant “On Offer” in RentCafe through Referral Agreement

When placing an applicant “on offer” through referral agreement, housing providers will:

1. Refer to their referral agreement waiting list to determine which applicant is going to be offered the RGI vacancy
2. Search for the applicant the housing provider intends to offer through referral agreement and ensure that they have an eligible application
3. Request the vacancy be excluded
4. Place the applicant “on offer” in RentCafe
5. Complete an arrears check
6. Document which agency the referral agreement is within RentCafe Refer to: How to Place an Applicant “On Offer” through Referral Agreement

To complete the offer process, see Completing the Offer Process and Outcomes.

Completing the Offer Process and Outcomes

When a cycle closes and a housing provider is ready to offer a unit to the top-ranked applicant, ensure that the applicant is placed “on offer” in RentCafe **before** they are contacted. Putting the applicant “on offer” connects them to the unit in RentCafe. If a housing provider calls the applicant without first putting them on offer, they could be put on offer elsewhere (if they top-ranked on other units) and the housing provider will lose the ability to connect them to the unit. Always follow this sequence:

1. Put the applicant “on offer” in RentCafe
2. Call the top-ranked applicant to make the offer

Once an applicant has been placed “on offer”, the housing provider will use RentCafe to document the offer process. Regardless of what allocation method is used to fill the vacancy, the offer process is always followed and documented consistently in RentCafe.

Housing providers must adhere to the following two service level agreements (SLAs):

1. A housing provider must place an applicant on offer and contact the applicant with the offer within two (2) business days.
2. A housing provider has a maximum of 28 days to complete the offer process.

Contacting the Applicant Household

After putting an applicant file “on offer”, the housing provider will proceed to contact the applicant to make the offer of housing and add a note against the offer that describes details of next steps for this offer.

1. The housing provider must attempt to contact the applicant household using **all** the channels below, in the order in which they appear.
   a. **Offer by telephone**
   The housing provider will first attempt to offer the vacancy by telephone. If the household cannot be reached, they should leave a message if possible, and include:
      i. the details of the offer
      ii. the housing provider's contact information
      iii. a timeline to return the call

      If the housing provider cannot reach the household directly, call every number provided in the applicant household's file. If leaving a message, the housing provider should only leave their contact information, state that there is a subsidy and/or housing offer being made to the household only using the last name of the main applicant and indicate the timeline to respond. Make at least two attempts over two business days to reach the household. Make detailed notes of all contact attempts and communications. If a voicemail has been left, the applicant has two (2) business days to return the phone call.

b. **Offer by email**

The housing provider must offer the vacancy by email if the applicant household or alternative contacts are not reachable by telephone (For example, there is no answer and no voicemail.)

2. If the applicant household does not respond to any of the offer channels within two (2) business days, the offer is considered "Refused – Unreachable".
3. The vacancy will return to "Available for Offer".
4. The housing provider can then proceed to offer the next applicant through the expression of interest waiting list.

Refer to: How to Make an Offer by Email

Viewing the Unit and Possible Offer Outcomes

Once a housing provider has contacted an applicant household, they will offer a viewing of the unit. The housing provider must show the specific unit that is advertised in the choice-based cycle in which the applicant has expressed interest. They cannot show an alternative unit to what is advertised in the cycle. For example, if unit 201 was the advertised unit in the current choice-based cycle, the housing provider must show the applicant unit 201. Applicants being offered an RGI subsidy in their current market rent unit can bypass the viewing process.

The applicant will either:

1. Agree to view the unit in which case they are "Verbally Accepting" the offer
2. Choose not to proceed with the offer in which case it is considered a "Refusal"
3. If the *applicant household* has extenuating circumstances, the offer may be considered a "Withdrawal" (see "Withdrawal" reasons below)
4. If the *housing provider* has extenuating circumstances, they may "Decline to Offer" (see "Decline to Offer" reasons below)

Any of these outcomes and status changes must be documented in RentCafe with clear, descriptive notes, on what has transpired during each phase of the offer process.

After the applicant has viewed the unit, the offer can result in one of the following outcomes**:**

1. Accepted
2. Refused
3. Withdrawal
4. Declined to Offer

Possible Outcomes and Definitions

Accepted

Once an offer of housing has been made, the applicant must decide if they will accept the unit within two business days. The unit can then be:

1. **Verbally Accepted**: If the applicant is interested in viewing the unit they are considered to have "verbally accepted" the offer. This is a secondary status to 'on offer'.
2. **Accepted**: If the applicant has viewed and accepted the unit, an estimated move-in date will have been established, and the lease signing must be scheduled.

f a vacancy is accepted, the applicant's status in RentCafe will automatically change to "Housed".

If an applicant has accepted an offer but decides that they are no longer interested in the unit (they must not have already moved in), the housing provider can log into RentCafe and reset the offer to "On Offer". This will allow the housing provider to change the current offer to "Refused" and gain access to the next applicant on the waiting list to proceed with making offers.

Refer to: How to Reset to "On Offer" from "Accepted Status"

Withdrawal

If an applicant has viewed the unit and is not able to accept it due to an allowed exception, the offer may be considered a "Withdrawal".

Acceptable withdrawal reasons include:

- Bereavement
- changes in household composition on file
- client is not suitable for a shared unit, if applicable
- medical emergency/hospitalization
- not an informed offer
- Over-housed household is offered the same unit twice
- RGI tenant portion is higher than the market rent for the unit
- safety concerns (Special Priority Program applicants)
- unit amenities are not as described in post (not as advertised)
- unit does not meet household accessibility needs
- applicant owes arrears

For additional information on acceptable reasons to withdraw an offer, see the RGI Administration Manual

If a vacancy is a withdrawal, it will return to “Available for Offer” and the housing provider can then proceed to offer it to the next applicant. If the offer is through:

- **choice-based**, the housing provider will return to the expression of interest waitlist, which must be exhausted
- **direct allocation**, the housing provider can proceed to offer to the next eligible applicant based on the method they are using

Declined to Offer

If a housing provider has an allowed exception and proof that the household should not be offered the vacancy, they can “Decline to Offer”.

Acceptable “Declined to Offer” reasons include:

- applicant is not suitable for a shared unit
- applicants are unable or unwilling to participate in co-op responsibilities
- applicant no longer meets the building's mandate
- community safety (the applicant received an (N6/N6C) eviction conviction in the last five) years
- reasonable grounds to believe that applicant will not pay the rent in full and on time
- less than two years after an RGI fraud conviction with a social housing provider

Any “Declined to Offer” must be accompanied by proof of justification. This is not required to be uploaded in RENTCafé. If a vacancy is “Declined to Offer” it will return to “Available for Offer” and the housing provider can then proceed to offer the next applicant.

If the offer is through:

- **choice-based**, the housing provider will return to the expression of interest waitlist, which must be exhausted
- **direct allocation**, the housing provider can proceed to offer to the next eligible applicant based on the method they are using

Refusal

If the applicant does not respond to the offer of housing within two (2) business days, or has viewed and refused the unit, the offer is considered a “Refusal”.

Refusal reasons include:

- **Client unreachable**: Applicant household does not respond to any of the offer channels within two (2) business days
- **Other**: Explanation required

If a vacancy is refused, it will return to "Available for Offer" and the housing provider can then proceed to offer the next applicant. If the offer is through:

- **choice-based**, the housing provider will return to the expression of interest waitlist, which must be exhausted
- **direct allocation**, the housing provider can proceed to offer to the next eligible applicant based on the method they are using

When a vacancy in RentCafe has been placed "On Offer", they can refer to their "My Outstanding Offers-User Made Offer" tile on the dashboard to keep track of any outstanding offers that have not been completed.

Completing the Offer Process

When an applicant has accepted the offer, a tenant record must be created in Voyager in order to complete the initial review and rent calculation. All documents that are in the applicant's file will be uploaded into the tenant file in Voyager.

To submit the applicant information to Voyager a housing provider must update the offer status to Accepted-Submitted

Refer to: How to Complete Offer Process in RentCafe

Upon completion of the Move-In Certificate in Voyager and the move in has been posted the unit status in RentCafe will updated to "Occupied" once the system have been synchronized.

- ✓ If an applicant has accepted an offer but decides that they are no longer interested in the unit or the unit is no longer available due to unforeseeable circumstances (fire, flood) there are two options;
- ✓ If its occurs prior to the move in date in Voyager, the move in can be cancelled and the vacancy will display in RentCafe as "Available for Offer"
- ✓ Refer to "How to Cancel a Move-in" in Voyager Section
- ✓ If it occurs after the move in date in Voyager, the move in can no longer be cancelled and the unit must be placed on Notice. The unit will be updated to "Available for Offer" in RentCafe. The housing provider will need to request the vacancy to be Excluded from choice based again.

Refer to "How to place a unit on Notice" in Voyager Section.

Single Offer Rule

The Single Offer Rule, a requirement of the provincial Housing Services Act, means that applicants are eligible to receive only one offer of suitable RGI housing. If an applicant refuses the offer, they will be removed from the Centralized Waiting List. Failure to respond to an offer from a housing provider within two (2) business days is also counted as a refusal. While they are eligible to re-apply, they will receive a new application date and will start at the bottom of the Centralized Waiting List.

Applicants who do not agree with a decision to remove them from the Centralized Waiting List and have information regarding why they did not respond or accept the offer have thirty (30) days to request a "Decision Review" through their MyAccesstoHousingTO account.

Processing an Over-Housed Household in RentCafe

An RGI household immediately becomes over-housed if a household member leaves the unit and the household now has more bedrooms than the City's Local Occupancy Standards allow. If an RGI household becomes over-housed due to the death of a household member, the issuing of the over-housed notice is delayed by six months from the date of the death.

As soon as the housing provider notifies a household that they are over-housed, if they have at least one suitably sized unit in their portfolio, they must ask the household if they would like to be placed on the internal transfer list for that building/development. If the household agrees to be added to the internal transfer list, the housing provider gives them an over-housed priority status for their current building/development.

