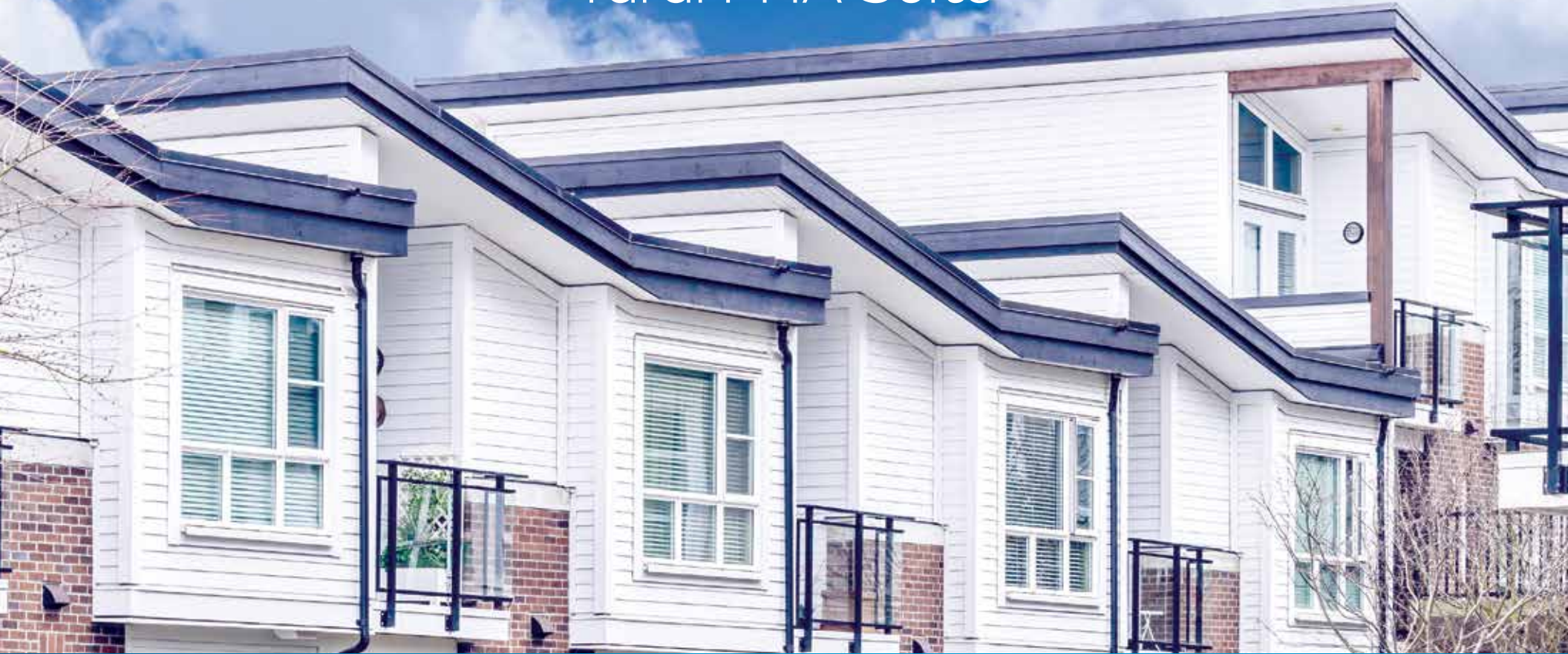


# Yardi PHA Suite



Simplify with a single connected solution supporting every PHA function. Gain total oversight and streamline management of PHAs, Housing Choice Vouchers, finance and compliance.



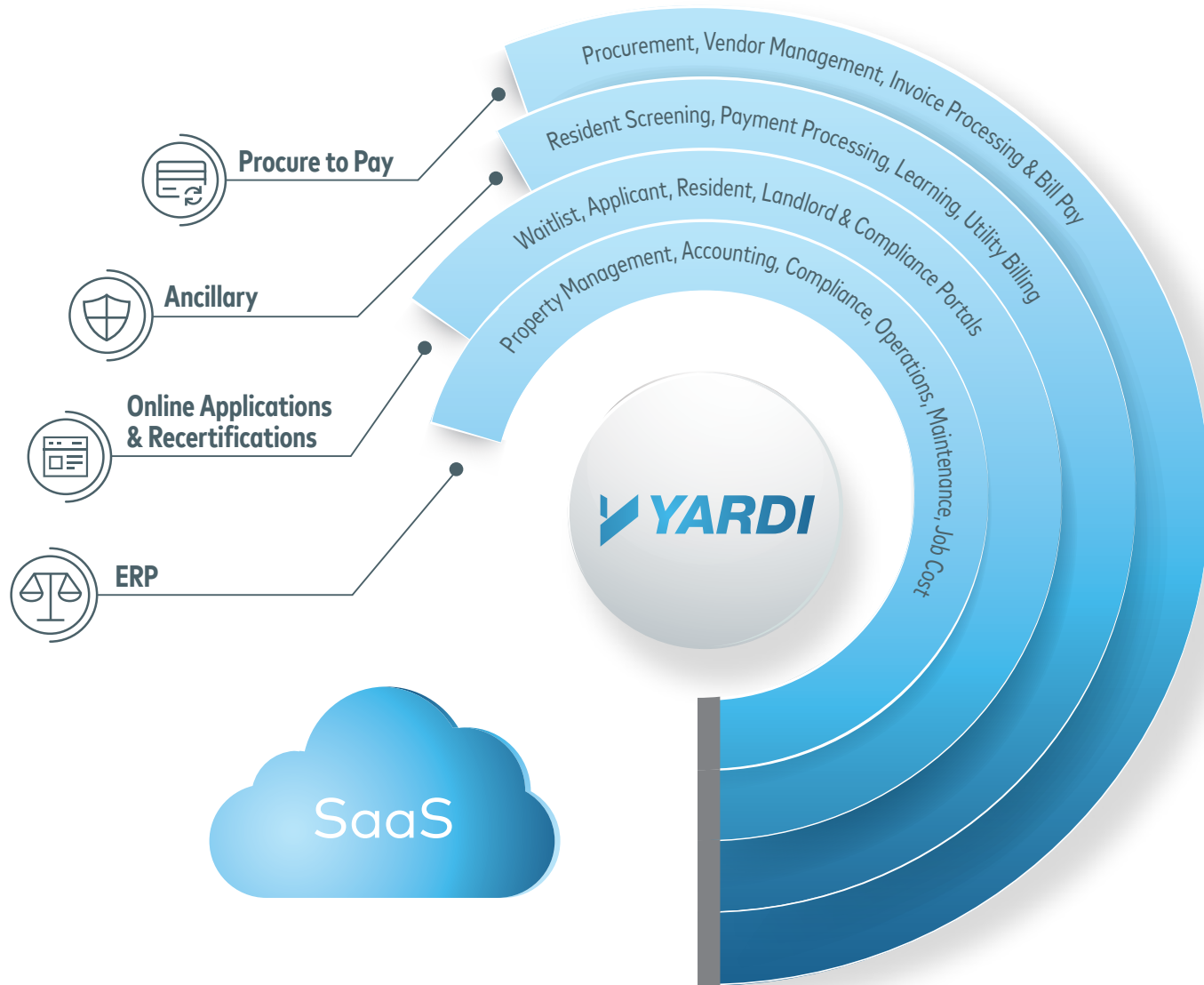
# Power Your Organization With a Single Connected Solution

- Consolidate operations on one platform to work smarter, maximize compliance, manage risk and gain efficiency
- Focus on what matters most with a system that provides an agency-wide view and a single version of the truth
- Untether your staff with mobile access to reporting, approvals and resident services from smartphones and tablets
- Keep your data safe and reduce IT costs with an award-winning cloud solutions provider
- Leverage the experience and applied knowledge of a PHA software industry leader

## Yardi PHA Suite

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# Yardi PHA Suite



## Key Benefits

- Serves as the only complete accounting, compliance and agency management solution supported by a single vendor
- Streamlines 50058 compliance for public housing and housing choice vouchers
- Features a single platform and database with full drilldown for true visibility
- Utilizes automated workflows modeled on industry-standard best practices
- Includes hundreds of standard reports and custom analytics with drilldown to transaction-level data
- Offers a suite of built-in smart additions for the flexibility to create a full business solution
- Leverages Software as a Service (SaaS) deployment and benefits
- Delivers real-time access through all major web browsers to execute leasing and provide resident services from smartphones and tablets





# Property Management

Leverage the most advanced SaaS property management platform for agencies with built-in accounting, compliance, real-time performance analytics and complete mobility for PHAs, housing choice vouchers and affordable housing.

# Yardi Voyager PHA

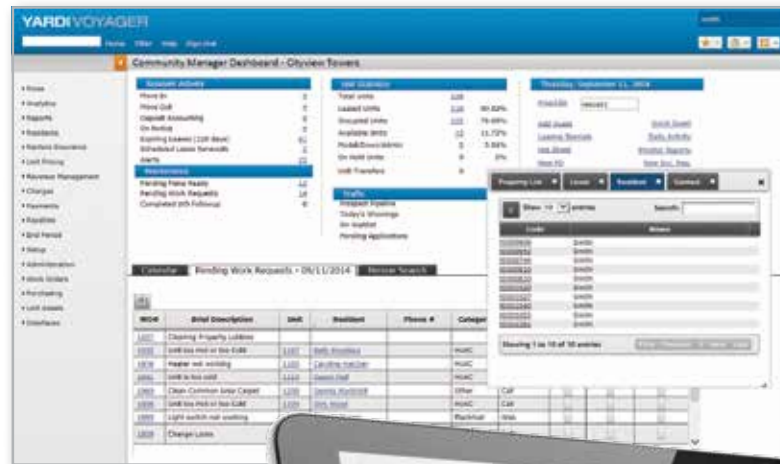
Yardi Voyager is an end-to-end platform combining compliance, financial and property management information in a single, centralized database — with mobile access to provide resident services, view dashboards and complete tasks from smartphones and tablets. Add products from the Yardi PHA Suite and take advantage of our comprehensive front office and back office tools and services. Streamline workflows and boost compliance for public housing, housing choice vouchers and affordable housing.

## Efficient Management

Streamlined workflows help manage check writing, approve work orders, process purchase orders and set up new leases, move-ins and move-outs, and more. Voyager performance tables allow you to configure stored procedures to meet your individual property management requirements.

## Smart Software

Voyager has smart navigation tools including a menu search box to find functions and a site search box to find account information quickly and easily. Make a favorites list of the screens you use most or use the history function to see where you've been. If you're a keyboard power user, you can set up shortcuts to your favorite screens. With Voyager, you can work on a desktop computer, laptop computer, Microsoft® Surface™, Apple® iPad®, Android™ tablet and all major smartphones. And because it's browser independent, you can choose the browser that works for you.



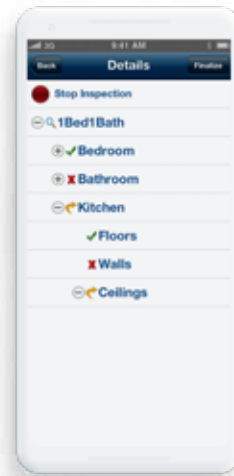
Search for residents using a pop-up window — and stay on the screen you're viewing. Search functionality works for all browsers and includes smart data entry and quick access to your favorites and search history.



Voyager provides standard performance tables that warehouse your data. You can populate these tables with stored procedures that can be run on a predetermined schedule. Analytic views include optional graphs.

## Mobile Solutions

Provide resident services and complete tasks and approvals right from your mobile device. License our suite of products for access to mobile apps including RENTCafé PHA, Yardi PayScan Mobile, Yardi Maintenance Mobile, Yardi Maintenance Manager Mobile, Yardi Inspection Mobile and more. Yardi mobile solutions are optimized for iPhone® and iPad®, BlackBerry® smartphones and Android™ smartphones and tablets.



Schedule and complete inspections from a smartphone or tablet. Assigned inspections appear instantly on the inspector's device.



Extend the Voyager property management and accounting platform with integrated value-add products from the Yardi PHA Suite. The suite features comprehensive solutions for online applications and recertifications, screening, procurement, invoicing, payment processing, maintenance management, energy management and more.

## Key Features

- Compatible with all web browsers and mobile devices
- Streamlined leasing workflow
- Configurable role-based dashboards
- Easy to understand resident ledgers and HAP ledgers with drilldown to every transaction
- Integrated general ledger and automated move-in, move-out accounting
- Integrated maintenance and work order tracking
- Customizable notices and verification letters
- Analytic reporting with drilldown and custom report writing
- Smart data entry and quick access to regularly visited screens and history
- Correspondence management for resident communications
- Service contract feature lets you process purchase orders, change orders and payables for contracts
- Hosting options include Yardi SaaS and Yardi SaaS Select

# Housing Management

Yardi is committed to the design, development and support of real estate software solutions. With our long-term dedication to the public housing industry, Yardi has vast experience and expertise in building solutions for subsidized housing programs. Yardi Voyager PHA leverages this experience to benefit your organization's everyday work.

