Class Viewing Recommendations for New Property Management Staff

Please note this is a suggested training order in response to inquiries from our customers who are providing training to new property management professionals. Students may take any class in any order they prefer based on need. Each class is designed as a stand-alone topic and while we may make a recommendation to take one class before another, there is no requirements to do so. All of these classes reference RBD developed supporting policies and forms. Check out our RBD FASTForms library online to make a purchase.

Each class can be started, stopped or repeated as many times as necessary during the Viewing Period. **For those customers who wish to request an invoice, please note that the viewing period begins when payment is received.**

Please send any inquiries before, during or after training to onlinetraining@rbdnow.com.

Fair Housing for Federally Funded Properties Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days	1	Before interacting with any residents or applicants, property management professionals should have a strong understanding of the fair housing requirements for federally funded properties. This class provides an introduction to the various fair housing laws and requirements for federally funded properties. We begin with a discussion about discrimination and then review the Fair Housing Act, Section 504, Title VI including Limited English Proficiency (LEP), Sexual Harassment in Housing, the Equal Access Rule and the Violence Against Women Act. Interactive exercises are included.
HUD's Verification Requirements Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days	2	This class provides an explanation of HUD's Verification Requirements. Since 2013, HUD has introduced five major changes simplifying verification and reducing the overall burden of the verification task. However, most owner/agents are still using outdated, cumbersome verification methods. This class provides an explanation of how verification has changed in recent years and how current verification guidance can make this process easier. We include an explanation of: • Today's verification guidance, • The current definition of third-party verification (changed at the end of 2013), • Use of EIV for new certifications, • Use of EIV for retroactive certifications when a resident fails to fully and accurately disclose income • What to do when it is not possible to obtain third-party verification (e.g., new job) • What to do when it is not appropriate to obtain third-party verification (e.g., No Child Support) • How to document the file; and • HUD's recordkeeping requirements.
Annual Income & Verification of Income Basics Instructor: Mary Ross	3	This class explains income calculations including income inclusions and exclusions. Class includes an updated list of income inclusions and exclusions. This RBD OnDemand Training has been designed to

Recorded Time: 2 Hours Viewing Period 5 Days		introduce new property managers to the HUD Annual Income calculation. Students will learn: • Whose income counts; • Income Inclusions and Exclusions; • How to handle lump sums received for delayed unemployment benefits; • Income verification including use of EIV for verification; and • Much more. This class includes several examples and practice exercises to help students apply the various calculation options.

Adjusted Income – Deductions & Verification of Deductions
 	
Instructor: Mary Ross
 	
Recorded Time: 2 Hours
 	
Viewing Period 5 Days
	4	This RBD OnDemand Training has been designed to introduce new property managers to the HUD Adjusted Income calculation. This class explains the five HUD deductions outlined in HH 4350.3 Paragraph 5-10 and how those deductions are applied to calculate Adjusted Income. Students will learn about:
		• Deductions available to all families.
		   o Dependent Deduction
		   o Child Care Deduction
		   o Disability Assistance Expense Deduction
		• Deductions available to senior/disabled families.
		   o Elderly/Disabled Family Deduction
		   o Medical Expense Deduction
		
		Students will also learn about the verification requirements for each type of deduction. Class includes information about how to enter information on the 50059 to ensure that the deductions are considered without TRACS errors.
		
		This class includes several examples and practice exercises to help students apply the various calculation options.

Assets & Income From Assets - Basics Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days	5	This class provides information about how to treat common assets owned by residents of HUD Multifamily Housing properties. This includes bank accounts, peer-to-peer payment accounts, debit cards, lump sums, etc. This class also explains how to treat assets owned jointly, how to treat disposed assets, how to determine the cash value of assets and how to derive income from assets. This class includes several examples and practice exercises to help students apply the various calculation options.
EIV Income Reports Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days	6	Please note that we have suggested that management office staff take this class immediately after training discussing calculation of income (income and income from assets). This RBD OnDemand Training provides a comprehensive explanation of: • When HUD wants owner/agents to review EIV Income Reports • Using EIV for Upfront Income Verification (UIV), and • Addressing EIV Income Discrepancies