If a housing provider does not have at least one suitably sized unit, then the household cannot be on the housing provider's internal transfer list. In both scenarios, an over-housed household must always be placed on the CWL as soon as the housing provider has notified the household that they are over-housed.

Over-housed households have priority on RGI housing waiting lists and have the following priority rankings:

- Second, priority on housing providers' internal transfer lists, beneath applicants with an SPP designation
- Third Priority on the CWL, beneath applicants with an SPP designation and those with a terminal illness priority

For more information on the over-housed process, see the RGI Administration Manual and City Guidelines.

Required Housing Provider Actions when a Tenant Becomes Over- Housed

When a household is deemed over-housed, the housing provider must:

1. Issue the household a mandatory formal notice of decision using the Notice of Decision – Over-housed form, which can be found on RGI Forms and Tools. If an RGI household becomes over-housed due to the death of a member of the household, delay issuing the Notice of Decision – Over-Housed for six months from the date of death.
2. Make reasonable efforts to make direct personal contact with the over-housed tenant household to discuss the over-housed process, including the actions required of the household and the potential consequences of inaction.
3. Add the over-housed household to their internal transfer waiting list if the household wishes to be placed on the internal transfer list and the provider has (a suitably sized unit for the over-housed household.
4. Add the over-housed household to the CWL.

When a Household is identified as "OverHoused", an Additional Household Info record has to be created in Voyager . Refer to Voyager section on ' How to Add/Update Additional Household Info Record

Over-Housed Report

A revised version of this report is in progress and will be available at a future date.

Creating an Over-Housed Application

When a housing provider needs to add an over-housed tenant to the CWL, they must search RentCafe for an existing file the household:

- has an existing file, in eligible status, they will use this existing file to flag as over-housed on the CWL, as follows:
  - update the existing file to be as accurate as possible (including household members and contact information)
  - add a service ticket to the applicant file
  - upload a copy of the Notice of Decision – Over-Housed
- has no existing file, they must create a new one, as follows:
  - create the application
  - add all necessary household information

- add the service ticket to the applicant file
- upload a copy of the Notice of Decision – Over-Housed

Service tickets are requests created through the RentCafé system that need to be reviewed and actioned by Access to Housing.

Refer to:

- How to Create an Over-Housed Application for a New File
- How to Create an Over-Housed Application for an Eligible File

Important Timelines for Over-Housed Households

- The housing provider must issue a Notice of Decision – Over-Housed to the household as soon as they become over-housed (with the exception of the death of a household member)
- The housing provider must add the over-housed household to the CWL as soon as the Notice of Decision – Over-housed is issued. At this time, the household may choose to be added to their housing provider's internal waiting list if their current building/development has a suitably sized unit.
- Over-housed tenants must register in MATHTO and participate in Choice Based.
- Within the first year (twelve months) of receiving their Notice of Decision – Over-housed Households have unlimited refusals, from both the internal transfer waiting list as well as from the CWL.
- If the household is still over-housed after twelve months, Access to Housing will begin the process of adding the household to all upcoming vacancies within their ward preferences, for which they are eligible. This is intended to result in an offer.
- After a year of being over-housed, refusal of one offer of suitably sized housing will result in the household being issued a Notice Decision - Loss of Eligibility for RGI Assistance.

Over-housed households are required to maintain an active application on the CWL. Housing providers will be notified when to issue a Notice of Decision – Loss of Eligibility for RGI Assistance.

Over-Housed Households Refusing Offers of Suitable Housing

A refusal of one offer of suitably sized housing made after the first year will result in the household being issued a Notice Decision - Loss of Eligibility for RGI Assistance.

However, an offer of housing made to an over-housed household will be counted as a **withdrawal,** not a **refusal,** if the:

- unit being offered did not meet the accessibility needs of the household
- household no longer qualifies for the size of unit being offered
- households are offered the same unit twice; the second unaccepted offer is counted as a withdrawal
- household has an SPP priority and identifies a safety risk associated with the unit being offered
- level of support services attached to the unit is significantly different than the level of support services required by the household
- Households are experiencing a medical emergency and requests to have their application inactivated until they are in a move-in ready status during the offer process and provide supporting evidence within five days of this request.
- household has an SPP priority and advises that they are or will be living with the abusing individual during the offer.

All other refusals of transfer for over-housed RGI households will be recorded as **refusals**.

Resolution of Over-Housed Status

Households are no longer considered over-housed when they:

- accept an offer of a suitable sized unit
- no longer reside in the unit where they were over-housed
- are no longer considered over-housed by Local Occupancy Standards
- agree to pay market rent (with the approval of the housing provider)

If a household is no longer over-housed for a reason other than being moved to a suitably sized unit, (for example, they moved out or they added a household member), the housing provider must notify Access to Housing to remove the over-housed priority from the application and determine how to proceed with the application.

If the household is no longer over-housed because they have accepted an offer in a suitably sized unit, the housing provider must follow the appropriate offer process dependent on whether the offer was an internal transfer or a choice-based expression of interest.

For more information on internal transfers for over-housed households, see Direct Allocation.

- ✓ If a Household is no longer "Overhoused" the Additional Household Info Record must be updated in Voyager. Refer to Voyager section on How to Add/Update Additional Household Info Record

- ✓ If the Household is no longer an RGI tenant, you must updated the SVT table, Exclude the unit and place unit on Notice. Refer to Voyager Section on How to Update SVT,Exclude unit and Move Out

Adding a Tenant to the In-Situ List

In RGI housing, the in-situ process is when a household that is paying market rent requests that they be considered to receive an RGI subsidy within their current unit. Housing providers can add eligible market rent tenants to their in-situ list at any time. They do not need to have an RGI subsidy immediately available. In RentCafe, the in-situ list is referred to as the Building Complex – Applicants Currently Residing (BCACR) report.

If a housing provider has an RGI subsidy available, but no vacant unit, in certain circumstances they may give the RGI subsidy to a market rent household living in their housing portfolio.

The City has a local rule about when and how RGI assistance can be made available to market rent households currently living in social housing. Before offering RGI assistance to a market rent household, a housing provider must:

- be below their maximum allowed number of RGI units in their targeting plan
- have given the last offer of RGI assistance to a household from the CWL
- have received approval from their Housing Consultant
- ensure the household is not over-housed in their current unit (Over-housed households are not eligible for in-situ.)
- ensure the household remains in their current unit when the in-situ offer is made

Eligible In-Situ Applicants

Housing providers must inform all market rent households about the rules and their internal policy regarding current market rent households requesting RGI. This includes informing all market rent households in their building about the opportunity for an in-situ offer of RGI subsidy.

To be eligible for an in-situ RGI subsidy, the household must:

- have an eligible application on the CWL
- select their current building in their application for RGI subsidy, be approved as an in-situ household at MyAccesstoHousingTO and be deemed eligible
- inform the housing provider about their application to the CWL
- have been a tenant with their current housing provider for at least five years
- currently live in the size of unit they are eligible for and not over-housed according to the Local Occupancy Standards, as the in-situ offer for RGI will be for their current unit
- not have any outstanding arrears with the current housing provider or a previous

social housing provider within Ontario, or if they do have arrears, have a repayment agreement in place that is in good standing

For more details on Local Rules for providing RGI assistance to market rent households currently living in social housing, see the RGI Administration Manual and City Guidelines.

Adding a Market Rent Tenant to the BCACR Report

When a market rent tenant requests an in-situ RGI subsidy and has met the eligibility criteria, the housing provider will proceed to add the household to their in-situ list.

To add a tenant to the housing provider's in-situ list, they must:

- search RentCafe for the household and ensure the application status is eligible
- review the household composition to ensure the members on the applicant file match the members on the tenancy
- proceed to add a service ticket in RentCafe, to the applicant file. This alerts Access to Housing to review and action the request
- upload a copy of their original market rent lease

Access to Housing will review the request, document the outcome, and take any additional action which is required.

> Housing providers should open the household's file periodically and check for a decision, which could take up to two weeks

When Access to Housing has reviewed the service ticket request, they will either:

1. Approve the request and update the file in RentCafe
2. Deny the request and add a note to the file in RentCafe, including why the request was declined and what is needed

> Service tickets are requests generated by the housing provider through the RENTCafé system that will be reviewed and actioned by Access to Housing.

Refer to: How to Add a Tenant to the In-Situ List – Building Complex – Applicants Currently Residing (BCACR) Report

Running the In-Situ List - BCACR Report

When a housing provider has an RGI subsidy, but no vacant unit available, and they intend to provide an in-situ RGI subsidy to a market rent household, they must run the

Building Complex – Applicants Currently Residing (BCACR) report to determine who is top ranked on the list to receive an RGI subsidy.

The BCACR report lists all eligible in-situ applicants for the housing provider and is taken directly from the CWL. Access to Housing prioritizes households on the report by the original tenancy, move-in date. The highest ranked eligible applicant on the report must be considered for the in-situ RGI subsidy.

Refer to: How to Run the In-Situ List – BCACR Report

Housing Providers with Mandates

A mandate is an approved plan for a housing provider to exclusively house a particular population. Mandates apply to specific buildings, so a housing provider may have multiple buildings with and without mandates.

If a building has been assigned a mandate, households who apply for RGI units in the building must include at least one person who qualifies for the mandate.

Common mandates include:

- Seniors
- homeless or hard to house people (alternative housing providers)
- Indigenous people
- artists in live/workspaces and performing artists
- applicants from specific ethno-cultural or religious groups

For more details on housing providers with mandates, see the RGI Administration Manual and City Guidelines.

Applicant Eligibility for a Building with a Mandate

Seniors Mandate

To be eligible for a building with a senior’s mandate, a household must include at least one person who is 59 years of age or older. A household may include members who are younger than 59 years of age. This does not affect the household's eligibility for the unit, since one or more members qualify for the mandate. Seniors are eligible for senior mandated buildings based on the date of birth on their file.

Other Approved Mandates

If a building has a mandate other than seniors, they must make their mandate requirements available to the public, through their website and/or in any promotional materials about the building. They must also provide a copy of these requirements to Access to Housing.