## Efficient Unit & Voucher Management

Simplify work orders, purchase orders and onsite inspections. Multiple types of waiting lists are available to help track data for HUD's income targeting requirements. Custom one-to-many tables are configurable to track details for your local subsidy compliance requirements.

## Integrated Case Management

Streamline case management by integrating service and resident records in a common database. Voyager PHA makes it easy to link activities such as employment training courses, counseling and other case management services with resident and property management data.

## Comprehensive Reporting

Gain unprecedented insight into your PHA with reporting tools and audit trails. Voyager PHA dashboards provide real-time analytics covering operations, finance and compliance. You can also report on data from products in the Yardi PHA Suite to monitor activities related to resident screening, energy management and more.



Gain quick access to case management, agency management and reporting tools via intuitive dashboards.



## Resident & Landlord Management

Mitigate risk and improve reporting with a full audit trail of resident and landlord interactions. From initial contact through move-out, the Voyager PHA platform documents every major PHA activity. Improve the experience of your applicants, residents and landlords. Yardi PHA Call Center staff can quickly and accurately respond to inquiries based on real-time information from your Voyager database.

## Key Features

- Tracking for Request for Tenancy Approval (RFTA) processes and forms
- Daily activity reports and staff calendars
- Documents, images, voice memos and videos that can be uploaded in multiple file types
- Comprehensive documentation of resident correspondence

## Key Features

- Configurable waiting lists with income targeting categories, ranking processes, point systems and lottery systems
- In-depth waiting list history records for every applicant
- Editable contact letters for applicant data verification process management
- Automated merging of client information and verification data to produce forms, letters and mailing labels

# Waiting List Management

Voyager PHA provides configurable intake processes to ensure that your staff records all applicant information in the core database. The solution supports multiple types of waiting lists and the ability to place applicants on each concurrently. Voyager tracks all necessary data and produces all associated reports for complete compliance with HUD's income targeting requirements.



Waiting list sort order can be configured based on customizable preferences and targeting criteria. Applicants can apply for multiple waiting lists without duplicate data entry. Statistical reports can be run and waiting lists archived.

# Maintenance & Work Orders

Yardi Maintenance provides the tools you need to perform and track daily maintenance for all types of real estate including work order and purchase order processing, expense limits, warranty tracking and real-time reporting. Streamlined workflows with dashboards, calendars and alerts make maintenance processes more efficient and ensure exceptional service to your residents. With the optional Yardi Maintenance Mobile application, technicians can access, create and complete work orders from the field.

## Key Features

- Configurable, systematic processes for work orders from initial contact through completion
- Conveniently create payables for third-party vendors from information included on the work order
- Assign and schedule work orders efficiently via an intuitive dashboard
- Track work requests, alerts and exceptions with built-in analytic tools



Work order dispatch is a comprehensive report that shows all properties and a description of work to be done. Work order scheduler schedules work orders for service technicians.



# Compliance & Administrative Management

Agencies are challenged with significant compliance and administrative responsibilities. Voyager provides all of the tools you need to track required data for public housing, housing choice vouchers and the complete spectrum of federal, state and local subsidized housing sources.

## 50058 Compliance for Public Housing & Housing Choice Vouchers

Using the 50058 form and HUD guidelines, Voyager manages the workflows and provides the tracking mechanism and reports necessary to ensure you are running efficiently and maintaining compliance.

Voyager enables MTCS (Multifamily Tenant Characteristics System)/PIC transmission by using rules from the technical reference guide to perform extensive, automatic pre-submission error checking, greatly reducing 50058 PIC submission errors. If you receive the transmission results file from PIC and the results file includes errors, the Voyager MTCS file reconciliation process provides detailed information to resolve errors.

## Resident Service Programs

Voyager helps manage each phase of your resident services programs. Planned interview questionnaires can be used to determine needs and goals, create assessments, generate action plans and report progress on the 50058.

- FSS - Family Self Sufficiency
- WtW - Welfare-to-Work
- EID - Earned Income Disallowance
- Community Service

The screenshot displays the Voyager software interface. At the top, there are tabs for Unit, Asset, Income Voucher, Expense, Adjustments, and TTP. Below these are sub-tabs for Display Fields, Audit, Agency, Action, Member, and Background. The main area is divided into two sections: 'DISPLAY FIELDS ONLY' and 'Last Posted Fields'. The 'DISPLAY FIELDS ONLY' section contains a table with columns for field name and value:

Field Name	Value
9j TTP	208.00
12v Tenant Rent	18.00
12u Housing Assistance Payment	426.00
12j Voucher Payment Standard	955.00
12k Rent to Owner	444.00
12m Utility Allowance	190.00
12a Voucher Size	1
5d Unit Bedroom Size	9

The 'Last Posted Fields' section shows 'Date TR Last Posted'. Below this is a 'Family Info' section with a warning icon and the text 'Please check Alerts for details.' To the right of this are 'Functions', 'Data', and 'Reports' dropdown menus. The main content area is split into two panes: 'Review Family Records' and 'Resident Information'. The 'Review Family Records' pane shows a list of records with columns for record ID, date, and status. The 'Resident Information' pane shows a form with fields for Property, Unit, Tenant, HOH Name, HOH SSN, Address, City, Owner, Caseworker, and Program Settings. The 'Resident Information' pane also includes a 'Ctrl #2871' section with fields for 2a. Action Type, 2b. Date Effective, Correction, Date Modified, Date Lease Ends, Approve 50058, and Program Type. At the bottom right of the 'Resident Information' pane are buttons for Save, Delete, Help, Alerts (0/1), and Close.

The Family Information screen displays detailed information on the resident and provides drill down to the resident record.

# Administrative Management

Voyager helps manage other administrative functions conducive to public housing and housing choice vouchers.

## Unit Rent Reasonableness Comparisons

HUD requires PHAs to confirm that unit owners charge reasonable rents to housing choice voucher participants. Voyager performs rent-reasonableness comparison workflows to help your agency meet these requirements.

## Portability Tracking

Portability gives the voucher holder the ability to use voucher assistance outside the jurisdiction of the PHA that initially issued the voucher to the family. Voyager manages the workflow for the HUD 52665 Family Portability Information form.

## Abatements & Tenant Holds

At times, you may need to hold housing assistance payments for the resident. You can hold all payment types, or specify payments for housing assistance, utility reimbursements or FSS escrow credits. Screens can be customized in Voyager to help you manage these processes.

## Landlord Garnishments & Overpayments

Voyager provides the ability to garnish the landlord, whether for a portion of the HAP payment or the entire HAP payment. Other circumstances may have caused you to overpay the landlord. Processing landlord overpayments is easily managed in Voyager.

## Tenant Payment Agreements

Residents may owe money to your agency. A tenant payment agreement (TPA) enables the resident to pay a debt to the housing agency over a period of time. The TPA process in Voyager reverses actual aged charges and adds new charges according to the payment agreement terms. Multiple payment agreements are allowed for the same resident.

# Key Features

- PIC compliance data for all major programs including Public Housing, Housing Choice Vouchers, Mod Rehab and Homeownership
- HUD-compliant waiting list management
- HUD 50058 validation against the TRG (Technical Reference Guide)
- HUD 50058 financial transactions including rent charges, utility reimbursements and payables to the landlord
- Highly configurable Moving to Work parameters to fit local MTW initiatives
- HQS inspection records with configurable HUD Form 52580



# Financial Management

Yardi Voyager PHA is a complete accounting system designed to meet all applicable GAAP and IFRS requirements. The full-featured general ledger makes financial management processes efficient and responsive to unique organizational policies and procedures. With tools including multiple sets of books, general ledger allocation, recurring journal entries, segmented accounting, intercompany accounting, financial entity setup and account trees, Voyager has the accounting power to support your business.

## Accounts Receivable

Voyager provides comprehensive accounts receivable functionality including resident invoicing, automatic or manual payment receipting, creation of letters and statements and back rent calculation based on different calculation types. Accounts receivable functionality is fully integrated with the general ledger, cash receipting and accounts payable in Voyager for real-time data entry with batch and quick receipts, unlimited recurring charges and late fee management with grace periods. Furthermore, Voyager manages complex rent rolls, including overages and turnover rents, and tracks multiple checking accounts.

## Accounts Payable

Voyager streamlines the payables process and reduces costs by converting paper invoices into efficient electronic transactions virtually eliminating paper and mailing costs. Automated workflows create additional efficiencies as invoices are routed through the approval process through vendor payment. Voyager can generate both one-time and recurring invoices. The system can produce customizable rent statements and reconciliation letters to residents as well as generate statements in bulk for printing or sending automatically by email.



The Invoice Register Dashboard shows the status of all invoices, eliminates paper processing requirements and helps avoid bottlenecks with vendors. Data presented on the dashboard includes drilldown to vendors and payment status.

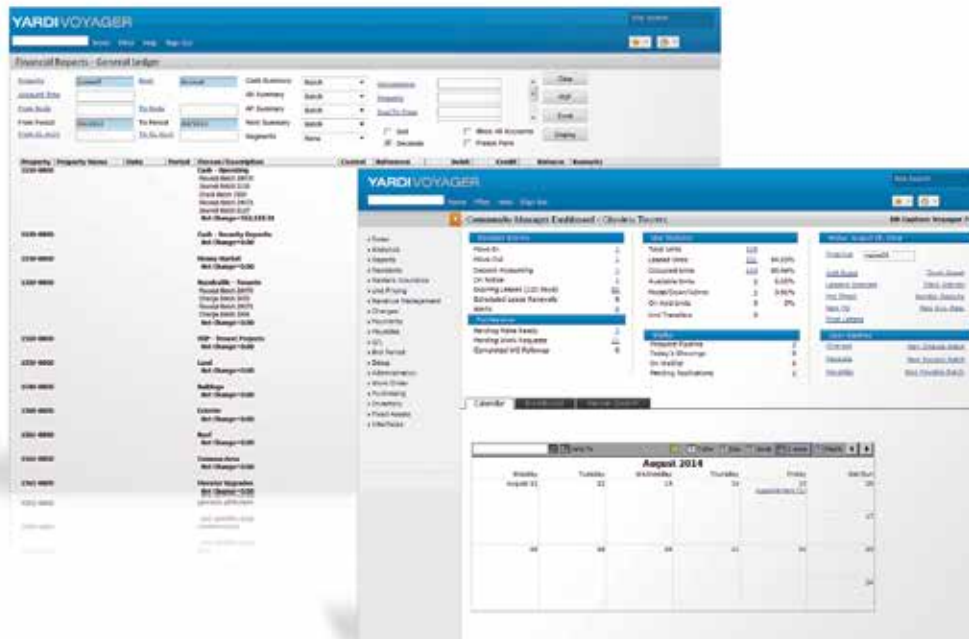
# Key Features

- Unlimited number of financial entities with varying fiscal years
- Recurring journal entries with formula-based calculations
- Analytic/audit dashboards for reviewing receivable, payable and job cost transactional data
- Simultaneous cash and accrual basis accounting
- Streamlined payables process that converts paper invoices into electronic transactions
- Comprehensive budgeting tools
- Automated bank reconciliation
- Automated utility allowance reimbursement payments
- Check writing capability with your paper stock

# General Ledger

The powerful general ledger allows your organization to use a single chart of accounts with configurable accounting segments. The system offers standard cash and accrual books with the ability to create multiple configurable books. Users can drill down to base transactions from high-level reports.

- Distribute expenses from a source property/entity to multiple target properties/entities based on predefined allocation percentages
- Create consolidated journal entries and apply them automatically to multiple individual entities based on percentages or statistical data



Role-based dashboards display tasks that need to be completed on a daily basis. Dashboard reporting gives a complete record of financial transactions with drilldown capabilities.

