2019 WEBINAR TRAINING
Class Descriptions and Dates

Please note: Registration closes five (5) business days prior to each class date, at 5 pm Eastern Time.
For late registration, call (315) 679-5611.

NEW MANAGER SERIES:

New Manager - Tenant Interviews
Prerequisite Skill Set: Basic understanding of HUD program eligibility requirements and recertification procedures.

The tenant interview is the prime opportunity to discuss financial circumstances with a subsidized household. Important discussions during the interview can save managers’ time and frustration down the road. This introductory webinar is geared towards new staff that interview tenants at move-in and during recertifications. How thorough is your tenant interview process? Are your application and recertification questionnaires compliant with Change 4 or are these documents stale? Are you asking all the right questions during the interview versus seeking clarification from the tenant days later?

In this class, you will learn how to fine tune your interviewing skills and support your final income determinations during an efficient interview. Discover the most common interviewing mistakes and “shortcut pitfalls” and how to avoid them. Become a “pro interviewer” and master the art and skill of working smarter, not harder.

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone
• TBA

New Manager - Calculating Annual Income for 50059s
Prerequisite Skill Set: None.

Consistently and accurately projecting annual income on a 50059 is a proficiency that continuously needs to be refined by experience. Ironically, it is also one of the first skills new managers are expected to develop. This class is geared towards new staff that interview tenants and perform income calculations for HUD 50059s. Learn what types of income count and do not count on the 50059. Practice with fundamental calculation methodologies. Using case studies, we will explore when you can utilize EIV Income Reports as the sole source of income verification and when other methods of verification are required. This webinar is absolutely necessary for housing professionals establishing the skill set for accurate income eligibility determination and 50059 calculations.

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone
• TBA
New Manager – Determining Cash Value of Assets
Prerequisite Skill Set: None.

Understanding assets can be tricky. Before you can calculate asset income, you must 1) correctly identify all assets for the household and 2) establish their cash value.

This new manager-level class is designed for those staff that interview tenants during the certification and recertification processes. Do you know what counts as an asset and what doesn’t? How often must assets be verified? What is the difference between cash value and market value? How do you estimate the value of real estate or insurance policies? During this interactive webinar, we will use real-life examples to illustrate different types of assets and their correct valuation. Learn new interviewing techniques that will help ensure all assets are being identified during the interview prior to move-in or annual recertification.

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone
  • TBA

New Manager - Expenses and Deductions
Prerequisite Skill Set: None.

This is a great class for those new to the industry or those that would like a refresher course on how to accurately calculate expenses and deductions on the 50059s. Participants will learn about the different categories of deductions; which households are eligible for which deductions; and, of course, how to calculate them. We’ll cover inclusions and exclusions, and what types of verifications are required to support medical expenses. Learn when a wheelchair is a disability deduction and when it’s a medical deduction. Test your understanding of the regulations via our real life scenarios during this eye-opening class.

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone
  • TBA

**INTERMEDIATE SERIES:**

Intermediate – Verification Techniques
Prerequisite Skill Set: Basic understanding of HUD program eligibility requirements and recertification procedures.

Verification methods were reconstructed in November 2013. Did you identify these crucial, time-saving improvements? This class is geared towards leasing staff that verify income, assets, and expenses prior to move in and during recertifications. Are you asking all the right questions? Have you incorporated the new Change 4 verification methodology into your recertifications? Are you frustrated by repeated patterns of EIV income discrepancies, year after year, but don’t know the cause?

What do you do when third party income verifications do not provide an accurate estimate of anticipated income? How do you handle those recertification “curve balls”? In this energizing new webinar, you will learn new, easy to use techniques to improve the accuracy of verifications to support accurate 50059 calculations. Using real-world circumstances, the instructor will help you identify the most common verification mistakes and how to avoid them.

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone
  • TBA
**Intermediate – Income Calculation Scenarios**  
Prerequisite Skill Set: Completion of New Manager – Calculating Annual Income for 50059s webinar.

Mastering accurate income calculations is a crucial skill set for all housing professionals. This intermediate level class will present new calculation challenges to those that have mastered the basic annual income calculation methodologies. Via real life case studies, we will explore more complicated scenarios involving student income, fluctuating income, seasonal employment and self-employed tenants. We will explore when an asset converts to an income source. The group will discuss scenarios wherein third party verification forms are either completed incorrectly, or don’t tell pertinent parts of the story that affect income calculations. Don’t miss this exciting and informative webinar; it is an essential building block for minimizing EIV income discrepancies in the future!