Approval of a Household for a Building with a Mandate

When an applicant wishes to be considered for a mandated building, they must:

1. Log in to their MyAccesstoHousingTO account to add the building with the mandate to their list of “Building Selections”. This can be accessed by selecting “Building Complexes”.
2. Contact the housing provider of the building with the mandate. They will verify the household eligibility for the mandate. Information may need to be provided to verify eligibility.

If the housing provider confirms that the household is eligible, the housing provider must log into RentCafe and approve the applicant for the building with the mandate through the following process:

1. Search for the application using the applicant's p-code
2. Click the Building Complex tab
3. Locate your building with the mandate that the applicant selected
4. Update the status of the building selection from 'selected' to 'approved'

If they are unable to locate the building in the “Building Complexes” tab in RentCafe, the applicant did not add the building selection in the application portal. The housing provider must direct them to log in to their account to select the building with the mandate that they are interested in. This is the only way for the housing provider to approve the household for a building with a mandate in RentCafe.

If the housing provider confirms that the household is not eligible for the mandate, they are to communicate that directly with the applicant household and enter the denial of the building with the mandate in RentCafe. If it is realized that an applicant no longer meets a building’s mandate, the housing provider must update the application to remove the approval of the building with a mandate.

Refer to:

- How to Add an Approved Applicant to a Building with a Mandate
- How to Remove an Approved Applicant from a Building with a Mandate
- How to Deny an Applicant for a Building with a Mandate

Buildings with Mandates – Filling an RGI Vacancy

Like most housing providers who receive subsidies from the City of Toronto to fund RGI assistance, those with a mandated building must also select applicants for RGI units from the CWL. As such, housing providers with mandated buildings must refer to their targeting plan before they proceed to a specific allocation method.

For more information, see Allocating an RGI Vacancy or Subsidy

Direct Allocation

If the housing provider of a building with a mandate is using a direct allocation method, refer to the Direct Allocation section.

Choice-Based – Fully Integrated

If the housing provider of a building with a mandate is using the choice-based method, they would have been notified by Access to Housing that they have been fully integrated into the choice-based offer process.

For more information on posting a vacancy and placing an applicant on offer through choice-based, see Choice-Based Allocation.

If the housing provider has not been fully integrated into the choice-based method, Access to Housing will have notified them to use the brochure method.

Brochure Method – Modified Choice–Based

The brochure method is used to offer a vacancy outside of the choice-based cycle system. The brochure is created from within RentCafe and is emailed as a PDF attachment to an applicant that is on offer. The brochure is intended to provide the applicant with detailed information about the vacancy and building to make an informed decision. The housing provider will post the vacancy as they would for choice-based.

However, they will request that it be excluded from choice-based so that it can be offered using the brochure method.

If the housing provider of a building with a mandate is using the brochure method, they will:

1. Prepare the vacancy in RentCafe using the choice-based procedure for posting
2. Request the vacancy be excluded to ensure it does not end up in a choice-based cycle

Refer to: How to Request a Unit be Excluded from Choice-Based

For more information on preparing a vacancy for choice-based, see Choice-Based Allocation.

Placing an Applicant "On Offer" in RentCafe for the Brochure Method

When placing an applicant "on offer" through the brochure method, housing providers will do the following:

1. Use RentCafe to identify the top ranked applicant approved for the building with the mandate
2. Place the applicant "On Offer" in RentCafe
3. Contact the applicant to make the housing offer and email the brochure for the

applicant to view the details of the vacancy

4. Complete the offer process in RentCafe

Refer to:

- How to Place an Applicant “On Offer” through the Brochure Method
- How to Save the Property Brochure to Send to an Applicant
- How to Complete the Offer Process

Checking Arrears When Placing an Applicant “On Offer”

When a housing provider places an applicant “On Offer”, a PWAD check is required to ensure that the household members do not have former tenant arrears owed to any social housing provider in Ontario or are not in good standing with a repayment agreement. Housing providers can perform this check through the applicant’s file in RentCafe.

The results of the check are displayed in RentCafe and will return one of the following:

1. **No match found**: There is no match in the PWAD and the housing provider will proceed with making the offer.
2. **Match found**: There is a match in the PWAD that will include a full record with name, date of birth, amount owed, provider details and a score.

Refer to: How to Check Arrears at Time of Offer

Proceed with a Match Found in PWAD

When there is a match in the PWAD, it will return a score. The score is a percentage that represents the level of confidence in the returned results and is based on the precision of the match. When there is a match in the PWAD, the housing provider will send the information to Access to Housing to review the match details and verify the accuracy of the match.

To complete the process, the housing provider must:

1. Email the help desk ProviderTechSupport@toronto.ca with the subject line "On-Offer/Check Arrears Match" and include:
   a. applicant code
   b. applicant name
   c. description of offer details
   d. request for review of the PWAD match
2. Proceed to call the applicant to make the offer of housing and inform the applicant of the possible PWAD match that is under review by Access to Housing.
3. If Access to Housing determines that is not a true match, they will inform the housing provider to proceed with the offer.

4. If Access to Housing determines that it is a true match, they will advise the housing provider and they cannot proceed with the housing offer. The housing provider will advise the applicant that they cannot proceed with the offer, due to the outstanding debts. Access to Housing will withdraw the offer and communicate with the applicant on next steps regarding the arrears.

Applicants will not be offered a viewing of the unit until the PWAD match review is conclusive.

Appendix B: Process Documents

Applicant File

How to Search for an Applicant File

- When searching for an applicant file using date of birth, the born between fields allows a search to be done by the following two ways:
  - **Specific date of birth:** both range fields must be entered with the same date of birth, for example, **10/10/1990 - 10/10/1990**; or
  - **A range:** both range fields must be entered by the range dates, for example, **10/01/1990 - 10/30/1990**
- If you cannot find the applicant you are looking for, this does not necessarily mean that they do not have an application. If you search for an applicant and you do not find them, email Access to Housing at ProviderTechSupport@toronto.ca
- Access to Housing will conduct a search to verify if there is an application in RentCafe and will advise you of the outcome

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click on the **Applications Filter tile** *(Application page opens)*
3. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name, last name and/or date of birth
4. Click **Find button** *(a list of potential matches will appear)*
5. Click on the applicant’s name to open the profile (*Application page opens)*
   Process ends

How to Review an Applicant File

Notes for Housing Provider

- Prior to calling the applicant to make the offer, a housing provider can review information in the application
- Outlined is the key information for providers to review along with a brief description of the types of information that is displayed within each applicable tab

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click on the **Applications Filter tile** *(Application page opens)*
3. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name, last name and/or date of birth
4. Click **Find button** *(a list of potential matches will appear)*
5. Click on the applicant's name to open the profile (*Application page opens)*
6. Review the top half of the screen, which displays the following information:
    a. Main applicant's name
    b. Current status of the application. For example, housed or eligible.
    c. Applicant's phone numbers and email address
    d. Alternative contact information
7. Review **Status tab**, which displays the following information:
    a. **Status** column: shows the applicant's current application status Housed or eligible
    b. **Minimum and Maximum Unit** column: bedroom size the household is eligible for
    c. **Urgent** column: shows if the household has been approved for one of the following priorities: terminal illness, over-housed or in-situ. To view the urgent type:
        i. Click **View button** *(Status Record Details page opens)*
        ii. Click **Priority tab** and scroll down to **Urgent Type** field
    d. **Modified** column: shows if the household has been approved for a modified unit
    e. **SP** column: shows if the household has been approved for special priority
8. Click **Household Member Tab** to review all the household members on the file. This information can be used to determine if the household qualifies for the bedroom size they have expressed interest in. The following is displayed:
    a. Household member information such as name, date of birth, age, gender.
9. Click **Incomes tab** to review the income of household members 16 years and up
10. Click **Documents tab** to review documents that have been uploaded by the household, such as Status in Canada or Notice of Assessment

11. Click **Notes tab** to review and add notes on the applicant's file
12. Click **PWAD Arrears tab** to begin the process of conducting an arrears checks for all applicants over the age of 16 at the time of offer
13. Click **Service Tickets tab** to create a service ticket for Access to Housing.

Process ends

How to Upload a Document in an Applicant's File

Notes for Housing Provider

- It is the housing provider's responsibility to upload necessary documents to an applicant's file, when applicable. Such necessary documents are:
    - Notice of Decision-Over-Housed
    - copy of original market rent lease
    - approval letter for in-situ
- If uploading a Status in Canada document or a Notice of Assessment, select the appropriate applicant's name and the corresponding field listed in the Documents tab and follow process outlined below to upload the document. For these types of documents, do not use the 'Optional-Scan other household documents' field.

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click on the **Applications Filter tile** *(Application page opens)*
3. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name, last name and/or date of birth
4. Click **Find button** *(a list of potential matches will appear)*
5. Click on the applicant's name to open the profile (*Application page opens)*
6. Click **Documents tab** *(Upload document page opens)*
7. Click Optional-Scan other household documents
8. Click **Upload button** *(Upload document pop up opens)*
9. Click **Choose file** *(Pop up opens)*
10. Select **Document** to upload from your computer directory
11. Click **Open**
12. Click **Upload**

Process ends

How to Add a Note to an Applicant File

System Steps

1. Log into RentCafe-Site Manager (Social housing dashboard page opens)
2. Click on the **Applications Filter tile** (Application page opens)
3. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name, last name and/or date of birth
4. Click **Find button** (a list of potential matches will appear)
5. Click on the applicant’s name (Application page opens)
6. Click **Notes tab**
7. Click **Add Note button**
8. Select Note type in the drop down, for example, Housing Provider General Note
9. Enter a detailed note
10. Click Save

Process ends

Don’t forget to always “Sync” RentCafe to ensure the most update to date information is displayed.