## Key Features

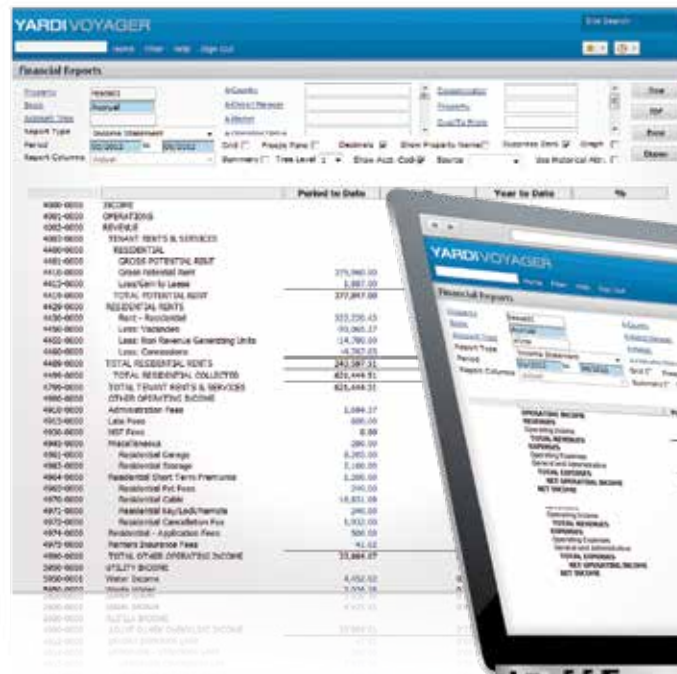
- Run all financial reports from a single screen with the financial analytics dashboard
- Drill down to the transaction detail from any financial report for unparalleled transparency
- Export any financial report to Excel or PDF format

# Financial Analytics

Financial analytics provide access to all financial data and key performance indicators enabling unprecedented access for agencies to review income, cash flow, balance sheet, budget comparison, trial balance, 12-month activity, quarterly activity, annualized reports and more. Voyager offers standard financial analytic reports with runtime filters based on user-defined, multi-tiered hierarchies. These can be displayed as a report on screen, exported to Microsoft® Excel or Adobe® PDF format, or saved as dashboard content. Reports include drill-down links to underlying transaction screens and reports.

## Account Trees

Voyager account tree functionality allows you to create endless variations of standard or custom reports quickly and easily. This eliminates the need for multiple charts of accounts. Custom account trees can accommodate your unique organizational reporting requirements. A custom account tree is a virtual collection of headings, accounts and totals mapped to your chart of accounts.



The report on the left represents a standard Voyager Income Statement; below is a comparable modified report of the same financial data in summary format using an account tree.

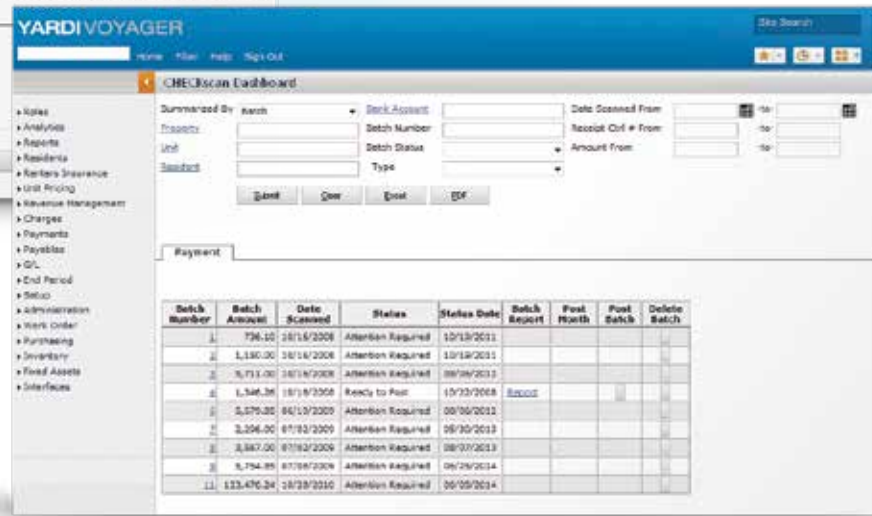


# Electronic Banking/ACH

Yardi Electronic Banking enables automated cash receipt and check clearing functions. In addition to special options for creating customized resident statements and coupons, it offers the sophisticated cash management controls needed in today's world of fast-paced electronic commerce. This valuable tool provides user confidence and control in property management operations with the same easy-to-use layout as your other Yardi products.



Voyager automates the check scanning process saving valuable time.



## Key Features

- Automatically link multiple payors with a resident
- Improve bank reconciliation process and avoid check fraud with reverse-positive pay and positive pay
- Generate custom resident statements, coupons and lock-box processing

# Affordable Housing

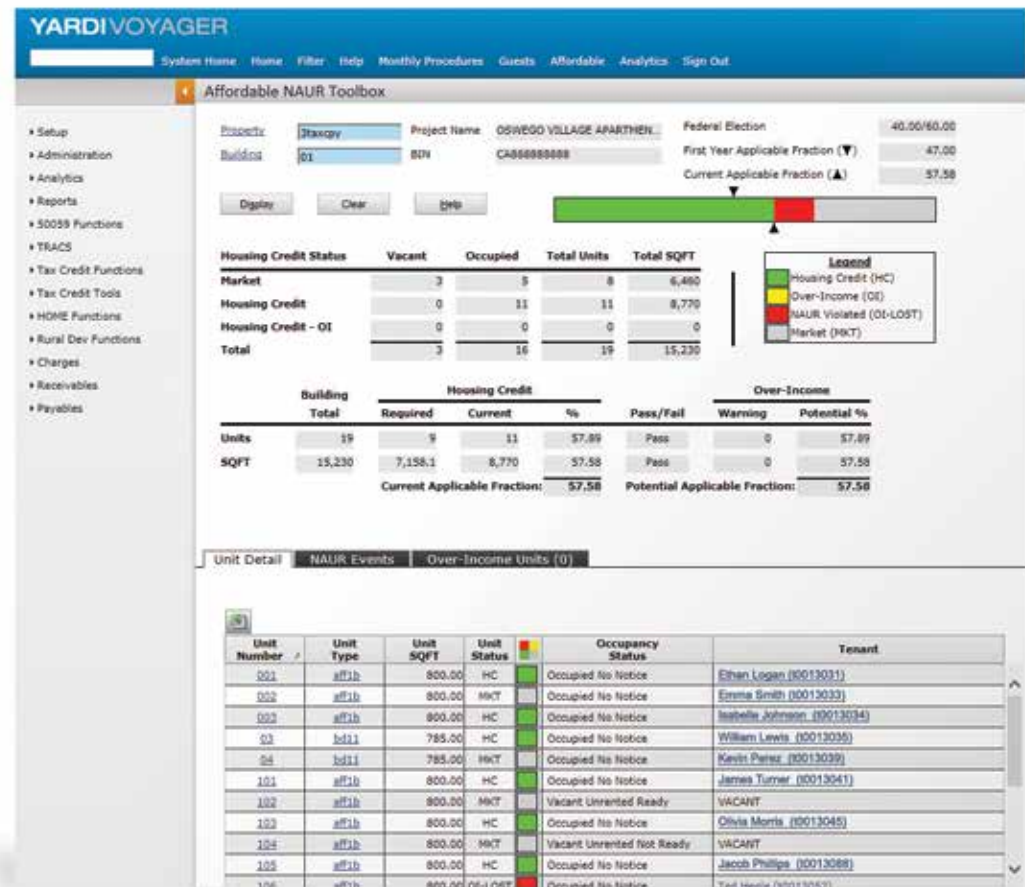
Provide staff with compliance workflows created by a dedicated team of Yardi affordable housing experts. Voyager provides intuitive browser-based navigation through everyday workflows for compliance with all major federal and state funding sources. Voyager can also be configured to track compliance data for many local housing policies and programs. Reduce training costs and prevent user mistakes with industry-leading software designed for affordable housing staff. Submit accurate reports on time with online connectivity to your funders' online reporting sites.

## Manage HOME Units

- Qualification of HOME households with one or multiple subsidies
- Household qualifying based on total or adjusted income as required
- Fixed and floating HOME units
- Rent limit history
- Automatic enforcement of HOME available unit rule
- State-specific tenant income certifications
- HOME unit mapping
- Automatic maximum rent override when combined with project-based subsidies

## Support Rural Development Properties

- Automated RD 3560-8 Tenant Certification Form and RD 3560-29 Notice of Payment Due Report
- Compatible with USDA chart of accounts
- Basic rent and overage tracking
- MINC interface
- General-ledger driven 3560-7 budget worksheet
- General-ledger driven 3560-10 balance sheet worksheet
- Easy rental assistance assignment



The Affordable NAUR Toolbox gives users a quick overview of their tax credit property's compliance.

## Support HUD 50059 Units

- Multiple subsidy types and contracts per property
- Gross rent change and automatic updates to later certifications
- Automated utility reimbursement payments
- Centralized TRACS processing of tenant and voucher files
- Automated iMAX interface
- One-step receipt processing of HAP voucher payments
- Printing of required compliance documents including 50059s, vouchers, model leases, 9887s and more
- Customizable reports, forms, letters and leases
- Flexible waiting lists
- Complete certification history
- Rent, HAP and utility reimbursements
- Supports debit cards for utility reimbursement payments

## Manage Tax Credit Properties

- Separate income and rent restrictions
- Automatic enforcement of the Available Unit Rule and Unit Vacancy Rule
- Set-aside layering at project and building levels
- Project mapping for fixed or floating set-asides
- Flexible recertification scheduling for tenant income certifications
- State-specific tenant income certifications
- State-specific unit event reporting
- One-step receipt processing of tenant-based voucher payments
- Complete certification history
- Automatic upload of tax credit data to state sites where applicable
- Tax credit recertification waivers
- Tax credit compliance monitor helps you predict impact of changes before they happen

## Key Features

- Single data entry and concurrent qualification reviews for multiple subsidies
- Online integration with reporting sites, including iMAX, TRACS and MINC
- Quick pre-qualifying and simple step-by-step qualifying
- 50059 baseline conversion tool
- Wizard workflow for pre-certification of applicants based on project type
- Customizable verification letters, recertification letters and other notices
- Dashboard summary of compliance tasks and alerts for tasks due

**5.8 MAT40 Move-Out Record**  
 Note: For suggestions on how and when to submit Move-Out transactions please refer to Chapter 4 - TRACS Operating Tips.

MAT Field	Note	Field Name	Start Position	Field Length	Field Type	Definition and Edit
14	MOC	Date of Death	118	8	Date MMDDYYYY	Required if the Move-Out Code is "4". The validity for the unit must end within 14-days of the date of death of the sole household member. However the actual move-out date may be after the 14 day period. After a death, the move-out transaction should be entered and transmitted ONLY when the owner agent is able to take possession of the unit (family members move out). It is proper to bill the subsidy until the unit is vacated. The MOC code 4 with an appropriate date-of-death issue generates a voucher adjustment to 14 days after the date of death if the unit is not vacated within 14 days.
15	MOC	Anticipated Voucher Date (Original Voucher Date)	126	8	MMDDYYYY	The voucher period in which the move-out adjustment is reflected. NOTE: "DD" (day) is always "00".
16	MOC	Correction Type	134	1	Alphanumeric	Blank = not a correction. E = A correction transmitted.

**Move Out / Termination Information**

Move Out Reason:

DoD Sole Member:

Termination Reason:

Voyager provides links to HUD Handbook 4350.3 and the MAT users guide within the user workflow, allowing users to verify HUD rules and regulations.

# Reports

Voyager includes more than 600 standard PHA reports as well as analytic tools for custom reporting. PHAs can also integrate advanced reporting solutions from Yardi and third-party sources for intensive data analysis.

## Voyager Analytics

Gain quick insight with flexible, on-screen reports and key performance indicators. Users can set up data filters which access real-time information from the Voyager database at levels such as property, resident, financial, job, budget and audit. Analytics can be displayed on screen and exported to Microsoft® Excel or Adobe® PDF.

## Spreadsheet Reporting

Generate custom reports in Excel using Voyager database tokens, with rich content such as graphs and pivot tables. At runtime, property management and financial data passes directly from the database to Excel for processing. Manipulate, calculate and graph data exported from the Voyager database directly to Excel for custom financial reporting.

## SSRS Reporting

Create presentation-quality reports with built-in Microsoft® SQL Server Reporting Services (SSRS) tools. SSRS enables ad hoc reports with visual components in Microsoft® Word, Excel, PDF and other formats. SSRS reports can display on multiple types of devices, including desktop computers and tablets.



A sample transaction recap report showing different types of payables and charges created in summary batch through the monthly posting process.

## PHA-Specific Reports

HUD requires specific reports from agencies to continue receiving subsidy. Voyager offers dynamic, real-time reporting that you can produce from live data.

### FDS - Financial Data Schedule

At the end of the year, HUD requires PHAs to submit financial statements on all programs and business activities.

### PHAS - PHA Assessment System

HUD measures the effectiveness of PHAs on physical and financial condition, management operations and capital funds.

### VMS - Voucher Management System

HUD monitors and manages an agency's use of vouchers on a monthly basis. VMS reporting helps HUD to fund, obligate and disburse in a timely manner based on actual PHA use of vouchers and funds.

### SEMAP - Section 8 Management Assessment Program

For agencies managing HCV residents, HUD requires you to annually submit a SEMAP certification. HUD uses this information to measure your agency's performance in fourteen key areas.