**Upcoming Classes** - All Classes are Eastern Time - Check Your Time Zone  
- TBA

**Intermediate - Asset Income**  
Prerequisite Skill Set: Completion of New Manager – Determining the Cash Value of Assets webinar.

Asset income is calculated two ways: By computing the actual income earned and via imputed income calculations. Do you know the difference between the two and when to use which method? Are you comfortable imputing assets over $5,000 using HUD’s new passbook rate effective February 1, 2015? How do you calculate the income of assets when their value continuously fluctuates? At what point does an asset become an income source instead? During this webinar, the instructor will use real-life examples to illustrate critical concepts that guide accurate calculations and reporting on the 50059.

**Upcoming Classes** - All Classes are Eastern Time - Check Your Time Zone  
- Class #06-06-19P: June 6, 2019 (1:00 pm – 2:30 pm Eastern Time)

**Intermediate – Expense and Deduction Scenarios**  
Prerequisite Skill Set: Completion of New Manager - Expenses and Deductions webinar.

This intermediate level webinar will focus on more complex scenarios that test your understanding of the HUD regulations guiding expenses and their resulting deductions on 50059s for eligible households. How do you accurately calculate medical expenses when similar expenses were reported the prior year? What are the allowable methods for projecting medical expenses? What types of clarification questions should you ask applicants and tenants during the certification interview to accurately calculate child care expenses during the school year versus summer break? What do you do when a tenant brings you a pile of receipts for over-the-counter purchases?

This webinar is filled with scenarios that keep you engaged and provides techniques to ensure accurate calculations supported by documentation in the tenant file.

**Upcoming Classes** - All Classes are Eastern Time - Check Your Time Zone  
- TBA
**EIV SERIES:**

**EIV Master Reports and Existing Tenant Search**  
Prerequisite Skill Set: Basic understanding of HUD program eligibility requirements and recertification procedures.

In this introductory EIV course, participants will be provided a concise overview of monthly and quarterly reports stored in the EIV Master File as well as the Existing Tenant Search. We will explore where to find them; when to print them; what the information means; how to use them and where to store them. Example screenshots will allow visual learners to follow along and engage in instructor-led discussions regarding the relevance of each report and the actions managers must take. Don’t miss this fundamental class on EIV; it is a critical building block for maintaining a compliant EIV Master File!

**Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone**
- TBA

**EIV Income Reports and Fundamentals of Discrepancies**  
Prerequisite Skill Set: Basic understanding of recertification procedures, and the categories and appropriate calculation of annual income.

To accurately interpret and resolve discrepancies, you must first understand the layout and content of the EIV Income Report. This intermediate level webinar will teach participants what types of income EIV recognizes, when such income “hits” the report and at what frequencies. Next, the group will explore the fundamentals of income discrepancies. Do you understand what prompts a discrepancy? Do you know how to calculate income earned during the Period of Income (POI) to reconcile income on a Discrepancy Report with income on the Income Report?

To master this skill, participants will learn how to read and dissect an Income Discrepancy Report and apply an effective methodology to identify and calculate income earned during the Period of Income via realistic case studies. This class is an absolute must-have for those establishing an EIV discrepancy resolution procedure for their property.

**Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone**
- TBA

**Practice Resolving EIV Discrepancies**  
Prerequisite Skill Set: Completion of EIV Income Reports and Fundamentals of Discrepancies webinar.

Are you frustrated with resolving EIV Discrepancies? Do you feel it’s a waste of time? Do you understand how to read the EIV Income Report, analyze and interpret the EIV Discrepancy Report and calculate the income during the applicable Period of Income; but...you struggle with determining if the discrepancy is valid or not and how to document resolution in the tenant file? This intermediate level class is designed for you! During this interactive webinar, participants will work with real-life case studies and learn how to utilize PMCS-created resolution forms to document resolution steps easily and with clarity. Turn your frustration and struggles into a game you can win and feel satisfied with a job well done! This a webinar training you do not want to miss!

**Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone**
- TBA
FOCUSED TOPICS:

**Affirmative Fair Housing Marketing Plans**

Prerequisite Skill Set: Basic understanding of Fair Housing Regulations and HUD Handbook 4350.3, REV-1, Change 4 - Chapter 4 - Marketing Requirements.