		EIV Income Reports must be reviewed 1) 90 days after any new MI or IR adding a new member, 2)before creating an Interim Recertification and 3) before creating an Annual Certification. These reports must be included in the tenant file. This includes documenting the file to explain how EIV Income Discrepancies are addressed. Practice exercises are included.
Streamlined Verification & Implementation of the FAST Act Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days	7	This class is only necessary if the owner/agent has adopted Streamlined Verification & Streamlined Certification. This allows owner/agents to: • Verify fixed income amounts every three years instead of every year • Verify family assets every three years instead of every year when total value of assets is $5000 or less; and • Complete full verification of income for certain fixed income families every three years instead of every year Did you notice that HUD has made three major changes to the certification process specifically to make verification and certification easier? Join us to learn about the changes HUD started introducing in 2016. Do you have residents with fixed income (e.g., Veterans benefits, pensions, annuities, etc.)? You only need to verify the COLA or percentage increase for 2021 and you can calculate new income without getting new award letters. See HSG Notice 16-09 Streamlining Administrative Regulations for Multifamily Housing Programs. If you verified assets last year and the value of family assets totaled $5000 or less, you can accept witnessed or notarized self-certification this year and next year. You're done. You will not have to "go back" and get bank statements or other verification documents. See Streamlining Administrative Regulations for Multifamily Housing Programs and Implementing Family Income Reviews Under the Fixing America's Surface Transportation (FAST) Act. You can also Streamline Certifications for residents who receive little or no income other than fixed income (Social Security, VA, annuities). Practice exercises are included.
Assets & Income from Assets - Investments Instructor: Mary Ross Recorded Time: 4 Hours (Two Sessions) Viewing Period 10 Days	8	This class provides information about how to treat investment assets owned by residents of HUD Multifamily Housing properties. The assets discussed in this class tend to be high value assets such as mortgages/deeds of trust, annuities, IRAs, investment portfolios, trusts and ABLE accounts. This class provides options for projecting income from assets when income is based on stock market performance. This class also explains how to treat assets owned jointly, how to treat disposed

		assets and how to determine the cash value of these types of assets. If none of the residents own investment accounts, this class can be moved down on the viewing order. We provide a comprehensive explanation of how to treat assets, how to determine a "rate of return" when investment growth is based on stock market performance, and what owner/agents need to decide when establishing their own policies. This class includes several examples and practice exercises to help students apply the various calculation options. It takes a little over 3 hours to complete this class which has been divided in to two sessions. This class includes several examples and practice exercises to help students apply the various calculation options. It is strongly recommended that learners complete the RBD OnDemand Training – Assets & Income from Assets – Basics before taking this class.
HUD's Annual Recertification Process Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days	9	Annual Recertification is a multi-step process with several required elements including resident notification, recalculation of income and HUD's assistance payment, provision of certain documents and collection of signatures. Discussion of the use of the Extenuating Circumstance Code, in place of resident signatures, is also included. We discuss residents who report in a timely manner, residents who report late but before the AR anniversary date, residents who are terminated because they reported on or after the AR anniversary date, and sending the AR using an Extenuating Circumstance Code instead of a tenant signature. This class explains the process and provides suggestions to improve resident response. Practice exercises are included.
HUD's Interim Recertification Process - Changes to Income Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days	10	Interim Recertification can be a complicated process. Specific challenges include verification of new employment and addressing frequent changes to employment (gotta job – quitta job). This class provides a detailed explanation of both the resident requirements and the owner/agents responsibilities when a resident reports an income change. We explain what to do when a resident gets a new job, your options when your residents report a reduction to income, what to do when deductions change, what to do when income is irregular and how to handle certification when a resident works part of the year (i.e., teachers, construction workers, etc.). Practice exercises are included.