## Key Features

- Custom, powerful analytics, graphs and charts through SQL Server Reporting Services (SSRS)
- SQL scripting suited to large data volumes; results can be created in PDF format and saved in a logical matter for ease of review
- Comma-separated values (CSV) data extracts for use with Excel
- Ad hoc reporting with customizable correspondence in PDF format



## Key Benefits

- Automates recertifications for faster, timely processing
- Streamlines the applicant and resident experience
- Reduces staff interview and data entry time
- Standardizes interviews to help mitigate fair housing issues
- Increases document accuracy and completeness
- Reduces paper handling and storage costs
- Increases time for site managers to assist residents and applicants
- Facilitates timely, accurate communication with landlords for easy access to download forms and submit reports
- Features full integration with Yardi Voyager and Yardi ancillary products and services





# Online Eligibility Reviews & Recertifications

Save staff hours and cut administrative costs with a unique, online application process for PHAs.

Easily manage waiting lists, qualify applicants, serve residents and communicate with landlords.

# RENTCafé PHA

Simplify and expedite eligibility reviews and compliance documentation with RENTCafé PHA — an innovative way for PHAs to replace paper forms and applications. Provide convenient access to web-based rent payments, waiting list management, annual recertifications, landlord communication and more.

## Online Applications

Avoid the burden of handwritten paperwork and spend less time following up on incomplete submissions. With easy-to-navigate web forms, applicants can submit information when its most convenient using their mobile device or a kiosk in your office.

## Paperless Documentation

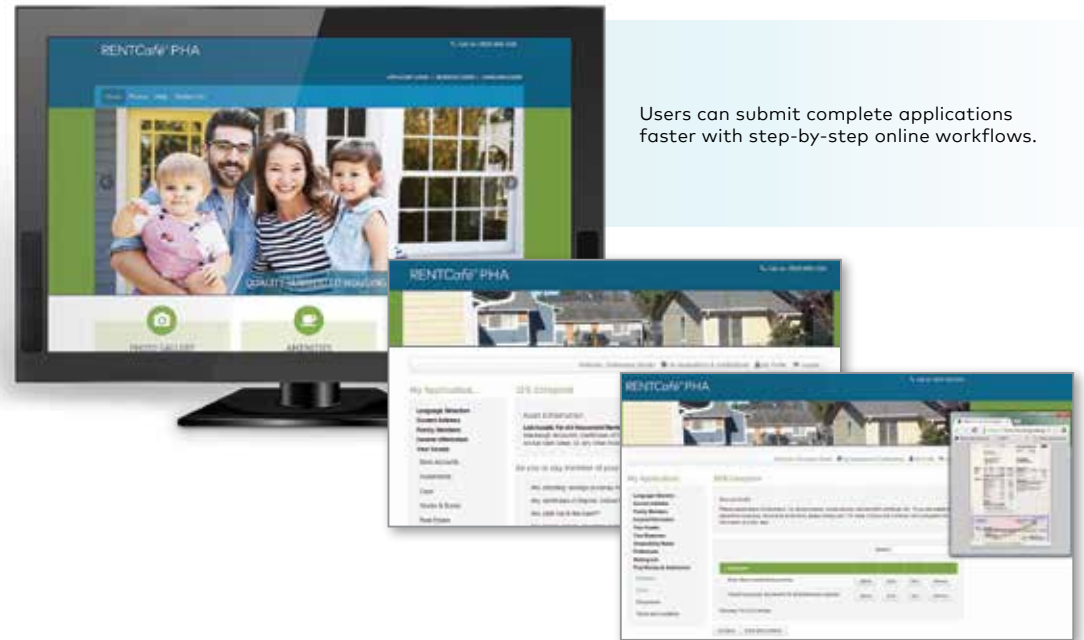
Help applicants avoid unnecessary trips to your office. Prospects can securely upload all required application documents to RENTCafé PHA. Electronic applications reduce costly and potentially unsecured storage of physical files.

## Faster Recertifications

Spend fewer staff resources on processing annual recertifications. Residents can submit household information when it is convenient for them, significantly reducing the time spent meeting with housing specialists.

## Self-Managing Waiting Lists

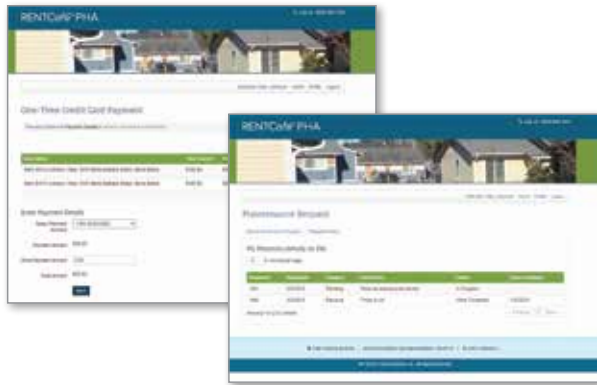
Purge waiting lists more efficiently, cut the cost of mailing notices to waitlisted households and spend less staff time on data entry. RENTCafé PHA is the only solution that enables applicants to confirm their status online for one or more waiting lists without mailing a form to your office for processing.



Users can submit complete applications faster with step-by-step online workflows.

Save time processing paper forms with an online waiting list solution.





Online payments and maintenance requests bring modern conveniences to your residents.

## Built-in Convenience

Use innovative features to transform the way your PHA works with clients. Highlights include:

- Self-service access for waitlisted households to confirm continued need for housing assistance
- Built-in translation service to accommodate clients with limited English proficiency
- 24/7 access for residents to update household information, request repairs, view account information, make payments and complete annual recertifications
- Convenient access for landlords to update their profile, view ledgers, get caseworker information, review inspections, set up payments, download documents and more
- Barcode printed correspondence for fast resident lookup with a scanning device



Landlords have online access to forms, so reporting is faster, easier and more accurate.

## Key Features

- Compliance tracking for HUD 50058
- Online applications for multiple PHA waiting lists
- Innovative online portal for self-service waiting list status updates
- Web access available 24/7/365 for reduced phone calls from applicants, residents and landlords
- Resident portals with online payments, maintenance requests, annual rent reviews and recertifications
- Landlord/owner login access for streamlined access to payment and other account information
- Customizable content including webpage layout, hyperlinks, pictures and more
- Barcode printed correspondence and online portals for reduced postage costs and paper processing

# Mobile PHA Solutions

Yardi offers various mobile solutions so you can provide resident services, complete operational tasks and approvals, and access your Voyager dashboards for real-time property management and accounting information from your mobile device. Mobile PHA solutions are optimized for iPhone®, iPad® and Android™ smartphones and tablets.

## Yardi Maintenance Mobile & Yardi Maintenance Manager Mobile

Maintenance Mobile allows maintenance techs to access assigned work orders from the field – with the ability to add labor and inventory to work orders, record time and enter notes, complete work orders in real time and create new work orders. With Maintenance Manager Mobile, maintenance managers can easily track technicians, assign work orders and manage their maintenance tasks from an Android tablet or iPad.

## Yardi PayScan Mobile

PayScan Mobile allows managers to search, view and approve purchase orders and invoice registers right from their mobile device. Approving managers can search for assigned purchase orders by PO number, vendor or expense type and efficiently review purchase orders and move them through the Voyager payable workflow for timely approval and payment.



## Key Features

- 24/7 access from a mobile device
- Mobile access to approve invoices and purchase orders any time
- Mobile scheduling, management and tracking of maintenance and inspection tasks
- Instant wireless assignment of tasks to technicians and inspectors in the field
- Intuitive dashboards, calendars and alerts

## Yardi Inspection Mobile

Inspection Mobile enables PHA staff to access and enter inspection data from a smartphone or tablet. Assigned inspections appear on an inspector's device instantly and completed results automatically update in Voyager. Inspection Mobile can operate in areas without a cellular or wireless connection and synchronize data once the connection is re-established.



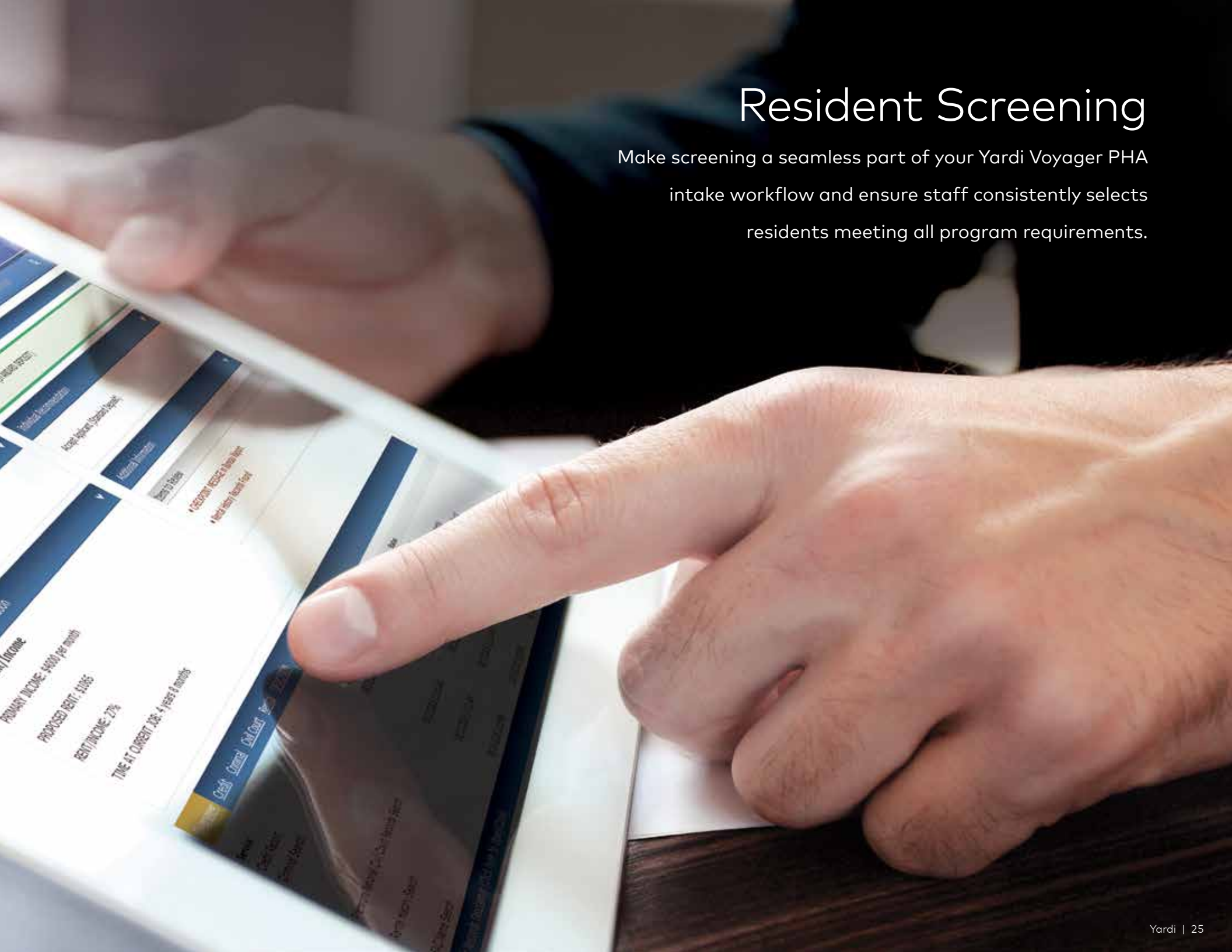
## Key Benefits

- Reduces loss from collections, evictions and legal action
- Automates consistent decisions and improves compliance with customizable rules
- Increases ease of use with one integrated system and simplified online leasing workflow
- Leverages resident history data in Voyager for better business insight



# Resident Screening

Make screening a seamless part of your Yardi Voyager PHA intake workflow and ensure staff consistently selects residents meeting all program requirements.

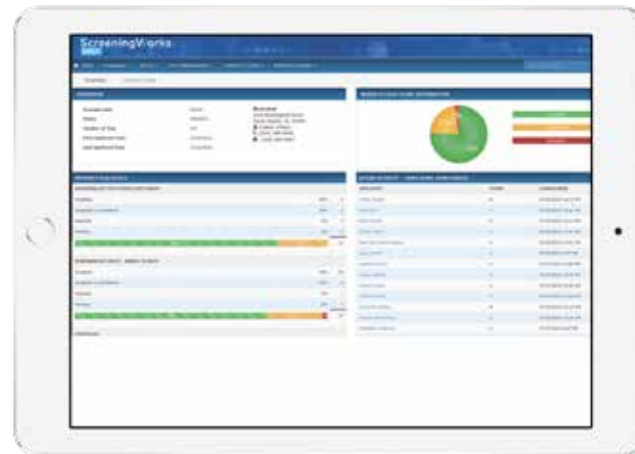


# ScreeningWorks Pro

ScreeningWorks Pro\* is a proven online resident screening system that delivers comprehensive reports so property managers can make smart rental decisions and minimize risk. You get credit reports from the three major bureaus, plus terrorist, drug trafficker, sex offender and Social Security fraud screening, rental payment history records and eviction and landlord/tenant civil court records. Using the most reliable data available, our solution eliminates guesswork and provides automated recommendations tailored for your properties to help you select qualified residents. The system is customizable for many housing subsidy programs.