How to Search for a Property and a Unit

Notes for Housing Provider

- When entering a unit number in the unit field:
    - If the unit number populates, this indicates that the unit already exists in your unit inventory
    - If the unit number does not populate and 'no match' displays, it is not in your unit inventory. Refer to the process document How to Add a Unit

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*

Process ends

How to Change a Modified Unit Flag

Notes for Housing Provider

- If a unit is modified, it must be flagged as modified in RentCafe as this controls which applicants are eligible for this unit type
- This process outlines how to change the modified flag on a unit by either adding or removing the modified flag
- The modified flag cannot be added or removed by a housing provider. A request must be submitted to Access to Housing to have this action completed

System Steps

1. Send an email to ProviderTechSupport@toronto.ca with the subject line 'Request to Add/Remove Modified Unit Flag **– [Property address] – [Unit number]'.** In the email body, provide:
    a. Property address
    b. Unit number
    c. Include a list of features that make the unit modified or non-modified
2. Await a reply from Access to Housing, which will confirm when the modified flag has been updated

Process ends

Choice-Based Materials

Vacancy Submission Checklist

Notes for Housing Provider

- Refer to this checklist summary when uploading property and unit photos, property and unit amenities and floor plans
- There are also reminders of the requirements of photos and alt-text
- For the detailed process, refer to the following process documents:
    - Alt-Text Guidelines
    - How to Upload Property Images
    - How to Upload Unit Photos
    - How to Enter Property Amenities and Common Unit Amenities
    - How to Enter Unit Amenities
    - How to Upload a Floor Plan

Property Photos

Select Property – Property configuration – Content and settings – Photo gallery

1. Upload exterior building and common area photos
    a. Photo requirements:
        - File type is .jpg .bmp or .png
        - File size under 500 MB
        - Image size 720 pixels x 720 pixels
        - File name does not include special characters, such as \/: *? "<>|#%+&.'

2. Provide alt text:
    - Less than 200 characters
    - Photos must have a brief description of the purpose and content of the space. For example, "Recreation room with television and sound system"

Unit Photos

Company Configuration – Compliance Management - Review units - Add images - Fill in building and unit info

1. One photo of each space in the unit interior of the vacancy or a similar unit
    a. Unit photo requirements:
        - File type is .jpg .bmp or .png
        - File size under 500 MB

    - Image size 720 pixels x 720 pixels
    - File name does not include special characters, such as \/: *? "<>|#%+&.'
    - The image file name should indicate: “propertyaddress_floorplan.jpg” such as 176ElmStreet_1B.jpg. The file name must not include the unit number.

2. Provide alt-text:
    - Less than 200 characters
    - Photos must have a brief description of the purpose and content of the space. For example, “Bathroom with a three-piece toilet and bath with small vanity cabinet.”

How to Submit a Vacancy for Choice-Based

Notes for Housing Provider

- housing providers must upload the property and building images. For more information, refer to the following process documents:
  - How to Upload a Property Images
  - How to Upload Unit Photos

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Upload **Property Images**, if not already done, as per the relevant process document
11. Upload **Unit Images**, if not already done, as per the relevant process document
12. Click **Amenities button** in the Unit Amenities column
13. Click the **checkbox** to include unit amenities
14. Click **Save**
15. Click **Status button** *(Choice-Based Status page opens)*
16. Select **Ready for Review** in Choice-Based Status dropdown
17. Click **Save**
18. Cycle Management reviews the vacancy posted for a cycle to ensure it meets the vacancy requirement. The result will be either:
    a. **Reviewed Accepted** – Choice-Based status changes to Accepted and the vacancy will be entered in a Choice-Based cycle.
    b. **Reviewed Rejected** – Unit Status changes to Rejected and the vacancy will not be entered in a Choice- Based Cycle
19. If the vacancy is reviewed rejected, click **History button** in the Unit History column

20. Review the **Note** in the Description column for the reason the vacancy was rejected
21. Make the corrections as stated in the rejection reason
22. Click **Status button** in the Sync/Update Column *(opens Choice-Based Status)*
23. Select **Ready for Review** in Choice-Based Status dropdown
24. Click **Save**

Process ends

How to Upload Property Images

Notes for Housing Provider

- When adding alternative text to describe an image, the description needs to be brief, easy to understand, clear and concise. For more information, review the process document Alt-Text Guidelines

System Steps when Uploading One Image

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Click **Add Images button** *(Add Images page opens)*
6. Enter **Property Address** in the Property field *(potential matches will appear)*
7. Click **Property name**
8. Click **Add Images button**
9. Click **Choose File**
10. Select **image** to upload from your computer directory
11. Click **Open button** to upload files
12. Click **Edit** on thumbnails to add **Alternative text** *(Edit image opens)*
13. Enter information in the **Alternative text** for description of the uploaded image
14. Click **Save Image**

Process ends

System Steps when Uploading Multiple Images

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Properties** from the top banner
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Click **Add Images button** *(Add Images page opens)*
6. Enter **Property Address** in the Property field *(potential matches will appear)*
7. Click **Property name**
8. Click **Add Images button**
9. Click **Choose File**
10. Select **all the images** to be uploaded from your computer directory
11. Click **Open button** to upload files
12. Click **Edit** on the thumbnails to add **Alternative text** *(Edit image opens)*

13. Enter information in the **Alternative text** for description of the uploaded image
14. Repeat steps 15 and 16 for all uploaded images
15. Click **Save Image**

Process ends

How to Enter Property Amenities and Common Unit Amenities

Notes for Housing Provider

- Amenities should be updated any time changes are made at the property or unit level

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Select Property** from the top banner
3. Enter **Property Address** in the search field on the right side (*potential matches will appear)*
4. Click the applicable **property address** listed *(Property information page opens)*
5. Click **Compliance Management tab**
6. Click **Choice-Based Configuration menu** *(the system populates the amenities template)*
7. Click the **checkbox** to **exclude amenities <u>not</u> available** in the building
8. Optional: Add text in the **Additional Description** field if any amenity needs further information or explanation
9. Click **Save**

Process ends

How to Upload a Floor Plan

Notes for Housing Provider

- When adding alternative text to describe an image, the description needs to be brief, easy to understand, clear and concise. For more information, review the process document Alt-Text Guidelines

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click Compliance Management tab
4. Click **Review Units tab** *(Review unit page opens)*
5. Click **Add Images button** *(Add Images page opens)*
6. Enter **Property Address** in the Property field *(potential matches will appear)*
7. Click **Property name**
8. Enter **Property Floor Plan** in **Floor Plan** field. For example, 1 bedroom
9. Enter **Unit Number** in **Unit** field
10. Click **Add Images button**
11. Click **Choose File**
12. Select **floor plan image** to upload from your computer directory
13. Click **Open**
14. Enter information in the **Alternative text** for description of the uploaded image
15. Click **Save Image**

Process ends

Alt-Text Guidelines

Alternative-Text (Alt-Text) is used to describe the content of the images that housing providers are uploading to meet accessibility requirements. Here are guidelines for including alt-text in RentCafe.

- Keep it short and descriptive, no more than 200 characters.
- Describe what the picture is showing and consider the context is for a potential tenant
- Do not include the words “image of” or “photo of”
- No need to repeat what has been included in the building and unit amenities, such as unit orientation or number of bedrooms.
- Consider if the alt-text, as written, contributes to someone's understanding of the unit and if it is suitable to them as a tenant. Does the alt-text provide an adequate description of the property and unit images provided?

Property Level Images Examples:

- "Building lobby entrance with ramp and large foyer"
- "Building laundry room with multiple windows and 8 visible washers and 6 visible dryers"

Unit Level Images Examples:

- "Unit interior main room, floor to ceiling window at the center and doors on left and right walls"
- "Unit kitchen, galley style with upper and lower cupboards on both sides and interior door at end"
- "Floor Plan L shaped layout with bedroom on short end, living area on long end and entry and kitchen at the intersection"

How to Upload Unit Photos

Notes for Housing Provider

- When adding alternative text to describe an image, the description needs to be brief, easy to understand, clear and concise. For more information, review the process document Alt-Text Guidelines

System Steps when Uploading One Photo

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Click **Add Images button** *(Add Images page opens)*
6. Enter **Property Address** in the Property field *(potential matches will appear)*
7. Click **Property name**
8. Enter **Property Floor Plan** in ***Floor Plan*** field. For example, 1 bedroom
9. Enter **Unit Number** in **Unit** field
10. Click **Add Images button**
11. Click **Choose File**
12. Select Image to upload from your computer directory
13. Click **Open button**
14. Enter information in the **Alternative text** for description of the uploaded image
15. Click **Save Image**

Process ends

System Steps when Uploading Multiple Photos

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Click **Add Images button** *(Add Images page opens)*
6. Enter **Property Address** in the Property field *(potential matches will appear)*
7. Click **Property name**
8. Enter **Property Floor Plan** in Floor Plan field. For example, 1 bedroom
9. Enter **Unit Number** in **Unit** field
10. Click **Add Images button**

11. Click **Choose File**
12. Select **all the images** to be uploaded from your computer directory
13. Click **Open button**
14. Click **Edit** on the thumbnails to add **Alternative text** *(Edit image opens)*
15. Enter information in the **Alternative text** for description of the uploaded image
16. Repeat steps 14 and 15 for all uploaded images
17. Click **Save Image**

Process ends

How to Enter Unit Amenities

Notes for Housing Provider

- Amenities should include all amenities that are specific or different for the particular unit. For example, some units in a building are carpeted and some are non-carpeted, so both amenities are included on the property level. When entering unit amenities, this is the place to check that this particular unit is carpeted.