This interactive webinar is designed for owners, agents, property managers and site staff needing to update their existing Affirmative Fair Housing Marketing Plan (AFHMP). AFHMPs must be reviewed and updated, if necessary, every 5 years. In 2011, the AFHMP Form 935.2A was revised and significantly expanded. Owners or agents are now required to report demographic information from their property’s existing tenant population, the property’s waiting list and surrounding market area (via census information). Learn how to gather this online census information to complete the Form 935-2A. Get tips on best practices and ways to ensure your revised AFHMP is a complete submission while learning inexpensive, yet effective, advertising and marketing techniques to attract applicants to your property.

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone

- TBA

**Fair Housing and Section 504 Requirements**

Prerequisite Skill Set: None.

Attend this PMCS webinar and gain insight into the major Fair Housing laws, the Fair Housing Act (Title VIII of the Civil Rights Act of 1968), Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act (ADA). Understand who is protected under federal law, how state and local laws can impact this, and exemptions from the Fair Housing Act. Whether you are in management, day-to-day leasing or maintenance of rental housing, this course is for you!

In this webinar, we will provide a history and summary of key civil rights laws and a review of past and current housing discrimination complaints to set the stage for how to ensure your property is Fair Housing complaint. Additionally, we will walk through why you need to review your policies, practices and procedures routinely, how to handle reasonable accommodation/modification requests, and other best practices to implement to stay compliant with Fair Housing laws and avoid costly lawsuits.

Housing discrimination claims and violations can result from just one wrong answer or response to a tenant or applicant. Do not put your property or management company in harm’s way, attend our informative overview to stay current on Fair Housing rules.

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone

- TBA
PMCS 2019 WEBINAR SERIES

MOR Part I - Understanding the Mechanics of a HUD MOR
Prerequisite Skill Set: None.

This webinar is perfect for new managers who have never undergone an MOR and also for seasoned managers that want an update and overview of how the MOR process has changed since 2012. Because the majority of HUD’s multifamily properties have not undergone an MOR in nearly five years, the May 2016 nationwide reinstatement of PBCA-conducted MORs has many asking: What exactly happens during an MOR? How is the MOR Rating determined? How often will MORs occur?

In Part I of this two-part series, participants will learn about each of the four stages of the MOR, new elements of the HUD Form 9834, the rating methodology, and HUD’s risk-based approach to scheduling MORs.

Once participants complete Part I, they are encouraged to register for MORs Part II, which focuses on specific leasing and occupancy assessments that must be accurate and complete to be compliant and ready. Think you don’t have time for this webinar training on MORs? Can you afford not to? Investment for training now will yield a significant amount of time and monetary savings for you and your property in post-MOR remedies.

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone
• Class #07-16-19A: July 16, 2019 (11:00 am – 1:00 pm Eastern Time)

MOR Part II - Assess Your Forms & Policies for Compliance
Prerequisite Skill Set: An overview of HUD Handbook 4350.3 REV-1 Change 4 regulations and TRACS 202D Specifications.

The May 2016 reinstatement of MORs for PBCA-administered HAP contracts has many Owners, Agents, Property Managers and Site Staff anxious about leasing and occupancy compliance. This is the second of a three-part webinar series designed to assist compliance staff and managers with their property’s Management and Occupancy Review (MOR). In the world of HUD compliance, it is not enough to just “be aware of the new rules”; you must incorporate new requirements into forms, policies and procedures. This webinar will guide participants through a series of detailed leasing and occupancy assessments to assess compliance and help staff develop a plan to tackle required leasing updates and avoid potential areas on non-compliance. Participation in this class is a crucial step in achieving a favorable leasing and occupancy rating on your next MOR!

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone
• Class #07-25-19P: July 25, 2019 (1:00 pm – 3:00 pm Eastern Time)

MOR Part III - Responding to and Closing Out MORs
Prerequisite Skill Set:

MORs have been occurring for the last few years and Owners, Agents, Property Managers and Site Staff may find themselves struggling with responding and closing out past or current MOR findings. In the third session of a three-part webinar series designed to assist compliance staff and managers with understanding the Management and Occupancy Review (MOR), this webinar will guide participants through responding and closing out an MOR, with a look at common findings and example corrective actions that could be taken in several example scenarios. Participation in this class will provide the information needed to close out an MOR and successfully put in place controls and practices to prepare for better audits.

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone
• Class #07-31-19A: July 31, 2019 (11:00 am – 1:00 pm Eastern Time)
TRACS 203A
Prerequisite Skill Set: None.