## Confident Screening

Our solution delivers a reliable screening process to provide your rental staff with clear, consistent direction that supports your business rules. Screening workflow automation provides built-in control and cost savings and enables your staff to work more efficiently. Decision criteria are tailored for each property in your portfolio, so applicants will always be screened uniformly and according to your objectives.

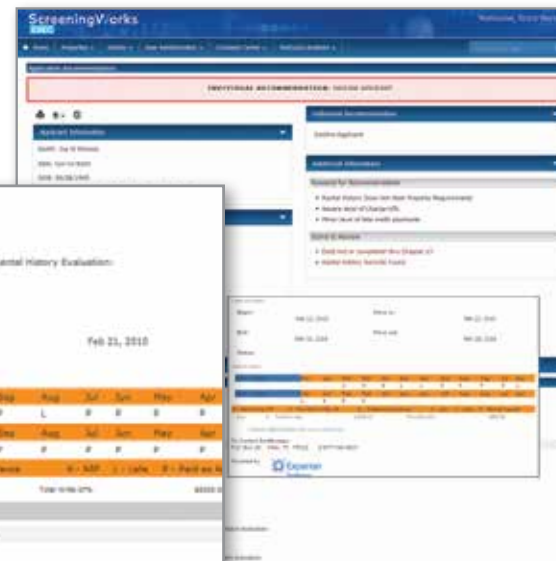
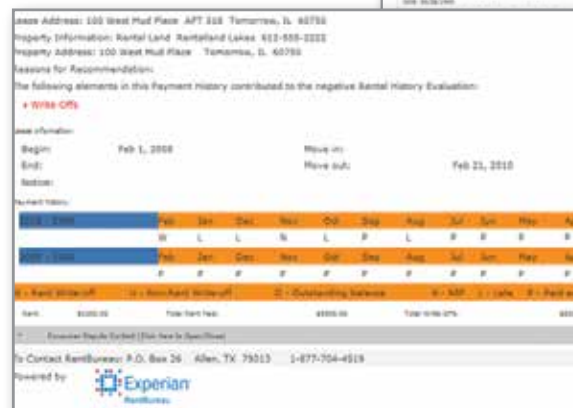


Analyze community and portfolio screening data on the ScreeningWorks Exec dashboard.

## Experian RentBureau Advantage

Gain a competitive advantage by adding Experian® RentBureau® data to your screening program. Experian RentBureau is the largest and most widely used database of rental payment information and currently includes data on more than 18 million residents nationwide. With ScreeningWorks Pro, you can leverage this data to factor applicants' rental payment history as part of your resident screening decision, which will allow you to accept better quality residents who have a history of paying rent on time.

\*Yardi Resident Screening in Canada

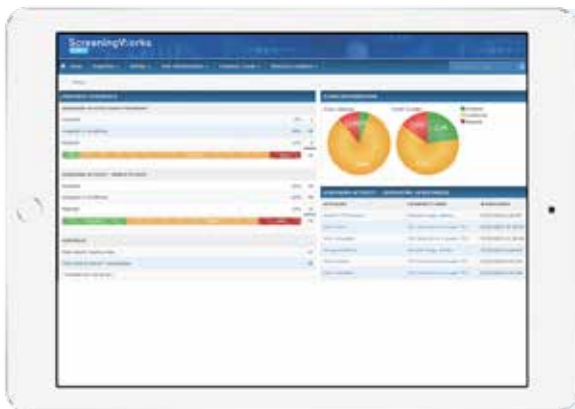
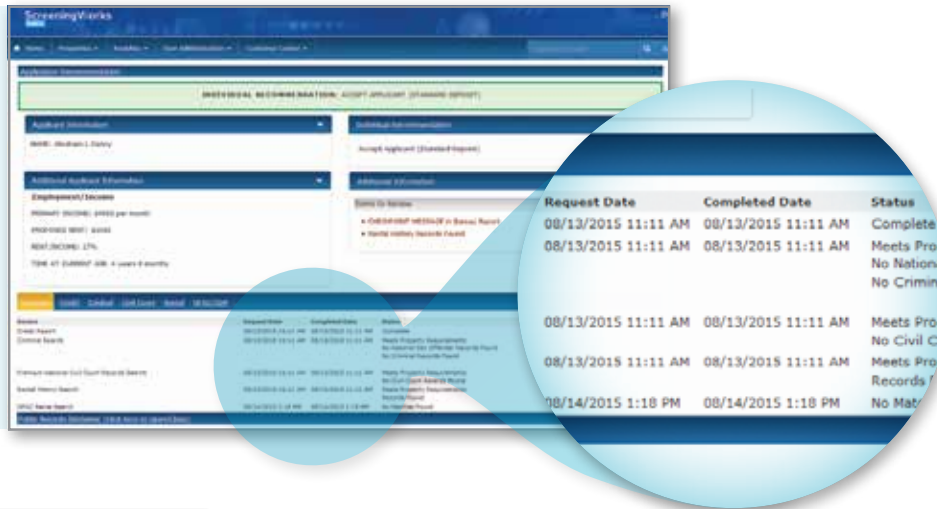


Incorporate rental payment history into your screening decisions by combining Experian RentBureau data with ScreeningWorks Pro. Property management companies and electronic rental payment processors automatically report payment data to Experian RentBureau every 24 hours.

# Strategic Advantage

Minimize risk and maximize revenue while maintaining compliant, safe and profitable communities. ScreeningWorks Pro provides a strategic advantage with management reports and analytics that shed light on your applicant traffic and performance. Experienced consultants are available to further assist in fine-tuning decision criteria to meet your goals.

Automate recommendations based on your criteria and help staff work more efficiently.



Oversee applicant traffic and property performance in a single snapshot with the ScreeningWorks Exec reporting dashboard.



Access the ScreeningWorks Exec dashboard and applicant reports on your smartphone.

# Key Features

- Integrated with the entire Voyager leasing cycle, including generation of lease documents
- Screening and operational data are combined for smarter organizational decisions
- Customizable rules automate consistent rental decisions and improve compliance
- Strategic analytics and executive reports provide insight into portfolio-wide traffic and screening activity
- Business profile reports available as an additional service
- Access to international credit reports for screening applicants who recently moved to the U.S.

## Key Benefits

- Increases resident satisfaction and maximizes your cash flow
- Saves time by scanning and digitizing paper checks and money orders in bulk
- Offers one-stop convenience and reduces money order issues with walk-in payments
- Provides secure instant access, confirmations via text message
- Streamlines accounts payable with automated vendor and owner payments
- Auto-transfers electronic deposits and payments to and from your bank account
- Eliminates manual errors and time-consuming bank trips







# Payment Processing

Save time and maximize cash flow with a payment processing solution that eliminates bank runs, automates rent collection and simplifies vendor payments.

# Yardi Payment Processing

Increase resident satisfaction and office efficiency with Yardi Payment Processing. Manage accounts receivable and accounts payable with one system that helps you streamline rent collection, cut operational costs and reduce processing errors. Make collecting rent and other fees easier with user-friendly payment options that eliminate bank runs for your staff. Your residents can conveniently pay rent by check, online, via text or at participating retailers. Your staff can more quickly process incoming payments and outgoing payments to vendors and owners.

## Collect Online Payments

Offer paperless self-service rent payments with a recurring payment option using Yardi Online Payments. Residents can log in at any time, view their account balances and pay rent directly from a bank account (ACH payment) or with a credit or debit card. Online payments are entered directly into Yardi Voyager, with automatic deposits and easy bank reconciliation. ACH payments are sent to your bank via EFT the next day. Credit and debit card payments are processed within 2-4 days.

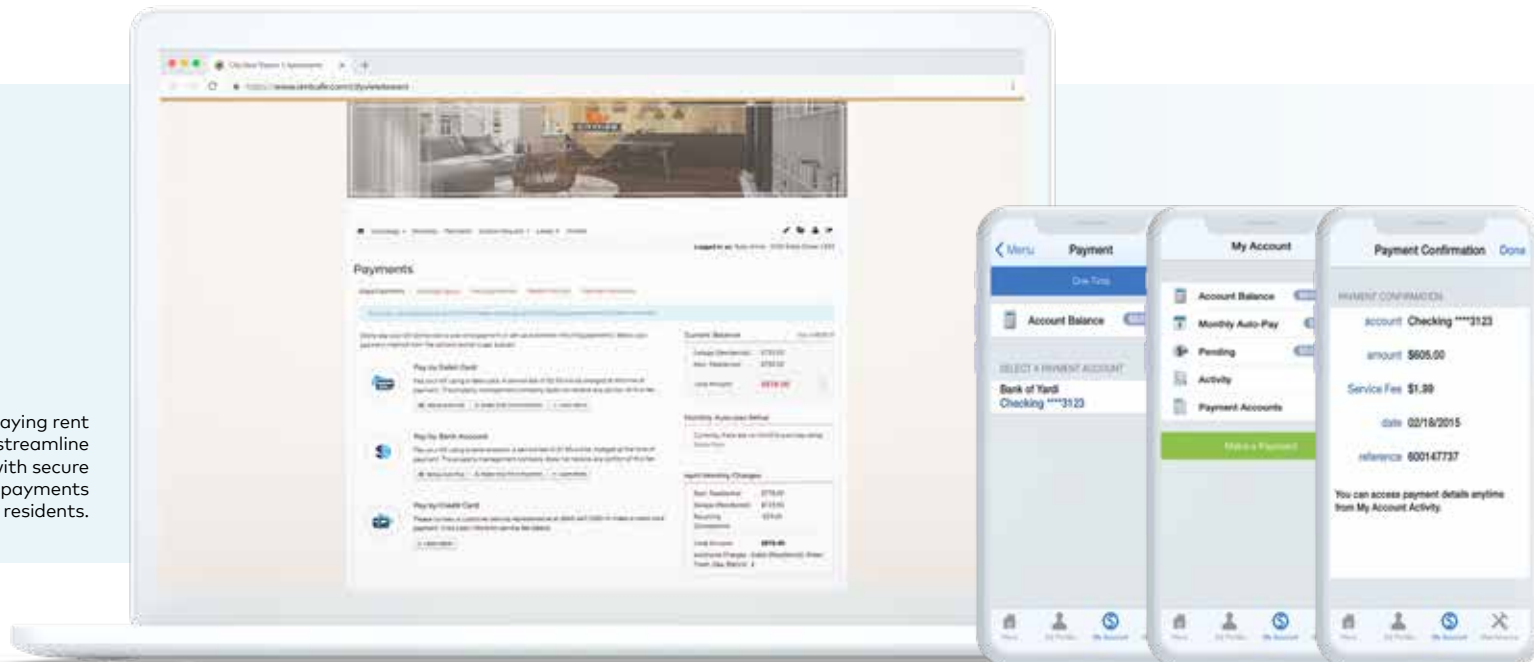
## Collect Text Payments

Give residents 24/7 convenient and secure mobile access to review balances and make payments via SMS text messaging with RENTCafé TextPay. Immediate confirmation is provided to residents making text payments from a bank account or credit or debit card. Rent payments are automatically entered into Voyager, improving operational efficiencies while increasing resident satisfaction by providing an in-demand mobile service.

## Collect Check Payments

Eliminate trips to the bank, lost checks and manual keying errors while reducing NSF risk with Yardi CHECKscan. Scan bulk batches of personal, corporate, bill pay and cashier's checks as well as money orders to greatly reduce processing time. Instantly create receipt batches in Voyager for all items and permanently store the image files. Payments are transferred electronically to your financial institution the next day, optimizing your cash flow.

Make paying rent easier and streamline collection with secure online payments for your residents.



## Collect Walk-in Payments\*

Let residents pay rent in cash at over 20,000 participating retail locations. Our walk-in payment system (WIPS) provides the ease of a one-stop experience and reduces money order issues for your staff. This service can be easily added to your existing Yardi cash management system. Electronic payment confirmations are automatically available in Voyager the next day. Funds are made available within three business days.



## Pay Vendors & Owners\*

Speed up the vendor and owner payment process with Yardi Bill Pay. Invoices are seamlessly routed through your approval workflows. Bill Pay automatically pulls payments from your Voyager database and fulfills them based on how you pay each individual. Vendors and owners receive payment via your choice of mailed check, ACH or credit card.