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Click **Amenities button** in the Unit Amenities column
11. Click the **checkbox** to include unit amenities
12. Click **Save**

Process ends

How to Change a Choice-Based Status

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click Compliance Management tab
4. Click **Review Units tab** *(Review unit page opens)*
5. Select the **Unit Status** in the **Unit Status Field.** For example, Available for Offer - Pending
6. Enter property address or property name in the **Property field** *(potential matches will appear)*
7. Click **Property name**
8. Enter unit number in the **Unit Field** *(potential matches will appear)*
9. Click **Unit number**
10. Click **Find button** *(Property and unit information will appear)*
11. Click **Status button** *(Choice-Based status pop up opens)*
12. Select appropriate **Unit Status** in the Choice-Based Status field dropdown menu**.** For example, Ready for Review
13. Click **Save**

Process ends

How to Determine if a Unit is in a Current Cycle

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Select the **Available for Offer and Available-local Priority** in the **Unit Status** field
6. Enter property address or property name in the **Property field** *(potential matches will appear)*
7. Click **Property name**
8. Select the appropriate **Cycle** date from the dropdown menu in the **Cycle Name**
9. field. For example, 2022-May-19
10. Click **Find** *(Property information with unit displays)*
    a. If property and unit information display this means the unit(s) have been added to the current cycle
    b. If no property or unit(s) displays this means there are no units in the current cycle

Process ends

How to Place an Applicant “On Offer” through Choice-Based

Notes for Housing Provider

- Placing an applicant on offer links the applicant to the vacancy and by doing so, the application status changes to “On Offer” and the unit status changes to “On Offer”
- Part of placing an applicant “On Offer” includes doing an arrears check; these steps are included in this process
- Province Wide Arrears Database (PWAD)

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Select **Available for Offer** <u>and</u> **Available for Offer - local priority** in **Unit Status** field
6. Select **Cycle** in Cycle Name field. For example, 2022-sep-02
7. Enter property address or property name in the **Property field** *(potential matches will appear)*
8. Click **Property name**
9. Enter unit number in the **Unit Field** *(potential matches will appear)*
10. Click **Unit number**
11. Click **Find button** *(Property and unit information will appear)*
12. Click **Expression of Interest button** in Expression of Interest Column *(Current Cycle page opens displaying the name and applicant code of the highest ranking applicant)*
13. Click **Add offer** *(Offer Page opens)*
14. Click **Save**

System Steps to Check for Arrears

15. Click **Offers button** in Offer column *(Offers page opens)*
16. Click on the **Applicant name** to open applicant's file
17. Click **Arrears Tab**
18. Click **Check Arrears button**
19. Review the results displayed on screen. Sort the results by date using the 'RentCafe last checked column', to reference the most recent check. Potential

results could be:

  a. *"No Match Found" or*
  b. *Match found in which a full record will display with name, date of birth, amount owed, provider details and a score*

20. **If a match is not found,** proceed to call the applicant to make the offer

Process ends

Steps When an Arrears Match is Found

1. Email Access to Housing at ProvderTechSupport@toronto.ca ask them to verify the arrears match
   a. The subject line should be "On-Offer/Check Arrears Match"
   b. The email must include applicant code, applicant name, description of offer details and request for review of the PWAD match.
2. Call the applicant on offer to inform them of the possible PWAD match that is under review by Access to Housing.
3. If Access to Housing determines it is not a true match, proceed to call the applicant to make the offer
4. If Access to Housing determines it is a true match:
   a. Access to Housing will advise the housing provider that they cannot proceed with the housing offer
   b. Housing provider is to contact the applicant to advise the offer will be withdrawn due to the outstanding arrears
   c. Access to Housing will 'withdraw' the offer and communicate with the applicant on next steps regarding the arrears
   d. Housing Provider will proceed to place the next highest ranked applicant on offer

Process ends

To continue with the offer process, see the process document How to Complete the Offer Process.

How to Request a Vacancy be Excluded from Choice-Based

Notes for Housing Provider

- Before requesting a vacancy to be excluded from choice-based, the housing provider must ensure the vacancy is in RentCafe. For information on this, refer to the process document How to Determine if a Unit is in a Current Cycle

System Steps

1. Send an email to ProviderTechSupport@toronto.ca with the subject line **'Exclusion Request – [Property address] – [Unit number]'.** In the email body, provide:
    a. Property address
    b. Unit number
    c. Reason for exclusion from choice-based, for example, internal transfer – over-housed.
    d. Applicant code, if available
2. Await a reply from Access to Housing, which will confirm when the unit is excluded

Process ends

How to Determine if a Vacancy has been Excluded from Choice-Based

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Confirm the **box** is checked under the **Exclude From Cycle** column

Process ends

How to Place an Applicant "On Offer" through Internal Transfer - RGI to RGI

Notes for Housing Provider

- When placing an applicant "On Offer" by internal transfer – RGI, the housing provider will need the applicant code and the property must be listed in the applicants file under "Building Complex" tab
- Placing an applicant on offer links the applicant to the vacancy and by doing so, the application status changes to "On Offer" and the unit status changes to "On Offer"
- Part of placing an applicant "On Offer" includes doing an arrears check; these steps are included in this process
- Province Wide Arrears Database (PWAD)

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Click **Applicants button** in the **Choose Applicants** column *(Choose Applicant page opens)*
11. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name and/or last name.
12. Click **Find button** *(a list of potential matches will appear)*
13. Click on the applicant's name to open the profile (*Application page opens)*
14. Click **Offers button (***Offers page opens)*
15. Select **Internal Transfer-RGI** in Offer Type dropdown
16. Click **Date Offered** field *(Calendar opens)*
17. Select **Offer Date** from the Calendar
18. Click **Save**

System Steps to Check for Arrears

19. Click **Offers button** in Offer column *(Offers page opens)*
20. Click on the **Applicant name** to open applicant's file
21. Click **Arrears Tab**
22. Click **Check Arrears button**
23. Review the results displayed on screen. Sort the results by date using the 'RentCafe last checked column', to reference the most recent check. Potential results could be:
    a. *"No Match Found" or*
    b. *Match found in which a full record will display with name, date of birth, amount owed, provider details and a score*
24. **If a match is not found,** proceed to call the applicant to make the offer

Process ends

Steps When an Arrears Match is Found

1. Email Access to Housing at ProviderTechSupport@toronto.ca to ask them to verify the arrears match
    a. The subject line should be "On-Offer/Check Arrears Match"
    b. The email must include: applicant code, applicant name, description of offer details and request for review of the PWAD match.
2. Call the applicant on offer to inform them of the possible PWAD match that is under review by Access to Housing.
3. If Access to Housing determines it is **not a true match**, proceed to call the applicant to make the offer
4. If Access to Housing determines it is **a true match**:
    a. Access to Housing will advise the housing provider that they cannot proceed with the housing offer
    b. Housing provider is to contact the applicant to advise the offer will be withdrawn due to the outstanding arrears
    c. Access to Housing will 'withdraw' the offer and communicate with the applicant on next steps in regards to the arrears
    d. Housing Provider will proceed to place the next highest ranked applicant on offer

Process ends

To continue with the offer process, see the process document How to Complete the Offer Process.

How to Place an Applicant “On Offer” through Internal Transfer – Over-Housed

Notes for Housing Provider

- When placing an applicant on offer for internal transfer over-housed, the housing provider will need the applicant code and the property must be listed in the applicants file under 'Building Complex' tab
- Placing an applicant on offer links the applicant to the vacancy and by doing so, the application status changes to “On Offer” and the unit status changes to “On Offer”
- Part of placing an applicant “On Offer” includes doing an arrears check; these steps are included in this process
- Province Wide Arrears Database (PWAD)

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Click **Applicants button** in the **Choose Applicants** column *(Choose Applicant page opens)*
11. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name or last name.
12. Click **Find button** *(a list of potential matches will appear)*
13. Click on the applicant’s name to open the profile (*Application page opens)*
14. Click **Offer button** ***(****Offer page opens)*
15. Select **Internal transfer-Over housed** in Offer Type drop down
16. Click **Date Offered** field *(Calendar opens)*
17. Select **Offer Date** from the Calendar
18. Click **Save**

System Steps to Check for Arrears

19. Click **Offers button** in Offer column *(Offers page opens)*
20. Click on the **Applicant name** to open applicant's file
21. Click **Arrears Tab**
22. Click **Check Arrears button**
23. Review the results displayed on screen. Sort the results by date using the 'RentCafe last checked column', to reference the most recent check. Potential results could be:
    a. *"No Match Found" or*
    b. *Match found in which a full record will display with name, date of birth, amount owed, provider details and a score*
24. **If a match is not found,** proceed to call the applicant to make the offer

Process ends

Steps When an Arrears Match is Found

1. Email Access to Housing at ProviderTechSupport@toronto.ca to ask them to verify the arrears match
    a. The subject line should be "On-Offer/Check Arrears Match"
    b. The email must include: applicant code, applicant name, description of offer details and request for review of the PWAD match.
2. Call the applicant on offer to inform them of the possible PWAD match that is under review by Access to Housing.
3. If Access to Housing determines it is **not a true match**, proceed to call the applicant to make the offer
4. If Access to Housing determines it is **a true match**:
    a. Access to Housing will advise the housing provider that they cannot proceed with the housing offer
    b. Housing provider is to contact the applicant to advise the offer will be withdrawn due to the outstanding arrears
    c. Access to Housing will 'withdraw' the offer and communicate with the applicant on next steps in regards to the arrears
    d. Housing Provider will proceed to place the next highest ranked applicant on offer

Process ends

To continue with the offer process, see the process document How to Complete the Offer Process.

