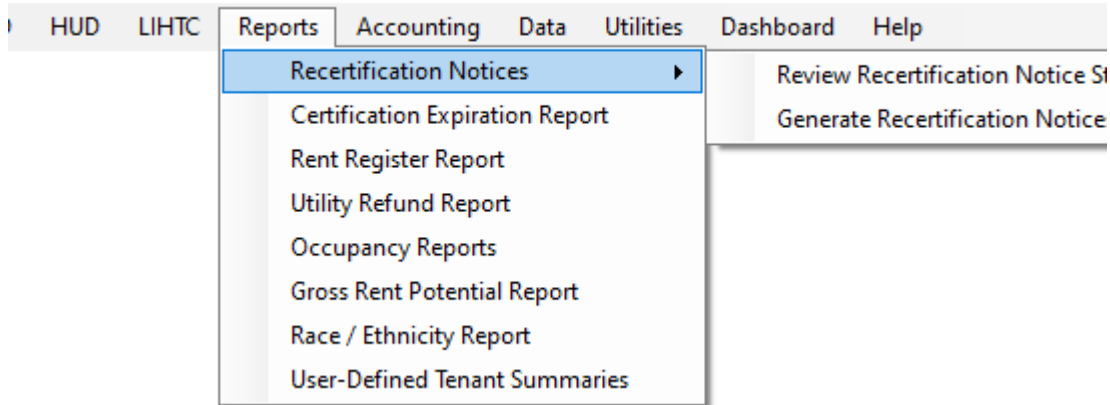


# RECERTIFICATION PROCESS

## RECERTIFICATION NOTICES TO TENANTS (120 DAYS BEFORE EFFECTIVE DATE)

1. The 1<sup>st</sup> of every month: In FHA – go to Reports → Recertification Notices → Generate Recertification Notices

Software for Windows [ Rel. 2023.12.31 ] User: JESSICA THOMPSON ...



2. Choose the correct Month (4 months out). Under “Notice Selection” Choose Annual Letter without Verification Letters and Print to the Printer.

A screenshot of the 'Recertification Notice Processing' dialog box. The 'Setup' section includes a description: 'This feature automatically generates all your recertification related notices, letters, worksheets, and verification forms, based on selection criteria defined below.' It has radio buttons for 'By Project Filename' (selected, with 'MUA' in the dropdown) and 'Multi-Property Reports' (with 'All Projects' in the dropdown). The 'Recertification Date' is set to 'May 2024'. There are checkboxes for 'Anniversary Date of Move-In' and 'LIHTC Placed in Service ( PIS ) Date'. A note says '( Unless checked above, Next Recertification Date will be used )'. There is also a checkbox for 'Exclude Market Renter ( MKT ) Tenants / Units'. The 'Form Type to Generate' section has radio buttons for 'Custom Designer Reports ( .RPT )' (selected) and 'Custom MSWord Documents ( .DOC )'. The 'Notice Selection' section has radio buttons for 'Annual Letter with Verification Forms' and 'Annual Letter without Verification Forms' (selected). It also has radio buttons for '90-Day Reminder Letter', '60-Day Reminder Letter', and '30-Day Reminder Letter'. There are checkboxes for 'Include a Tenant Summary' (checked), 'Print Tenant Summary Only', 'Generate verification forms for one Tenant Certification only ...', 'Select Specific Tenants', and 'Reprint Selected Letters'. There are dropdowns for 'Unit No.' (00 101) and 'Effective Date' (07/01/2024). The 'Output' section has radio buttons for 'Monitor' (selected) and 'Printer'. There are 'Help', 'OK', and 'Cancel' buttons at the bottom.

3. Make a copy of each Tenant Annual Letter. Give the tenant a copy of the letter and put the other copy in a file to process.
4. Instruct individuals to bring the following to the interview and make copies of them:
  - a. Social Security letters
  - b. Pay Stubs (last two)
  - c. Current Checking account statements
  - d. Life insurance
  - e. Medical expenses, etc.
  - f. Updated Pet verifications

## **INTERVIEW AND VERIFICATIONS (90 DAYS BEFORE EFFECTIVE DATE)**

1. Schedule an interview with the individual to complete the full recertification.
2. Download the Recertification Packet (HRDE website) and complete it with signatures.
3. Send out any remaining verifications needed. Date stamp all documentation when received.
4. Once all verifications are received:
  - a. Complete the Certification Worksheet (HRDE website).
  - b. Complete the 50059 (FHA) *See attached FHA step-by-step instructions.*
    - i. Choose Recertify → Annual Recertification.
    - ii. Make sure dates are accurate: Effective Date is the month of when they moved in. Next Recertification Date is the following year. Anticipated Voucher Date is at least two months out.
    - iii. Enter income, assets, medical into 50059.
    - iv. Print 50059 and Tenant Income Detail.

Notes: The Recertify Button is used ONLY when initially starting the recertification process. To make changes BEFORE the recertification is activated, you must use the REVISE button.

## **PROOFING A RECERTIFICATION (60 DAYS BEFORE EFFECTIVE DATE)**

1. The Checklist for Proofing a Move In (HRDE website) is in the Recertification Packet.
2. Put all documents in order on the checklist, scan and email to your bookkeeper.
3. The bookkeeper will proof and make sure all items match and numbers are correct and send you an email with their response.
  - a. If the bookkeeper confirms that your work is correct, then schedule an appointment to sign the documents with the tenant.
  - b. If the bookkeeper has issues, then corrections need to be made before scheduling a signing date.
4. Go back to the HUD 50059 (FHA) and print the Initial H and Lease Amendment H.

## **ACTIVATING A RECERTIFICATION (30 DAYS BEFORE EFFECTIVE DATE)**

1. Activate the Recertification (FHA). Dates/Signature must match for Tenant and Manager.
2. Perform Annual inspection and have tenant sign.
3. Put work order into FHA for mandatory cleaning/repairs.

## **NOTICE OF RENT CHANGE (30 DAYS BEFORE EFFECTIVE DATE)**

1. Tenants MUST receive a copy of the Initial H and Lease Amendment H with their new rent amount at least 30 days prior to the new rate becoming effective. FHA will automatically make the rent change based on the effective date.