\*Not currently available in Canada

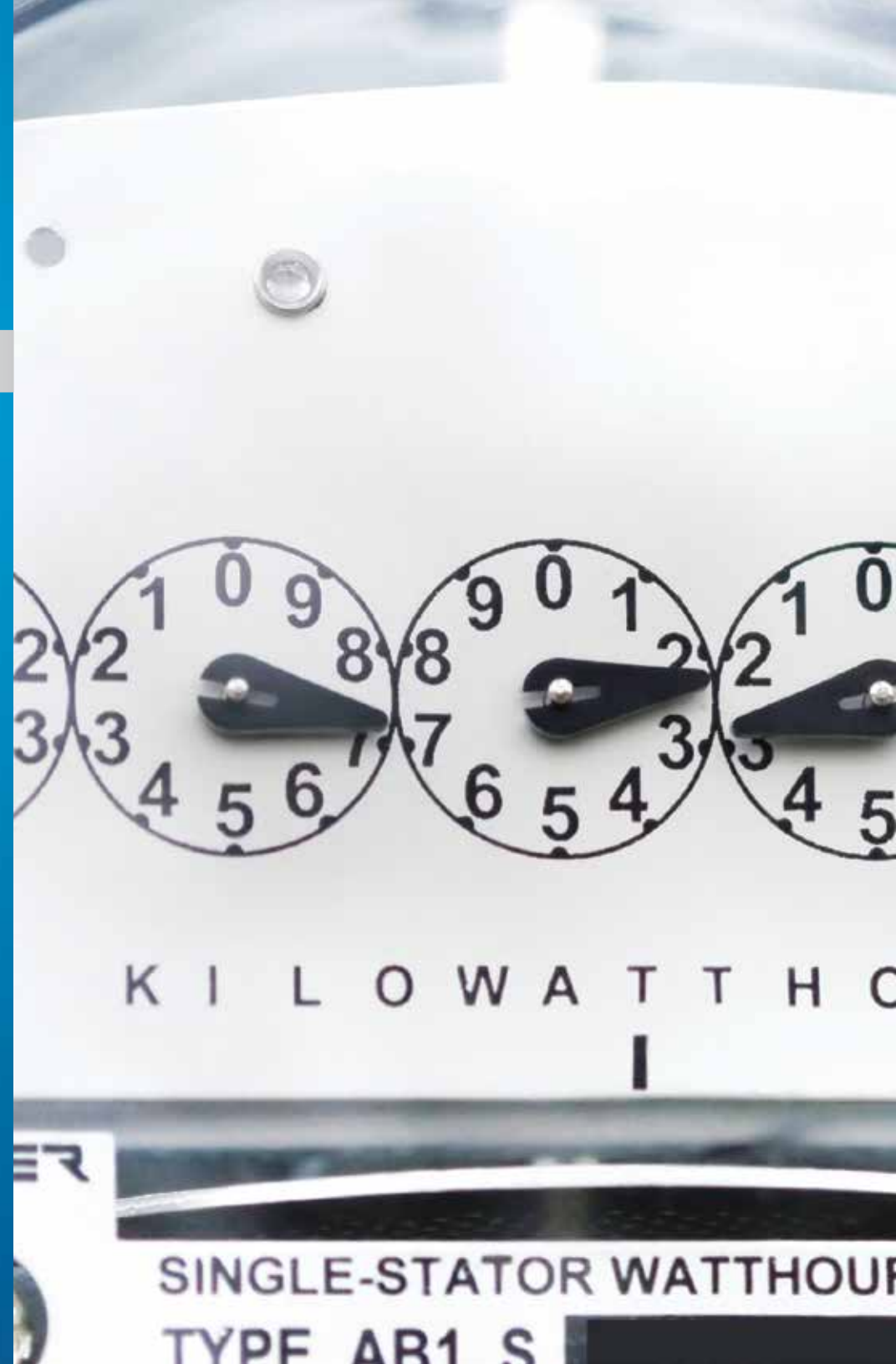


## Key Features

- Electronic deposits for rapid availability of funds
- 24/7 resident access to make online payments
- Credit and debit card and ACH resident payments with recurring ACH option
- Walk-in payment service for cash payments at participating retail locations
- Voyager auto-matches charges and applies payment priority rules
- Permanent check image storage for scanned payments
- Automated check writing and electronic vendor and owner payments for outgoing accounts payable
- Full-service check writing and distribution by our check writing service organization
- All transactions instantly recorded in Voyager

## Key Benefits

- Offers convergent utility billing that can increase collections by 20%
- Provides full transparency and visibility for more proactive management of your utility costs and assets
- Reduces time spent on annual utility budgets
- Identifies errors and costly leaks that need repair and provides easy creation of work orders in Voyager
- Saves you time and money with paperless utility invoice processing
- Gives stakeholders holistic and granular views into utility data in one single platform





# Energy

Eliminate manual utility processes and increase cost recovery with an energy management suite built into Yardi Voyager. Maximize efficiency and leverage proactive analytics to better control your expenses.

# Yardi Energy Suite

Choose a single solution for energy management built into Yardi Voyager for streamlined processes, better decision-making and reduced operating expenses – without data transfer or integration issues. Consolidate utility data for visibility and reporting with your existing Voyager workflows while giving residents access to one portal. The Yardi Energy Suite includes solutions for submetering and billing, utility payable processing and data capture, and analytics for sustainability and benchmarking.

## Utility Billing

Use Yardi Utility Billing to maximize utility cost recovery in Yardi Voyager without interfaces, transfer or manual data entry. Leverage accurate allocations and 24/7 live resident support to increase operational efficiency while maximizing cash flow. Find the right solution for your buildings among multiple submetering and billing options with support from our regulatory staff.

## Submeter Management

Reduce costs and promote conservation by charging residents for their exact and accurate consumption with submeters, meter reading and exception alerts visible in Voyager. We provide professional turnkey installation and project management for new construction and retrofit installations and ongoing system maintenance by our in-house network of experienced technicians.

## Resident Experience

Give residents single online access to consumption data, statements, maintenance and payment options with convergent billing through RENTCafé. By aligning utility billing with resident activity workflows in Voyager, you can automatically recover final bills when residents move out and monitor vacant unit costs when residents move in.

### Utility Billing

- Combine with Voyager and RENTCafé to eliminate data transfer issues
- Recover vacant costs using existing resident activity workflows
- Proactive exception handling with built-in work orders

### Utility Expense Management

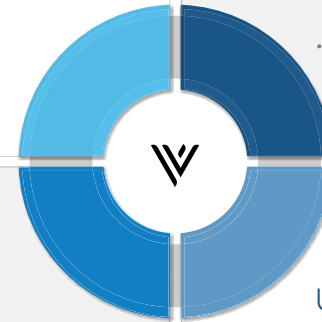
- Simplify accounts payable and budgeting with utility invoice processing, validation, data capture and more
- Save money on late fees with invoice tracking and faster processing
- Follow existing workflows and get access to data in Voyager

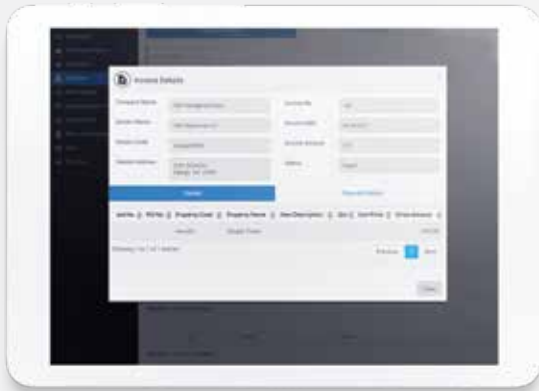
### Pulse Dashboards

- One platform for all energy data using existing property lists and attributes
- Data is normalized for comprehensive reporting for all stakeholders
- Access data for ENERGY STAR® benchmarking, GHG emissions and more

### Utility Bill Payments

- Yardi Bill Pay offers outsourced check printing and ACH payments
- Yardi Bill Pay credit card payments (both physical and virtual) create a frictionless payment process
- Complete the automation of the invoice processing cycle





## Utility Expense Management

Reduce costs and automate payables with electronic invoice processing, billing validations, vacant use analysis, utility consumption and cost analytics, and optional utility bill payment. Yardi Utility Expense Management includes streamlined invoice tracking, collection and processing that greatly reduces late fees and shut-off notices. Collect and access valuable utility data with payable workflows, GL coding and bill image storage in Voyager. Get reliable, high-quality utility data audited for exceptions and proactive resolution to potential issues that saves you money and helps you make business decisions.

## Bill Payments\*

Speed up the utility payment process with Yardi Bill Pay. Invoices are seamlessly routed through your existing approval workflows. Bill Pay automatically pulls payments from your Voyager database and utilities receive payment via your choice of mailed check, ACH or credit card.

## Utility Benchmarking & Analytics

Access utility data from invoices and resident billing in a single dashboard for analytics reporting and actionable intelligence for improved decision-making. Easily view trends and changes, create work orders from exceptions, quickly benchmark your portfolio using normalized comparisons down to the meter level, leverage budgeting features to give stakeholders visibility into asset value, and consolidate expenses, exceptions and cost recovery into one reporting platform.

Leverage our expertise and add-on services to help you meet your sustainability goals, GHG emissions and ESG reporting needs. Our team of Certified Energy Managers®, engineers and MBAs have broad experience and knowledge to identify conservation opportunities that meet your business initiatives. Add our benchmarking services to offload time-intensive ENERGY STAR reporting, compliance and certifications. Save even more money with detailed utility rate and tariff auditing and resolution support.

\*Not currently available in Canada



## Key Features

- Integrated visibility to maximize utility recovery
- Cost and consumption analysis with monthly reconciliation
- Submeter installation and full-service maintenance options
- Automated meter readings and submeter data analysis to identify leaks and variances
- Convergent billing tied into your Voyager move-out workflow
- Resident portal access to improve collections
- Dedicated regulatory staff and service teams
- 24/7 live call center support for residents, with call details (and recordings by request) logged in Voyager for quality control
- Electronic invoice processing with vacant unit cost recovery, rate and tariff analysis and optional bill pay
- ENERGY STAR benchmark reporting
- Utility reporting dashboards and actionable intelligence

## Key Benefits

- Provides financial oversight with real-time cost, commitment and budget comparisons portfolio-wide
- Helps maintain tight cost control with automatic over-budget monitoring of every transaction
- Establishes governance with predefined workflows and rules consistent with Yardi Voyager
- Controls capital expenditure budget allocation process
- Includes extensive analytic reporting







# Job Cost

Improve cost control, budget oversight and profitability for construction projects of every size and description — from capital expenditures and single-unit improvements to ground-up developments.

# Yardi Job Cost

Keep projects on track with heightened cost control, complete budget oversight and accurate forecasting and management of contracts, commitments and cash flow. Manage all types of construction projects including CAPEX, tenant improvements, space renovations and property development.

## Construction & Development

Support projects at all phases, from pre-development to close-out, and for any duration. You can also develop financing plans and manage contract commitments, draws and progress billings from general contractors and subcontractors, and complete projected final and cash flow forecasting.

## Job Costing & Budgeting

Track actual costs automatically and compare them to the job budget. You get full visibility into all committed costs and change orders, with real-time job cost and general ledger updates as transactions are entered. Billing and draws can be created easily by actual costs incurred or percent complete, and charges automatically generated for recovering costs.



## Comprehensive Reporting

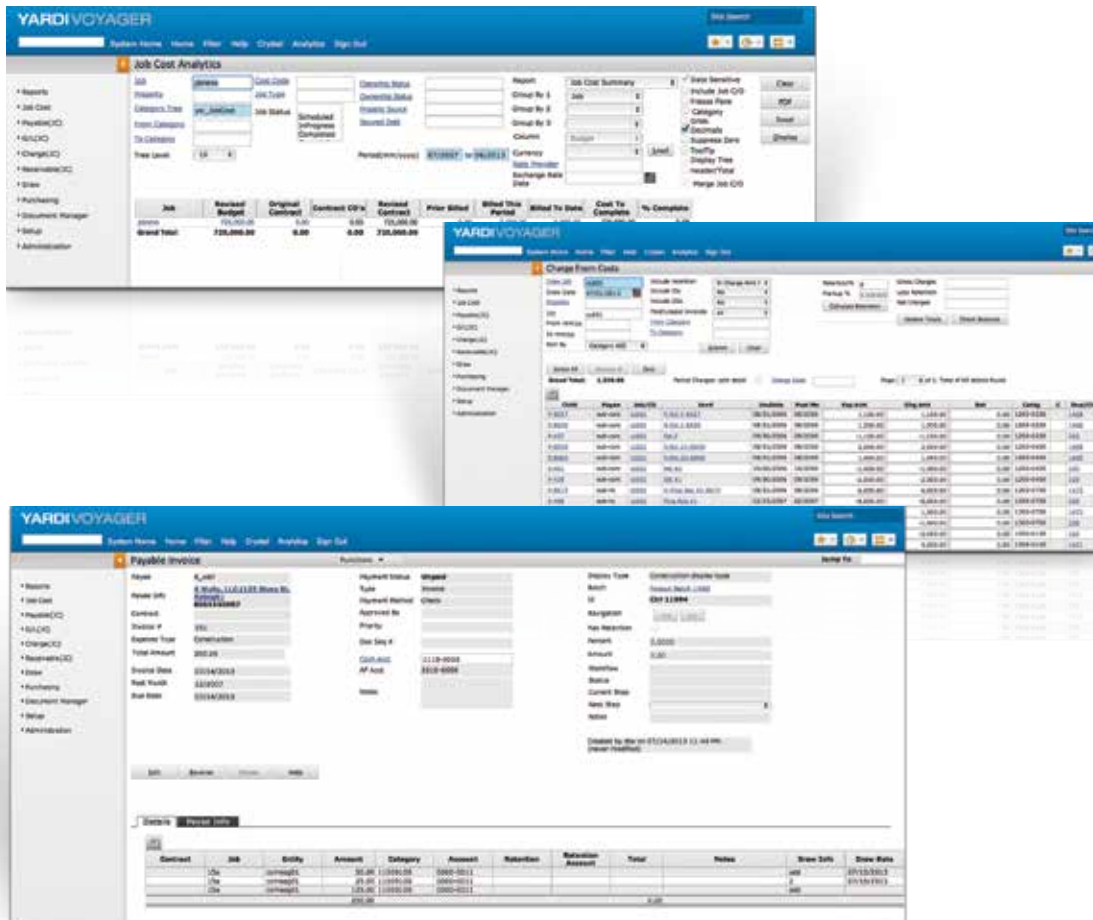
Strengthen your reporting with comprehensive information related to budget amounts, revisions, commitments, change orders and amounts billed to date per category. Slice the data any way you like — by property, job, cost code or job attribute, among many other options.