How to Place an Applicant “On Offer” In-Situ – Market Rent to RGI

Notes for Housing Provider

- When placing an applicant “On Offer” for in-situ, the housing provider will need the applicant code and the property must be listed in the applicants file under 'Building Complex' tab.
- Placing an applicant on offer links the applicant to the vacancy and by doing so, the application status changes to “On Offer” and the unit status changes to “On Offer”
- Part of placing an applicant “On Offer” includes doing an arrears check; these steps are included in this process
- Province Wide Arrears Database (PWAD)

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Click **Applicants button** in the **Choose Applicants** column *(Choose Applicant page opens)*
11. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name and/or last name.
12. Click **Find button** *(a list of potential matches will appear)*
13. Click on the applicant’s name to open the profile (*Application page opens)*
14. Click **Offers button (***Offers page opens)*
15. Select **Market to RGI** in Offer Type dropdown
16. Click **Date Offered** field *(Calendar opens)*
17. Select **Offer Date** from the Calendar
18. Click **Save**

System Steps to Check for Arrears

19. Click **Offers button** in Offer column *(Offers page opens)*
20. Click on the **Applicant name** to open applicant's file
21. Click **Arrears Tab**
22. Click **Check Arrears button**
23. Review the results displayed on screen. Sort the results by date using the 'RentCafe last checked column', to reference the most recent check. Potential results could be:
    a. *"No Match Found" or*
    b. *Match found in which a full record will display with name, date of birth, amount owed, provider details and a score*
24. **If a match is not found,** proceed to call the applicant to make the offer

Process ends

Steps When an Arrears Match is Found

1. Email Access to Housing at ProviderTechSupport@toronto.ca to ask them to verify the arrears match
    a. The subject line should be "On-Offer/Check Arrears Match"
    b. The email must include applicant code, applicant name, description of offer details and request for review of the PWAD match.
2. Call the applicant on offer to inform them of the possible PWAD match that is under review by Access to Housing.
3. If Access to Housing determines it is **not a true match**, proceed to call the applicant to make the offer
4. If Access to Housing determines it is **a true match**:
    a. Access to Housing will advise the housing provider that they cannot proceed with the housing offer
    b. Housing provider is to contact the applicant to advise the offer will be withdrawn due to the outstanding arrears
    c. Access to Housing will 'withdraw' the offer and communicate with the applicant on next steps regarding the arrears
    d. Housing Provider will proceed to place the next highest ranked applicant on offer

Process ends

To continue with the offer process, see the process document How to Complete the Offer Process.

How to Place an Applicant "On Offer" Through Referral Agreement

Notes for Housing Provider

- When placing an applicant on offer by a referral agreement, the housing provider will need the applicant code and the property must be listed in the applicants file under "Building Complex" tab
- Placing an applicant on offer links the applicant to the vacancy and by doing so, the application status changes to "On Offer" and the unit status changes to "On Offer"
- Part of placing an applicant "On Offer" includes doing an arrears check; these steps are included in this process
- Province Wide Arrears Database (PWAD)

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click Compliance Management tab
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Click **Applicants button** in the **Choose Applicants** column *(Choose Applicant page opens)*
11. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name and/or last name.
12. Click **Find button** *(a list of potential matches will appear)*
13. Click on the applicant's name to open the profile (*Application page opens)*
14. Click **Offers button (***Offers page opens)*
15. Select **Referral Agreement** in Offer Type dropdown
16. Click **Date Offered** field *(Calendar opens)*
17. Select **Offer Date** from the Calendar
18. Click **Save**

System Steps to Check for Arrears

19. Click **Offers button** in Offer column *(Offers page opens)*
20. Click on the **Applicant name** to open applicant's file
21. Click **Arrears Tab**
22. Click **Check Arrears button**
23. Review the results displayed on screen. Sort the results by date using the 'RentCafe last checked column', to reference the most recent check. Potential results could be:
    a. *"No Match Found" or*
    b. *Match found in which a full record will display with name, date of birth, amount owed, provider details and a score*
24. **If a match is not found,** proceed to call the applicant to make the offer

Process ends

Steps When an Arrears Match is Found

1. Email Access to Housing at mailto:Helpdesk_MyAccesstoHousingTO@toronto.caProviderTechSupport@toronto.ca to ask them to verify the arrears match
    a. The subject line should be "On-Offer/Check Arrears Match"
    b. The email must include applicant code, applicant name, description of offer details and request for review of the PWAD match.
2. Call the applicant on offer to inform them of the possible PWAD match that is under review by Access to Housing.
3. If Access to Housing determines it is not a true match, proceed to call the applicant to make the offer
4. If Access to Housing determines it is a true match:
    a. Access to Housing will advise the housing provider that they cannot proceed with the housing offer
    b. Housing provider is to contact the applicant to advise the offer will be withdrawn due to the outstanding arrears
    c. Access to Housing will “withdraw” the offer and communicate with the applicant on next steps regarding the arrears
    d. Housing Provider will proceed to place the next highest ranked applicant on offer

Process ends

To continue with the offer process, see the process document How to Complete the Offer Process.

Offer Process

How to Make an Offer by Email

Notes for Housing Provider

- The senders email address will automatically be populated
- In the offer template, do not state the unit number, only the property address
- In the offer template, the deadline to call back date **must be 48 hours from the time of the email being sent**

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click on the **Applications Filter tile** *(Application page opens)*
3. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name, last name and/or date of birth
4. Click **Find button** *(a list of potential matches will appear)*
5. Click on the applicant's name to open the profile (*Application page opens)*
6. Click **Notes tab**
7. Click **Add Note button**
8. Select **Housing Offer Email** in the **Note type** dropdown menu *(template opens)*
9. Replace the following templated text, which appears in red font, with the **specific offer information** before sending to applicant:
    a. **Insert address only not unit number**
    b. **Insert date (deadline date must be 48 hours from the time of email being sent)**
    c. **Housing Provider Name**
    d. **Contact Name**
    e. **Phone number**
10. Select the **'send email to applicant' checkbox**
11. Input '**RGI Housing Offer'** in the email subject
12. Click **Save**

Process ends

How to Reset to On Offer from Accepted Status

Notes for Housing Provider

- A housing provider can change a unit status from 'accepted' back to “On Offer” if the applicant changes their mind to not to accept the offer before moving in

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Select **Accepted** in Unit Status field dropdown
6. Enter property address or property name in the **Property field** *(potential matches will appear)*
7. Click **Property name**
8. Enter unit number in the **Unit Field** *(potential matches will appear)*
9. Click **Unit number**
10. Click **Find button** *(Property and unit information will appear)*
11. Click **Offers Button** in Offer column
12. Click **Edit** *(Pop up opens)*
13. Click **Reset to On Offer** button
14. Select **On Offer** in Unit Status field dropdown
15. Click **Find** *(Property and unit information including updated status will appear)*

Process ends

Offer Outcomes

Notes for Housing Provider

- An applicant must be “On Offer” to complete the system steps outlined in the offer process. For the system steps, see the process document How to Place an Applicant On Offer. Once an applicant is placed on offer, the vacancy and the unit status changes to “On Offer”
- There are several different phases of the offer process depending on the outcome. Each phase is outlined below, along with the subsequent system steps.

System Steps

System steps for when an applicant agrees to view the unit:

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Click **Offer** button in the Offer column *(Offers page opens)*
11. Click **Edit** *(Offer page opens)*
12. Select **Verbal Acceptance** in Secondary status.
13. Click **Verbal Accepted Date** field *(Calendar opens)*
14. Choose the **Date** from the calendar
15. Enter a detailed **Note** for the offer process in Note field
16. Click **Save**

System steps for when an applicant has viewed the unit, accepted the offer and a lease signing is scheduled:

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches*

will appear)

6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Click **Offer** button in the Offer column *(Offers page opens)*
11. Click **Edit** *(Offer page opens)*
12. Select **'Accepted'** from the drop-down menu in the **Offer Status** field
13. Click **Date Accepted** field *(Calendar opens)*
14. Choose the date from the calendar. Enter the date the lease will be signed.
15. Click **Move In Date** Field *(Calendar opens)*
16. Choose the date from the calendar. This is the estimated move-in date.
17. Enter a detailed updated note for the offer process in **Note** field
18. Click **Save**

System steps for when an applicant has refused the offer:

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Click **Offer** button in the Offer column *(Offers page opens)*
11. Click **Edit** *(Offer page opens)*
12. Select “**Refused**” from the drop down menu in the **Offer Status** field
13. Click **Refusal Date** field *(Calendar opens)*
14. Choose the date from the calendar
15. Select **Refusal Reason** from the drop down in **Refusal Reason** field.
16. Enter a detailed **Refusal reason** in the **Refusal Details** field
17. Click **Save**

Process ends

System steps for when an offer is a withdrawal:

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Click **Offer** button in the Offer column *(Offers page opens)*
11. Click **Edit** *(Offer page opens)*
12. Select '**Withdrawal'** from the drop-down menu in the **Offer Status** field
13. Click **Withdrawal Date** field *(Calendar opens)*
14. Choose the date from the calendar
15. Select **Withdrawal Reason** from the drop down in **Withdrawal Reason** field.
16. Enter a detailed **Withdrawal reason** in the **Withdrawal Details** field
17. Click **Save**

Process ends

System steps for when an offer is declined to offer:

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Click **Offer** button in the Offer column *(Offers page opens)*
11. Click **Edit** *(Offer page opens)*

12. Select **'Declined to Offer'** from the drop down menu in the **Offer Status** field
13. Click **Declined to Offer Date** field *(Calendar opens)*
14. Choose the date from the calendar
15. Select **Declined to Offer Reason** from the drop down in **Declined to Offer Reason** field
16. Enter a detailed **Declined to Offer reason** in the **Declined to Offer Details** field
17. Click **Save**

Process ends

How to Complete the Offer Process

System steps for when an applicant accepted the unLog into RentCafe-Site Manager *(Social housing dashboard page opens)*

1. Click **Show Menu**
2. Click **Compliance Management tab**
3. Click **Review Units tab** *(Review unit page opens)*
4. Enter property address or property name in the **Property field** *(potential matches will appear)*
5. Click **Property name**
6. Enter unit number in the **Unit Field** *(potential matches will appear)*
7. Click **Unit number**
8. Click **Find button** *(Property and unit information will appear)*
9. Click **Offer** button in the Offer column *(Offers page opens)*
10. Click **Edit** *(Offer page opens)*
11. Select **Accepted** in Secondary status.
12. Choose the **Date** from the calendar
13. Enter a detailed **Note** for the offer process in Note field
14. Click **Save**
15. **Click on the offer button**
16. **Click on the Submit to Voyager Button**

Process ends

Current Household Processes

How to Create an Over-Housed Application for a New File

Notes for Housing Provider

- When a housing provider needs to add an over-housed tenant to the CWL, they must search RentCafe for an existing file.
    - **If an application is not found**, the housing provider is to proceed to create a new application as per this process
    - **If an existing file is found**, in eligible status, use the existing file to flag as over-housed on the CWL, as per the How to Create an Over-Housed Application from Eligible Status
- It is important for a service ticket to be created, so that the Over-housed indictor can be added to household's file. A ticket is triggered for Access to Housing to add the over-housed indicator

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click on the **Applications Filter tile** *(Application page opens)*
3. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name, last name and/or date of birth
4. Click **Find button** *('no data available' will display)*
5. Click **Create Application & Service Ticket button** on the top right corner of the page *(New application pop up opens)*
6. Select **No** from "Is the application already associated with a tenant?" dropdown
7. Select **Over-housed- New Application Checklist** from Service Ticket Template dropdown
8. Enter the following fields based on applicant information. The information entered should match the Status in Canada document.
    a. First name
    b. Last name
    c. Date of birth
9. Click **Save** *(Application page opens)*
10. Click **Household Member tab**
11. Click **Edit button** *(Tell Us About Applicant page opens)*
12. Enter the following applicant information:
    a. First name
    b. Last name

c. Select Appropriate Status in Canada
d. Date of birth
e. Select **Yes** or **No** in “Are you a Full-time student?” field?