HUD is implementing a new TRACS software, version TRACS 203A, with a 5 month implementation schedule, which is scheduled to roll out February 1, 2019. Are you ready? Attend this PMCS webinar and gain insight into the upcoming TRACS 203A changes. This is a must attend webinar for ALL site personnel who do tenant recerts and/or anyone who creates, reviews or sends the voucher MAT files to TRACS.

There are other changes in this release; but the major change is to the Repayment Schedule, Part 6 of the voucher. If you have any open, unpaid repayment agreements (for current or moved out tenants who are still making payments) a new baseline file of your repayment agreements must be created and transmitted to your TCA/PBCA/HUD, where applicable before you transmit your first voucher in the new TRACS 203A format.

There is a 5-month transition period for Owner/Agents to convert their compliance software from TRACS 202D to 203A – February 1, 2019 thru June 30, 2019. All MAT file transmissions must be in the new 203A format by June 30, 2019.

This class includes a review of the new Race and Ethnicity categories/sub-codes and a major revision to Part 6 (MAT30 Section 7) of the Voucher which is being renamed ‘Repayments and Escrows’ Several fields are being added to this section of the voucher to better report and track these transactions by your CA, HUD and the OIG. Be ready for this big change – current specs require the entire voucher to be rejected when there are repayment agreement errors. Contract Administrators are not allowed to make the changes/corrections to the data submitted on the voucher!

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone
• TBA

TRACS Fundamentals
Prerequisite Skill Set: None.

Back by popular demand – PMCS training on HUD’s TRACS System. This class is a must for everyone...New Managers, Seasoned Managers, All Staff who deal with TRACS, as well as Owners and Agents. Your Contract Administrator is not the only one responsible for your certs in the TRACS System – this is a shared responsibility. You won’t want to miss this ‘nuts-and-bolts approach’ to understanding HUD’s TRACS system, including the TRACS cert and voucher messages, the NEW TRACS User Recertification requirement; and we will discuss the TRACS Rules of Behavior and Cyber Awareness Challenge requirements too.

At a January 2019 conference of industry stakeholders, there was a strong indication that the TRACS 203A compliance software upgrade will happen within the next few months. HUD has newly announced a goal to implement TRACS 203A with a 2-month transition period (as opposed to a 4-month transition) at some point this year; while no live date has been given, we encourage Owners and Agents to prepare accordingly to ensure a seamless transition.

This is a perfect time to take this webinar and establish the fundamental knowledge needed at your property or Management Company before TRACS 203A and 203B are released—to comply with HOTMA – the Housing Opportunity Through Modernization Act, and the FAST Act – Fixing America’s Surface Transportation Act since they affect the tenant (re)certification process, tenant selection procedures and compliance software changes.

Take advantage of this opportunity to get the TRACS training you need, no matter how long you have been in the industry and how familiar you think you are with how TRACS works! Sign up today!

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone
• Class #06-20-19A: June 20, 2019  (11:00 am – 12:30 pm Eastern Time)
TRACS: Voucher and Cert Queries for the MOR and EIV Discrepancies

Prerequisite Skill Set: None.

Do you run and review the TRACS queries/reports for your property? Or do you solely rely on your Contract Administrator (CA) for what you need to know about your certs and vouchers? This PMCS webinar contains more information every affordable housing manager, recert clerk or management personnel must know when dealing with TRACS. Learn which queries/reports are used to help prepare for your Management and Occupancy Review (MOR) and which query should be checked before starting an EIV discrepancy resolution.

Remember, monitoring TRACS is a shared responsibility with your CA. This class will review and explain each of the Voucher and Cert Queries/Reports in HUD’s TRACS system. Learn how you can use these reports to better prepare for your Management and Occupancy Review (MOR) and how they are used by your Contract Administrator and/or HUD before their MOR site visit.

We will also take a closer look at how the TRACS system works in conjunction with HUD’s EIV system, and which query will be a big help when you are trying to resolve an EIV discrepancy.

This is a perfect time for everyone to take this 2nd class in our TRACS webinar series to expand and/or confirm your TRACS knowledge before HUD implements more industry changes. Get the TRACS training you need, no matter how long you have been in the industry and how familiar you think you are with TRACS. Sign up today!

Upcoming Classes - All Classes are Eastern Time - Check Your Time Zone

- Class #07-10-19P: July 10, 2019 (1:00 pm – 2:30 pm Eastern Time)