# Key Features

## Increased Flexibility

Apply user-defined workflow approvals for jobs, budgets, contracts and budget transactions. Simplify your work by hiding unused features and fields. Define your own fields for capturing pertinent data for historical purposes and reporting.

- Unlimited, user-defined budget cost categories with templates and models
- Full contract and change order, committed cost tracking and analysis
- Detailed, real-time recording of job costs and other actions across the entire construction lifecycle
- Multiple job cost summary and detail reports with drilldown to underlying transactions
- Custom, automated workflow approval for jobs, job budgets and revisions, contracts and change orders
- Multiple points of access for importing and exporting data
- Custom job cost analytics for creating your own reports
- Seamless integration with Voyager



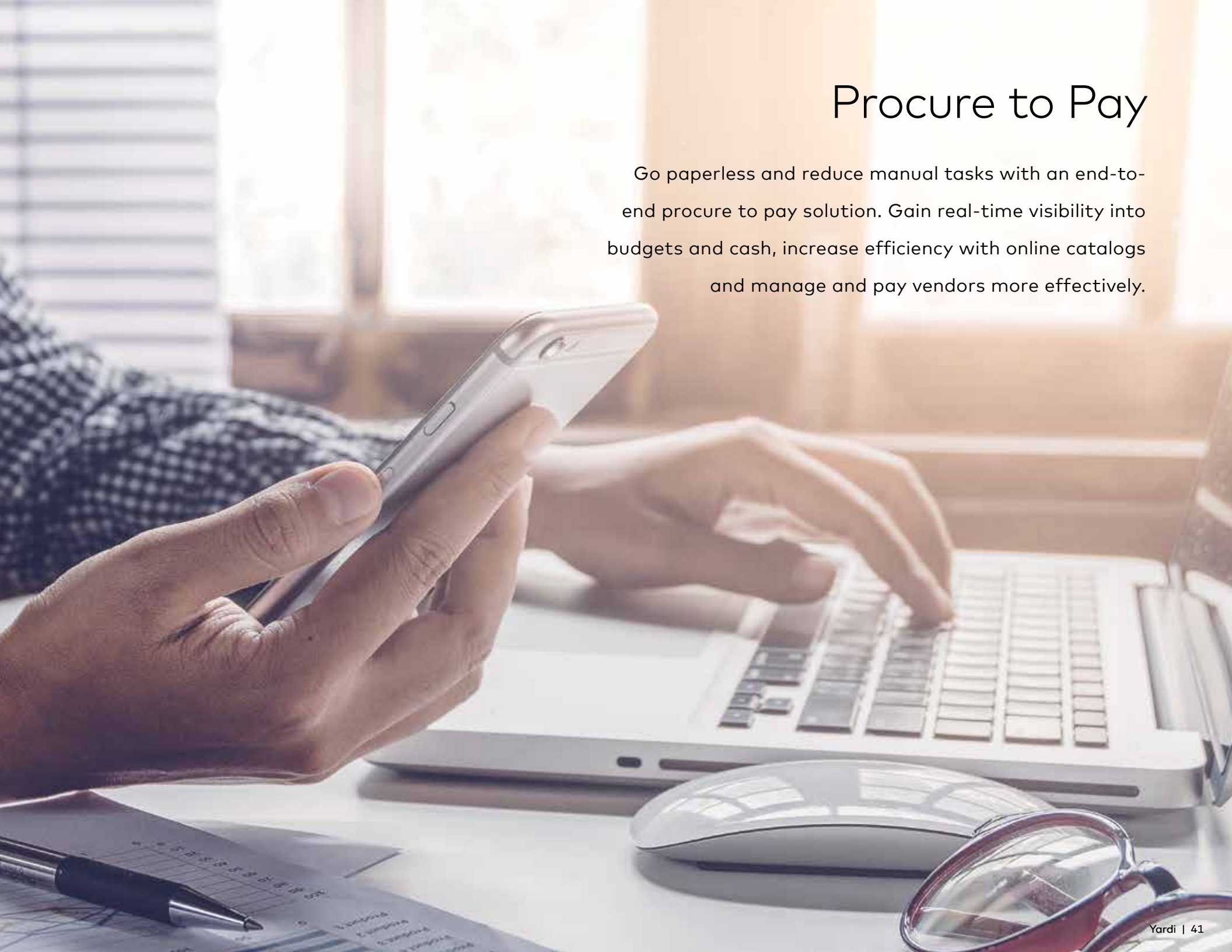
## Key Benefits

- Saves money by consolidating procurement spend into one platform
- Enables better decision-making with real-time Voyager data
- Provides powerful analytics to support continuous process improvement
- Increases efficiency and productivity with online and mobile workflows
- Eliminates interfacing with third-party systems
- Saves time and drastically reduces scanning, keying, printing and other manual tasks
- Gives vendors real-time transparency into their business with you
- Identifies potential at-risk vendors and develops strategies for managing them



# Procure to Pay

Go paperless and reduce manual tasks with an end-to-end procure to pay solution. Gain real-time visibility into budgets and cash, increase efficiency with online catalogs and manage and pay vendors more effectively.



# Yardi Procure to Pay

Gain efficiency and productivity across the procure to pay process while attaining real-time transparency into your budgets and cash flow. The end-to-end Yardi Procure to Pay platform includes powerful vendor management tools, flexible purchasing catalogs, electronic processing and approvals for purchase orders and invoices, and seamless outsourced vendor payments.

## Paperless Invoice Processing

Yardi PayScan is a paperless, mobile-enabled invoice workflow platform that provides a 360-degree view of transactions from check to payable to invoice to purchase order, work order, job or contract. In addition, all budget and cash data is available in real-time. Use powerful analytics to drive continuous improvement across your procure to pay process.

## Full-Service or Email Invoice Processing

Reduce costs and increase efficiency even further with Yardi PayScan Full Service or Yardi PayScan Email Processing. With Full Service, Yardi provides a dedicated PO Box and email address for vendors to submit invoices. With Email Processing, vendors email the invoice directly to Yardi and we enter the data into Voyager for you. All invoices show in Voyager as invoice registers, ready for you to review, approve and process as payables.

### Payments

- Yardi Bill Pay offers outsourced check printing and ACH payments
- Yardi Bill Pay credit card payments (both physical and virtual) create a frictionless payment process
- Complete the automation of the Procure to Pay cycle

### Vendor Management

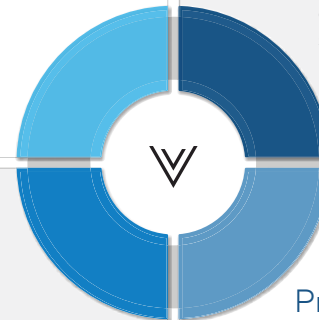
- VendorCafe provides a web/mobile platform to help manage vendors more effectively
- VendorCafe provides vendors real-time invoice and payment transparency
- VendorShield reduces risk and helps automate vendor screening and onboarding

### Invoice Processing

- Yardi PayScan offers web/mobile invoice processing
- Vendors submit invoices to Yardi for scanning and data entry
- Yardi Utility Expense Management drastically reduces time spent on utility invoices

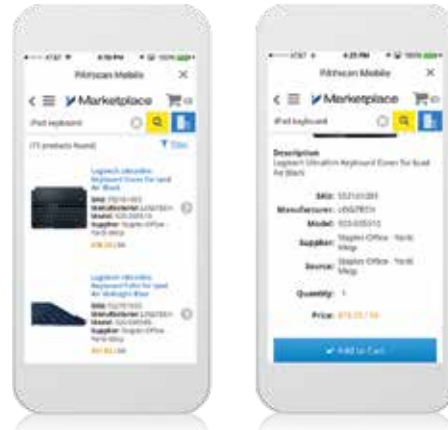
### Procurement

- Yardi Marketplace offers a web/mobile purchasing platform with powerful reporting
- Your suppliers and pricing reside in one procurement platform (Yardi catalogs also available)
- Deep integration allows electronic invoices to flow directly into PayScan



## Online Procurement\*

Yardi Marketplace is an online and mobile MRO shopping platform. Manage suppliers and leverage contracted pricing in one platform with off-the-shelf supplier relationships and catalogs or create your own online catalogs. Yardi Marketplace works seamlessly with PayScan to process invoices electronically. Get insightful reporting that gives you full control of your organization's procurement activity.



## Key Features

- Centralized and powerful procurement platform
- Full audit trail capabilities to enforce compliance
- Open invoice monitoring and real-time view of cash
- SKU-level reporting to identify potential savings
- Electronic invoicing with Yardi Marketplace and VendorCafe
- Full-service invoice importing and data entry to eliminate self-scanning
- Invoice matching to POs, contracts, WOs and jobs
- Simple management of W-9, COI, service contracts and other documents
- Integrated mobile app for online invoice approvals and review

## Vendor Management

Empower your vendors to manage their business with you through the VendorCafe online and mobile portal. Vendors can submit invoices and view invoice status, payment details, purchase orders and work orders in real time. Invoices submitted electronically through VendorCafe import immediately into PayScan. VendorShield simplifies management of Form W-9s, certificates of insurance, service contracts and other documents.



## Simplified Bill Payments\*

Speed up the vendor payment process with Yardi Bill Pay. Invoices are seamlessly routed through your approval workflows. Bill Pay automatically pulls payments from your Voyager database and fulfills them based on how you pay each vendor. Vendors receive payment via your choice of mailed check, ACH or credit card.

\*Not currently available in Canada

## Key Benefits

- Ensures fewer equipment breakdowns with preventative maintenance scheduling
- Enables fast response to maintenance requests with mobile access
- Facilitates oversight of maintenance personnel with location tracker
- Features graphical display of key performance indicators
- Includes maintenance, inspection and fixed assets modules







# Maintenance Management

Schedule, track and manage all preventative, routine and emergency maintenance from your desktop or mobile device — and gain modules for managing inspections and fixed assets at no extra cost.

# Yardi Advanced Maintenance

Yardi Advanced Maintenance is your solution for complete scheduling, tracking and management of asset maintenance from your desktop or mobile device. The solution supports all types of real estate market segments including, but not limited to, multifamily, subsidized, senior, military, condominium, HOA, retail, office and industrial properties. You can schedule preventative, routine and emergency maintenance tasks. A location tracking feature allows you to match technicians with tasks, ensuring rapid response to emergency requests.

## Maintenance Manager Mobile

Yardi Advanced Maintenance includes the Yardi Maintenance Manager Mobile app which helps you save time, boost efficiency and increase tenant and resident satisfaction by taking your maintenance workflow mobile. Maintenance managers can easily track technicians, assign work orders and manage their maintenance tasks from an Android™ Tablet or iPad®.

## Facilities Management

Stay informed about your properties' maintenance operations via intuitive, customizable dashboards. A guided workflow simplifies and expedites the work order creation process. Key performance indicators help you assess work order response and completion, employee activity and material usage. Also, the solution integrates with VendorCafe to allow you to request and manage vendor proposals from your tablet.



## Key Features

- Full planning and scheduling of maintenance tasks
- Complete history of work orders
- Fewer equipment breakdowns with preventative maintenance scheduling
- Complete history of all fixed assets
- Fast response to maintenance requests with mobile access
- Oversight of maintenance personnel with location tracker
- Graphical display of key performance indicators



With Advanced Maintenance, you receive additional products for managing assets at no extra cost, including:

### Yardi Maintenance

Perform and track daily maintenance for your properties with unparalleled ease and efficiency.

### Yardi Inspection

Schedule, perform and manage all types of inspections including annual, regulatory, due diligence and more.