13. Click **Next**
14. Enter the following applicant information in the **Address tab** based on Applicant's current address
    a. Mailing Street Number and Street Name
    b. Mailing Unit Number
    c. Mailing City
    d. Mailing Province
    e. Mailing Postal code
15. Click the **checkbox** if current address is the same as mailing address. If **<u>not</u>**
16. enter the following:
    a. Current Street Number and Street Name
    b. Current Unit Number
    c. Current City
    d. Current Province
    e. Current Postal code
17. Select **Yes** in the “Is this a rent-geared-to-income unit?” field
18. Click **Next**
19. Enter applicant information in the **Contact Tab**:
    a. Email address
    b. Does applicant receive email. A confirmation window opens. Click Accept.
    c. Phone number (must enter at least one phone number)
    d. Select the primary phone type in the Primary Phone Type field
20. Click **Next**
21. If there is no alternative contact, leave blank and go step 24. If there is an
22. **alternative contact**, enter the following information:
    a. Contact Name
    b. Contact Relationship
    c. Contact Phone Number
    d. Contact Email
23. Click **Next**
24. Answer **Other** question

25. Select an option from the dropdown for **‘**In Canada, the term "Indigenous” includes First Nations, Inuit and Metis. Do you identify with any of these three groups?’ field
26. Click **Next** *(Returns to application page)*
27. Click **Add Co-applicant button** if applicable *(*T*ell us About Co-applicant page opens)*
28. Enter the following **Co-applicant** information:
    a. First name
    b. Last name
    c. Status in Canada
    d. Date of birth
    e. Relation to applicant
    f. Are you a full-time student?
29. Click **Next**
30. Click **Add Dependents button,** if applicable for children under the age of 16
31. Enter the following Dependent information:
    a. First name
    b. Last name
    c. Status in Canada
    d. Date of birth
    e. Relation to applicant
    f. Do you have custody/access agreement for this child?
32. Click **Save**
33. Click **Incomes tab**
34. Click **Add income** *(Tell Us About Your Income page opens)*
35. Select **Name** (Applicant's name) in 'Who does the income belong to?' field.
36. Select **Notice of Assessment** in Income Document type field
37. Select **How often income** (Annual) is paid in the How often is the income paid
38. Enter **Amount** in how much income field
39. Click **Save**
40. Repeat steps 36 – 40 to enter the income information for all applicants added to the file over the age of 16.
41. Click **Documents tab** *(Upload document page opens)*
42. Click **Upload** in Notice of Assessment field *(Upload document page opens)*
43. Click **Choose file**

44. Select the file **(most recent Notice of Assessment)** to upload from your computer directory
45. Click **Open**
46. Click **Upload**
47. Repeat steps 42 – 47 to upload the Notice of Assessment for any household member over the age of 16
48. Click **Upload** in 'Provide document showing proof of Canadian Citizenship' field
49. *(Upload document pop up page opens)*
50. Click **Choose file**
51. Select the **Status document** to upload from your computer directory
52. Click **Open**
53. Click **Upload**
54. Repeat steps 49 – 53 to upload a Status document for all household members
55. Click **Upload** in the Optional-Scan other household document field *(Upload document page opens)*
56. Click **Choose file**
57. Select the file (the **Notice of Decision-Over-housed** that was given to the household) to upload from your computer directory
58. Click **Open**
59. Click **Upload**
60. Click **Notes tab**
61. Click **Add Note**
62. Select **Housing Provider General Note** in the Note type dropdown menu
63. Enter **detailed note.** For example, 'created application for over-housed tenant' or explanation if provider entered information that was different from what was included on the Notice of Decision-Over-housed form
64. Click **Save**
65. Click **Service Tickets tab**
66. Click **Edit** for the Service Ticket named 'Over-housed-New Application Checklist' (*Edit Service ticket page opens)*
67. Select **In-Progress-In-Progress** in Status dropdown menu
68. Click **Save**
69. Click **Tasks tab** (*a required checklist displays)*
70. Review **Tasks**
71. Click the **checkbox** for each completed task

72. Click **Save**
73. Click **Service Ticket tab** *(the status changes to Closed)*
74. Close the Edit Service Ticket page by clicking the x in the top right corner

Process ends

How to Create an Over-Housed Application for Eligible File

Notes for Housing Provider

- It is important to review the household composition and update by adding or deactivating household members
- For any co-applicant or dependent added to a file, the housing provider must upload the member's status in Canada and Notice of Assessment for anyone over the age of 16
- It is important for a service ticket to be created, so that the Over-housed indictor can be added to household's file. A ticket is triggered for Access to Housing to add the over-housed indicator

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click on the **Applications Filter tile** *(Application page opens)*
3. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name, last name and/or date of birth
4. Click **Find button** *(a list of potential matches will appear)*
5. Click on the applicant's name to open the profile (*Application page opens; defaults to the Status tab)*
6. Confirm applicant file's **current status is Eligible** at the top of the page or under the status column
7. Click **Household Member tab**
8. Click **Edit** for Head of Household *(Tell Us About Applicant page opens)*
9. Click **Address tab** *(Address information displays)*
10. Verify the address is currently where the household lives; update if necessary
11. Click **Save**
12. Review the household members listed to determine if household composition needs to be updated (members to be added or removed)
13. If applicable, to remove any household members who are not part of the current tenancy, click **Deactivate button** (*Confirmation Message pops up) and* click **Ok**
14. If applicable, to add members to the household composition, click **Add Co-applicant button** *(Tell us About Co-applicant page opens)*
15. Enter the following **Co-applicant** information:
    a. First name
    b. Last name
    c. Status in Canada

d. Date of birth
e. Relation to applicant
f. Are you a full-time student?

16. Click **Next**
17. If applicable, to add members to the household composition, click **Add Dependents button** for children under the age of 16
18. Enter the following **Dependent** information:
    a. First name
    b. Last name
    c. Status in Canada
    d. Date of birth
    e. Relation to applicant
    f. Do you have custody/access agreement for this child?
19. Click **Save**
20. Click **Documents tab**
21. If applicable for new members added, upload **Status in Canada document** for each household member in their respective fields beside their names
22. If applicable for new members added over the age of 16, upload **Notice of Assessment** in their respective fields beside their names
23. Click **Service Tickets tab**
24. Click **Add Service Ticket button** *(Add service ticket page opens)*
25. Select from Template dropdown
26. Select **Over-housed**
27. Click **Save**
28. Click **Upload** in the Optional-Scan other household document field *(Upload document page opens)*
29. Click **Choose file**
30. Select the file (the **Notice of Decision-Over-housed** that was given to the household) to upload from your computer directory
31. Click **Open**
32. Click **Upload**
33. Click **Notes tab**
34. Click **Add Note**
35. Select **Housing Provider General Note** in the Note type dropdown menu
36. Enter **detailed note.** For example, 'created application for over-housed tenant' or

explanation if provider entered information that was different from what was included on the Notice of Decision-Over-housed form

37. Click **Save**

Process ends

How to Add a Tenant to the In-Situ List – Building Complex – Applicants Currently Residing (BCACR) Report

Notes for Housing Provider

- A tenant must have an eligible application on the Centralized Waiting List (CWL)Search for the application. If an application cannot be found, contact Access to Housing by email
- (ProviderTechSupport@toronto.ca). They will do a thorough search.
- Access to Housing will advise you of the outcome of their search. If they:
    - **Confirm application was found**, they will provide you with the application code that you can use to search the application
    - **Confirm application is not found**, you can advise the tenant to apply through MyAccesstoHousingTO. Once they have applied, the housing provider should then email ProviderTechSupport@toronto.ca advising of the pcode to request that an RGI eligibility review is conducted for the purposes of the household applying for in-situ
- The original market rent lease must be uploaded to applicant's file

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click on the **Applications Filter tile** *(Application page opens)*
3. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name, last name and/or date of birth
4. Click **Find button** (*a list of potential matches will appear)*
5. Click on the applicant's name to open the profile (*Application page opens)*
6. Click **Household Members Tab**
7. Review the household members listed to make sure they match those of tenancy. Update if necessary.
    a. If household members need to be added, click **Add Co-Applicants** or
8. **Add Dependents button.** Enter in household member information.
9. Upload their status in Canada document in the ***Document Tab***
    a. If household members need to be removed, click the **Deactivate button**
10. Place the over **Address Information**
11. Review the address on file to ensure the address matches the address they currently reside. Update if necessary. To update address:
    a. Click **Edit.**

b. Click the **Address tab.**
c. Enter mailing address and current address. Checkmark ‘Current address is the same as mailing address’, if applicable.
d. Click **Next.**

12. Click **Service Tickets Tab**
13. Click **Add Service Ticket button**
14. Select **Market Rent to RGI** in the Template dropdown menu
15. Click **Save**
16. Click **Document Tab**
17. Locate the row that states 'Optional – scan other household documents'. Click
18. **Upload** (*Upload document page opens)*
19. Click **Choose Files** to select the document that is the original market rent lease for the tenant, from your computer file directory
20. Click **Open**
21. Click **Upload**