HUD's Interim Recertification Process - Household Composition Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days	11	Interim Recertification can be a complicated process. This class provides in-depth information about how to create an Interim Recertification when a family reports a change to household composition. Property managers should understand their responsibilities when a resident reports a change to household composition. This includes when a resident requests to add a new member or reports the departure of a resident. We will review adding and removing an adult family member, adding a child with no Social Security Number and later adding the Social Security Number, and we will discuss the addition of a live-in aide. We will also discuss HUD's requirements when a resident fails to report a change. Practice exercises are included.
EIV Existing Tenant Search & the EIV Master File Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days	12	MOR findings related to the maintenance and use of EIV Master Files are the number one most common findings. The EIV Existing Tenant Search must be reviewed before ANY household member is allowed to move in to a unit. This class discusses the information provided on this report and how property managers should handle applicants who are currently receiving assistance. This class also provides detailed information about the EIV Master File reports including how frequently each report should be reviewed, how long to retain these reports and recordkeeping requirements including how to set up electronic EIV Master Files. Practice exercises are included.
Responsibilities of the Section 504 Coordinator Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days	13	This class is specifically designed to provide information about the responsibilities of anyone assigned to act as the Section 504 Coordinator. We feel that all staff should understand these responsibilities but, at minimum, the Section 504 Coordinator must be aware of the regulatory requirements. Interactive exercises are included.
Advanced Reasonable Accommodation & Modification Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days	14	The most frequent fair housing complaints stem from real or perceived discrimination based on the presence of a disability. The Fair Housing Act and Section 504 of the Rehabilitation Act provide protections for applicants and residents with disabilities. This OnDemand Training includes a brief overview of Fair Housing/Section 504 protections offered to people with disabilities. Then, we will discuss the most challenging RAM requests. Requests we will be discussing include rule changes, unit modifications, hoarding, assigned parking, assistance animals, and caregivers/live-in aides. Interactive exercises are included.
Violence Against Women Act	15	In 2008, protections included in the Violence Against Women Act were extended to Section 8 residents receiving HUD housing

Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days		assistance. In 2017, those protections were extended to all HUD program recipients and also residents living in properties with Rural Development contracts and Low-income Housing Credits contracts. This class explains the rules for HUD's Multifamily Housing programs. This RBD OnDemand Training provides a comprehensive explanation about housing providers' requirement to provide protections provided under The Violence Against Women Reauthorization Act of 2013. Learn how to develop a compliant VAWA Policy, what must be included in your VAWA Emergency Transfer Plan and when and why you distribute forms. Interactive exercises are included.
Assistance Animals Instructor: Mary Ross Recorded Time: 2 Hours Viewing Period 5 Days	16	In 2020, HUD provided new, comprehensive guidance explaining owner/agents requirements, under fair housing law, when an applicant or resident requests an assistance animal. This class explains those requirements in detail and also includes a discussion of Section 504 requirements related to requests for assistance animals. Discussion includes how to use Dangerous Dog Registries, review of new laws punishing false requests for an assistance animal, internet verification and design of Assistance Animal Rules. his RBD OnDemand Training explains the requirements provided in FHEO Notice 2020-01 Assessing a Person's Request to Have an Animal as a Reasonable Accommodation Under the Fair Housing Act and in the HUD/DOJ Joint Statement Regarding Reasonable Accommodations. Students will also learn the best ways to establish policies for pets and assistance animals including HUD's guidance, new state laws penalizing residents making false claims for the need for an assistance animal, and how to use state dangerous dog registries. We will also discuss verification including internet verification of the need for an assistance animal. Interactive exercises are included.

EIV Preparing for the Management & Occupancy Review
 	
Instructor: Mary Ross
 	
Recorded Time: 4 Hours (Two Sessions)
 	
Viewing Period 5 Days
	17	This class provides a comprehensive explanation of:
		    - The EIV Questions asked during the Management & Occupancy Review
		    - The EIV employee forms provided to Reviewers
		    - The requirements for use of each EIV report
		    - A comprehensive explanation of how to address an EIV Income Discrepancy including:
		        - How to document the tenant file
		        - How to determine Repayment Agreement amounts
		        - How to show Repayment Agreements on the voucher

		This class does not include an explanation of each EIV Report but rather explains how to demonstrate compliance with EIV reporting requirements and how to address common, complicated EIV issues. Practice exercises are included.

Please be sure to read the RBD OnDemand instructions that are included in the email confirmation before accessing the class and class materials.

To ensure that students comprehend the information provided in each class, class completion certificates are provided after the student has completed and passed a Knowledge Assessment for the topic. You must score a 75% or above and it is an **open book test**. Completed Knowledge Assessments should be sent to jennifer.zieminick@rbdnow.com.

The class Registration fee covers one student. Knowledge Assessments and class completion certificates are provided for students who have registered and paid for each RBD OnDemand Training class.

For inquiries about registration for groups or teams for any RBD OnDemand Training, please contact Jennifer Zieminick by email at jennifer.zieminick@rbdnow.com or by phone 770-424-1806 (Tuesday through Thursday 10:00 AM to 3:00 PM EST).