### Yardi Fixed Assets

Record and monitor fixed assets from purchase order issuance through purchase, use and final disposition.

## Key Benefits

- Delivers accurate revenue projections based on defined leases and rollover assumptions
- Provides greater flexibility and insight with unlimited budget revisions and ability to copy and combine budgets
- Improves collaboration during budget management processes
- Ensures tighter security with integrated access control settings





# Budgeting & Forecasting

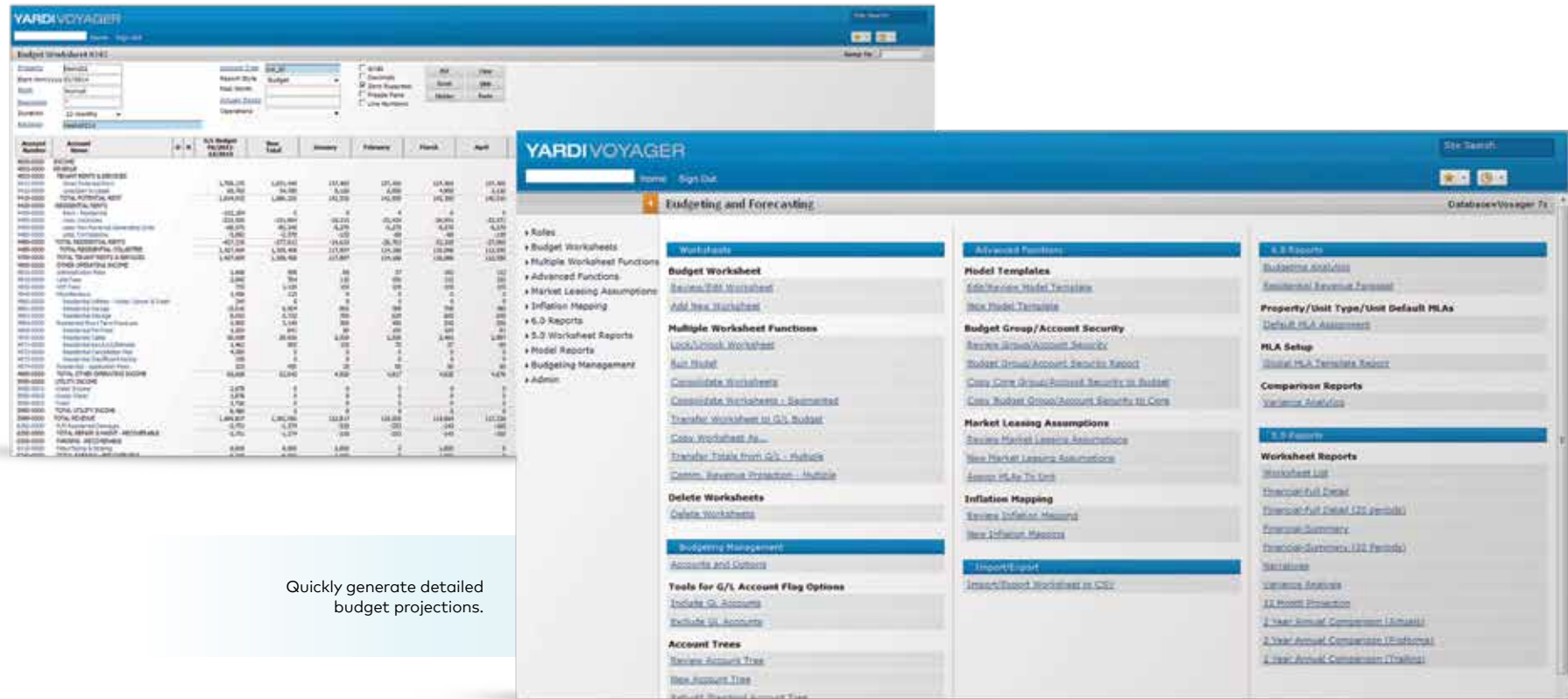
Plan for every financial scenario with flexible forecasting  
and real-time market conditions.

# Yardi Voyager Budgeting & Forecasting

Yardi Budgeting & Forecasting makes portfolio budget projections more accurate and efficient with detailed analyses and comparisons of current and future income and expenses. Gain unmatched flexibility in budget preparation scenarios and streamline your financial planning processes.

## Accurate Projections

Analyze and compare financial projections using budget worksheets. Commercial property owners can project future revenue from existing leases, including variables such as planned rent increases and expected recoveries. Real-time market leasing assumptions can also be applied to expiring commercial leases for added accuracy.



Quickly generate detailed budget projections.

## Key Features

- Unlimited budget revisions with ability to copy and combine budgets
- Security settings to assign users with access, read and write capabilities
- Exports budget data to Microsoft® Excel
- Documents comments, variances and action items using budget details and narratives
- Uses variance analysis to identify amounts that exceed specified budgeting thresholds
- Enables zero- and task-based budgeting
- Generates a wide variety of budget-to-actual comparative reports
- Controls general ledger account access to budget worksheets
- Ability to lock worksheets and hide accounts from unauthorized users

## Configurable Projections

Integrated with Yardi Voyager, Yardi Budgeting & Forecasting makes it easy to project financial scenarios using actual general ledger accounts and budgets. Forecasts can be based on market condition assumptions and be configured with data variables from Yardi Voyager.



## Key Benefits

- Speeds up employee onboarding with courses that blend Yardi software training, live instruction and custom policies and procedures
- Reduces skill and knowledge gaps within the organization by recommending content that focuses on relevant job skills that are appropriate for each learner
- Consolidates training program administrative tasks to a single platform
- Automates recertification processes, due dates, notifications and compliance reporting
- Improves employee performance by encouraging staff to explore new skills in safe practice areas
- Builds a robust culture of learning with achievements, peer discussions and assignment feedback tools
- Achieves better accountability and knowledge retention over traditional training
- Boosts employee confidence with relevant and effective training resources that improve job efficiency





A photograph of a man and a woman in a professional setting. The man, with a beard and wearing a dark suit, is leaning over the woman, who is wearing a pink top. They appear to be in a meeting or collaborative work environment. The background is bright and slightly blurred, suggesting an office with large windows.

# Learning Management

Create a personalized learning experience that maximizes knowledge retention and job satisfaction.

# Yardi Aspire

Get more value from your training budget. Yardi Aspire eclipses traditional staff training programs with on-demand digital content designed to improve job performance, reduce staff turnover and eliminate outdated teaching methods.

## Remove Barriers to Learning

From the moment they open the software to the moment they complete their training, the user experience needs to be seamless. That's why Yardi Aspire integrates with all the main identity providers, including YardiOne to allow employees to bypass the need to log in to learn. The personalized student dashboard, training recommendations and assignments, and customized course and event catalog target relevant competency areas that support the independent, proactive learner. Custom Learning Plans allow the employee to view their training plan and learning steps unlock automatically as prerequisite steps are completed.

## Automate User Management

Save time and avoid input errors with automated data transfers. Yardi Aspire supports data transfer to and from third-party learning management, talent management and HR systems. Administrators can set up automated, regularly-scheduled data transfers that streamline employee onboarding, reduce training administrative costs and ensure accurate reporting by consolidating students' comprehensive training activities.

## Customize Your Catalog

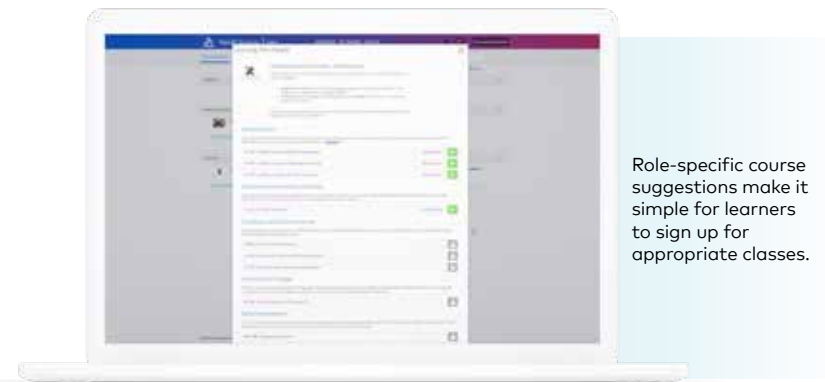
Yardi Aspire users have unlimited access to over 1,100 engaging elearning courses that provide variety of immersive software training across the Yardi product suites. Yardi Aspire Plus and Yardi Aspire Premier clients benefit from hundreds of courses in compliance, safety, leadership, leasing, professional development and more. All courses promote active learning with multimedia, animations, branching, hot spots, software simulations, virtual reality and interactions incorporated throughout. Clients can customize the courses using in-platform authoring tools to incorporate important company policies, procedures and custom messaging.

## Increase Staff Compliance

Keep staff informed and prepared to comply with the latest legislation and changing regulations. Yardi Aspire compliance courses not only describe the laws, but provide a relevant examples to help your staff stay aware of potential areas of risk relevant to their role in the organization. Current offerings include Federal Fair Housing education (general and maintenance technician-specific) and harassment training (employee and supervisor versions). Flexible Bilingual Spanish versions allow your team members to select their own language preference while you issue and monitor completion on a single course.

## Craft Learning Plans by Role or Competency

Yardi Aspire's learning plan feature is a quick, strategic way to communicate what self-paced courses, events, tests, eSign documents and surveys must be completed for a specific training program to be considered completed. Control the order and assignment timing, plus completion due dates within each plan. Yardi Aspire offers nearly 100 role-based learning plan templates and mini-certification templates that can be used as is or customized to fit your organization's needs.



Role-specific course suggestions make it simple for learners to sign up for appropriate classes.

## Make Live Events More Effective

Gain centralized management tools for classroom, webinar and in-person events. Trainers can schedule single or recurring events, interface with integrated web conference and meeting tools such as Zoom, Webex™, Adobe® and Citrix® to import actual attendance data into your Yardi Aspire reporting. Extend your training program by importing free, Yardi-taught software training webinars on a variety of Yardi products. Integration helps trainers eliminate costly data entry errors, organize their calendar of events, manage attendance and report on student attendance. Yardi Aspire makes it easy to distribute training materials and set up pre- and post-event surveys to measure effectiveness of live events.

## Organize Employee Resources

Make it easy for Yardi Aspire users to find exactly what they need to make training more successful and their everyday work more efficient. Yardi Aspire administrators can use searchable and securable resource containers to curate relevant content from many different sources and deliver it to specific groups of users who need it most. Yardi Resource templates are available to quickly set up a rapid learning library of Yardi software training videos and quick reference sheets on a variety of Yardi product topics.

## Sign Documents Digitally

eSign is a time-saving and paperless feature built into your Yardi Aspire university that allows you to upload your organization's PDFs and build a digital library of documents that can be signed electronically to acknowledge policy statements or certify completion of goals and tasks. With eSign, users can insert custom signature files, select from included templates or create one from scratch on a tablet. eSign also has text fields which enable users to insert comments into the form. Eliminate the need to download, print, sign, scan, upload or email forms. Get it all done online quickly and with a convenient, digital audit trail.

## Collect Employee Input

Create custom surveys and assess response data without leaving Yardi Aspire. Gain faster access to survey responses and analyze data easier by avoiding import/export from third-party survey software. Collect company-wide feedback by sending surveys via platform email or in a resource container. Gain learner input by including surveys in your courses courses and learning plans. Insert surveys in event descriptions to gauge registrant's learning goals, experience level and dietary restrictions. Schedule surveys to send automatically after live events to elevate instructor performance, training effectiveness and class feedback.

## Use SCORM Courses In Yardi Aspire

Yardi Aspire supports SCORM courses created in other authoring platforms, or those purchased from third-party vendors. Upload your external SCORM courses as a page within a course and issue it as a step in a learning plan. Customize the SCORM-based course using Yardi Aspire authoring tools to add custom pages that embellish the off-the-shelf content with your organization's unique twist, like custom procedures, policies, tests, eSign documents and assignments before and after the SCORM course. Customizing SCORM content has never been so easy.

## Key Features

- Centralized solution for online courses, live training events and organizational resources
- Integration with a variety of identity providers and webinar, video hosting and help desk software providers
- Manual and scheduled reporting to track learner progress and organizational trends
- Role- and group-based course deployment
- Extensive curriculum developed and maintained by Yardi and industry experts
- Intuitive authoring tools for quick course creation and rollout modifications to learners
- Support for multimedia formats including SCORM, HTML, documents, images, audio and videos
- Mobile access through all major handheld devices and web browsers
- Training and consultation from experienced Yardi Aspire experts
- Easy-access search function for staff to find company-wide resources

## | Energized for Tomorrow

At Yardi our mission is to provide our clients with superior products and outstanding customer service, while we take care of our employees and the communities where we work and live. With that commitment, Yardi leads the industry in providing full business software solutions for real estate investment management, property management, financial accounting, asset management and ancillary services. Organizations like yours have been using our proven and mature software with confidence for decades.

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