Process ends - Access to Housing will review the request

How to Run the In-Situ List - BCACR Report

Notes for Housing Provider

- The report is called **Building Complex-Applicants Currently Residing** in RentCafe

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Reports** from the top banner
3. Place mouse on **Social Housing Tab** for a dropdown to display
4. Place mouse on **Application Reports** for a dropdown to display
5. Click **Building Complex-Applicants Currently Residing** *(Building Complex-Applicants Currently Residing page opens)*
6. Click **Housing Provider** dropdown menu, select **Provider name**
7. Click **Building Complex** dropdown menu, select the **Complex**
8. Click the **Application Status** dropdown menu, select **Eligible**
9. Click **Urgent Type** dropdown menu, select **Market to RGI**
10. Click **Run** Report *(Building Complex-Applicants Currently Residing Report opens)*
11. To email the report, click **Email Report**
12. Select **Export Type**, for example Excel or PDF
13. Enter **Email Address** to send report to
14. Enter a **Subject**
15. Enter a **Detailed email message** in the body
16. Click **Send Email**

Process ends

Mandated Housing Provider Processes

How to Add an Approved Applicant to a Building with a Mandate

Notes for Housing Provider

- An applicant must add the building preference to their building complexes in MyAccesstoHousingTO for the housing provider to approve it in RentCafe
- This process is not for senior buildings, it is only for buildings with mandates other than for seniors
- Only applicants approved for a building with a mandate are eligible for a housing offer at that building

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click on the **Applications Filter tile** *(Application page opens)*
3. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name, last name and/or date of birth
4. Click **Find button** *(a list of potential matches will appear)*
5. Click on the applicant's name to open the profile (*Application page opens)*
6. Click **Building Complexes Tab**
7. Locate the building based on the information listed or type the Building Complex name in the **Search Field**
8. Click **Update** *(Pop up page opens)*
9. Select **Approved** in New Status dropdown menu field
10. Enter **Date Approved**
11. Click **Save**

Process ends

How to Remove an Approved Applicant from a Building with a Mandate

Notes for Housing Provider

- A housing provider may decline to offer a unit due to an applicant who no longer meets a building's mandate
- Once the offer outcome is entered as a "Declined to Offer" in RentCafe, the housing provider needs to remove the approved building mandate from the applicant's file in RentCafe

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click on the **Applications Filter tile** *(Application page opens)*
3. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name, last name and/or date of birth
4. Click **Find button** *(a list of potential matches will appear)*
5. Click on the applicant's name to open the profile (*Application page opens)*
6. Click **Building Complexes Tab**
7. Locate the building based on the information listed or type the Building Complex name in the **Search Field**
8. Click **Update** *(Pop up page opens)*
9. Enter date in **Date Unapproved** field
10. Enter date in **Date Denied** field
11. Enter reason in **Denial Reason** field (i.e. applicant no longer meets building's mandate)
12. Click **Save**

Process ends

How to Deny an Applicant for a Building with a Mandate

Notes for Housing Provider

- As part of the process when an applicant applies to a housing provider's building with a mandate, if a housing provider confirms that the household is not eligible for the building's mandate, they are to communicate that directly with the applicant household and enter the denial of the building with the mandate in RentCafe.

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click on the **Applications Filter tile** *(Application page opens)*
3. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name, last name and/or date of birth
4. Click **Find button** *(a list of potential matches will appear)*
5. Click on the applicant's name to open the profile (*Application page opens)*
6. Click **Building Complexes Tab**
7. Locate the building based on the information listed or type the Building Complex name in the **Search Field**
8. Click **Update** *(Pop up page opens)*
9. Enter date in **Date Denied** field
10. Enter reason in **Denial Reason** field (i.e. applicant does not meet the building's mandate)
11. Click **Save**

Process ends

How to Place an Applicant “On Offer” through the Brochure Method

Notes for Housing Provider

- Housing providers with buildings with mandates are to use the brochure method to make a housing offer, unless informed otherwise by Access to Housing
- Placing an applicant on offer links the applicant to the vacancy and by doing so, the application status changes to “On Offer” and the unit status changes to “On Offer”
- Part of placing an applicant “On Offer” includes doing an arrears check; these steps are included in this process
- Province Wide Arrears Database (PWAD)

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Click **Offers button** in the Offers column *(a screen will open that will display 'no data available in table')*
11. Click on **Add Offer** to display the name and applicant code of the highest ranked applicant *(Offer Page opens)*
12. Click **Save**

System Steps to Check for Arrears

13. Click **Offers button** in Offer column *(Offers page opens)*
14. Click on the **Applicant name** to open applicant's file
15. Click **Arrears Tab**
16. Click **Check Arrears button**
17. Review the results displayed on screen. Sort the results by date using the 'RentCafe last checked column', to reference the most recent check. Potential results could be:
    a. *"No Match Found" or*

   b. *Match found in which a full record will display with name, date of birth, amount owed, provider details and a score*

18. **If a match is not found,** proceed to call the applicant to make the offer

Process ends

Steps When an Arrears Match is Found

1. Email Access to Housing at ProviderTechSupport@toronto.ca to ask them to verify the arrears match
   a. The subject line should be "On-Offer/Check Arrears Match"
   b. The email must include applicant code, applicant name, description of offer details and request for review of the PWAD match.
2. Call the applicant on offer to inform them of the possible PWAD match that is under review by Access to Housing.
3. If Access to Housing determines it is **not a true match**, proceed to call the applicant to make the offer
4. If Access to Housing determines it is **a true match**:
   a. Access to Housing will advise the housing provider that they cannot proceed with the housing offer
   b. Housing provider is to contact the applicant to advise the offer will be withdrawn due to the outstanding arrears
   c. Access to Housing will 'withdraw' the offer and communicate with the applicant on next steps in regards to the arrears
   d. Housing Provider will proceed to place the next highest ranked applicant on offer

Process ends

To continue with the offer process, see the process document How to Complete the Offer Process.

How to Save the Property Brochure to Send to an Applicant

Notes for Housing Provider

- Follow the steps below to save the brochure from RentCafe to your computer. The brochure can then be emailed to the applicant “On Offer”
- The property brochure should be emailed to the applicant after you have placed an applicant “On Offer” and have called to make the offer
- Sending the property brochure to an applicant by email is intended for housing providers who have an approved mandate and will fill the vacancy using the brochure method

System Steps

1. Log into RentCafe-Site Manager *(Social housing dashboard page opens)*
2. Click **Show Menu**
3. Click **Compliance Management tab**
4. Click **Review Units tab** *(Review unit page opens)*
5. Enter property address or property name in the **Property field** *(potential matches will appear)*
6. Click **Property name**
7. Enter unit number in the **Unit Field** *(potential matches will appear)*
8. Click **Unit number**
9. Click **Find button** *(Property and unit information will appear)*
10. Click on the **Info** button in the **Unit Info** column *(the unit information screen displays with the property name and unit number and a sub-heading displays 'Review Vacancy')*
11. Click on **Review Vacancy** heading *(Review Vacancy page opens)*
12. Click on the **print** button located in the middle, right side of screen (*Print options page displays)*
13. Click on **the Printer destination drop down menu** and select **Save as PDF**
14. Click **Save** to save the PDF to a folder on your computer. You can rename the PDF file. For example, “Brochure for Property name_______________ unit ___”

Process ends

How to Check for Arrears at Time of Offer

Notes for Housing Provider

- Province Wide Arrears Database (PWAD)
- All applicants must be checked for arrears at time of offer
- Applicant application status must be “On Offer”
- An arrears check will result in either no match found or match found
    - **If a match is not found,** the process ends as the housing provider is able to proceed to call the applicant to make the offer
    - **If a match is found,** Access to Housing must be contacted to verify if it is a true match. Depending on the results of this verification, the process will differ. Steps are outlined below

System Steps

1. Log into RentCafe-Site Manager (Social housing dashboard page opens)
2. Click on the **Applications Filter tile** (Application page opens)
3. Search for the applicant's file by entering known information in the search fields, such as the applicant code. If this is not known, enter known fields such as first name, last name and/or date of birth
4. Click **Find button** (a list of potential matches will appear)
5. Click on the applicant’s name to open the profile (Application page opens)
6. Click **PWAD Arrears Tab**
7. Click **Check Arrears button**
8. Review the results displayed on screen. Sort the results by date using the 'RentCafe last checked column', to reference the most recent check. Potential results could be:
    a. "No Match Found"; or
    b. Match found in which a full record will display with name, date of birth, amount owed, provider details and a score.
9. **If a match is not found,** proceed to call the applicant to make the offer

Process ends

Steps When an Arrear Match is Found

1. Email Access to Housing at ProviderTechSupport@toronto.ca to ask them to verify the arrears match
    a. The subject line should be "On-Offer/Check Arrears Match"
    b. The email must include applicant code, applicant name, description of

offer details and request for review of the PWAD match.

2. Call the applicant on offer to inform them of the possible PWAD match that is under review by Access to Housing.
3. If Access to Housing determines it is not a true match, proceed to call the applicant to make the offer
4. If Access to Housing determines it is a true match:
    a. Access to Housing will advise the housing provider that they cannot proceed with the housing offer
    b. Housing provider is to contact the applicant to advise the offer will be withdrawn due to the outstanding arrears
    c. Access to Housing will “withdraw” the offer and communicate with the applicant on next steps regarding the arrears
    d. Housing Provider will proceed to place the next highest ranked applicant on offer

Section 3: Reports

Voyager 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

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

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

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
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        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

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
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        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

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
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      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

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
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        viii. **Save to PDF –** The report will be downloaded in an PDF file with visual enhancements. PDF files can not have filters applied

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
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        viii. **Save to PDF –** The report will be downloaded in an PDF file with visual enhancements. PDF files can not have filters applied

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
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        viii. **Save to PDF –** The report will be downloaded in an PDF file with visual enhancements. PDF files can not have filters applied

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
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Process ends