Affordable Housing

AFSP

Spotlight on Affordable Housing

Join us for a discussion of recent and upcoming product changes. This session will be a great foundation for the affordable housing courses scheduled this week. We will highlight important features to be aware of that could help streamline your organization’s processes. [All Subsidy Types]

AF060

RENTCafé Affordable Housing Roundtable

RENTCafé Affordable Housing provides extended resident and prospect portal features to affordable housing providers, residents, and applicants. Join a discussion with your peers to learn how this product helps improve the prospect and resident experience while reducing the cost of compliance. [50059, Tax Credit]

AF102

Introduction to RENTCafé CRM Affordable Housing

Join us for an introduction to RENTCafé CRM Affordable Housing. During this class we will take a look at the affordable-specific features of this CRM system, as well as the workflow when the system is integrated with RENTCafé Affordable Housing. [All Subsidy Types]
New Features Update: RENTCafé Affordable Housing
RENTCafé Affordable Housing continues to evolve. Join us as we discuss the new waiting list functions within Site Manager, customizable compliance page narratives, and detailed reporting for your property management and compliance staff. [All Subsidy Types]

RENTCafé Affordable Housing Applicant Workflow
Interested in automating your compliance interviews or allowing prospects to complete applications conveniently from anywhere? Check out this overview of RENTCafé Affordable Housing from the applicants’ point of view. Learn just how easy accurate compliance interviews have become! [All Subsidy Types]

RENTCafé Affordable Housing Site Manager
This course will explore and demonstrate the features and work processes designed to manage online applications. From initial applications to annual recertifications, you will see how the RENTCafé Affordable Housing experience seamlessly ties into your Voyager software. [All Subsidy Types]

Affordable Housing Best Practices
In this course we will share the best practices our support teams have discovered while working with our clients over the years. We will discuss the tools within Voyager to help your company be more efficient and effective. [All Subsidy Types]

Local Programs: Introduction
Managing multiple compliance programs on a property can be challenging, especially when state, city, and local programs are added to the mix. Join us as we preview a new addition to Voyager Affordable Housing known as Local Programs. In this session we will explore how to manage an unlimited number of compliance programs with conflicting rules, income, and rent limits. Learn how to set up and administer local programs including establishing income and rent limits on a program-by-program or unit-by-unit basis. Discover how applicants are determined qualified or unqualified for any compliance program mix. [Local Programs]

Affordable Housing Letters & Forms with FillDocs: Introduction
Use Word to create, customize, and fill letters, notices, leases, and other compliance-related correspondence. In this introductory class you will learn the basics of creating a Word template file for verification letters and notices, the use of tokens to pull data from Voyager, and how to find lists of pre-defined tokens. [All Subsidy Types]

Repayment Agreements Part 1: Setup
As TRACS 203A goes live, HUD now requires that every repayment agreement and its status be reported to TRACS each month. This means that all repayment agreements must be managed in TRACS software (Voyager). This two-part course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the Repayment Agreement feature in Voyager Affordable Housing. This feature allows users to track repayment agreements and associated expenses, and automates monitoring and forwarding collections to HUD. We will also discuss changes in repayment processing as a result of TRACS 203A changes. This course is the first of two sessions over which we will review setting up repayment agreements. [50059] (Part one of a two-part series.)

Repayment Agreements Part 2: Workflow
As TRACS 203A goes live, HUD now requires that every repayment agreement and its status be reported to TRACS each month. This means that all repayment agreements must be managed in TRACS software (Voyager). This two-part course discusses the current state of repayment agreements and demonstrates how repayment agreements are made much easier with the Repayment Agreement feature in Voyager Affordable Housing. This feature allows users to track repayment agreements and associated expenses, and automates monitoring and forwarding collections to HUD. We will also discuss changes in repayment processing as a result of TRACS 203A changes. This course is the second of two sessions over which we will review setting up repayment agreements. [50059] (Part two of a two-part series.)
AF231  Converting to TRACS 203A  
This class will discuss how the TRACS 203A version may impact your policies and procedures as well as affect the way you interact with Voyager Affordable Housing. There will be some changes throughout Voyager; this is a way to get familiar with them to make your life easier during the transition. [50059]

AF240  Best Practices for Vouchers  
HAP voucher processing is a critical function for 50059 properties. Learn the best practices for posting, correcting, and auditing HAP vouchers in Voyager. [50059]

AF260-1  Affordable Housing Accounting Part 1: Setup  
Proper setup of affordable housing accounts is critical to the efficient and effective use of Voyager Affordable Housing. Attend this course to review the best practices setup of affordable housing accounts and how these accounts will affect financials. You will learn how to set up the affordable housing general ledger accounts, including the suspense account, and where to map this information to ensure that monthly activity reflects correctly on financials. [All Subsidy Types] (Part one of a three-part series.)

AF260-2  Affordable Housing Accounting Part 2: Monthly Procedures  
Proper monthly procedures can help optimize the performance of Voyager Affordable Housing. Attend this course to learn more about different Voyager options that can enhance monthly processes at affordable properties. You will learn how to use tools for correcting resident ledgers when data entry mistakes occur or when retroactive subsidy adjustments are needed. [All Subsidy Types] (Part two of a three-part series.)

AF260-3  Affordable Housing Accounting Part 3: Reports  
Voyager Affordable Housing receivable reports are designed to reflect the financial condition of affordable housing properties. Attend this course to learn about affordable housing receivable reporting options available in Voyager. You will learn about affordable housing receivable reports and how they differ from residential reports. The course also provides an overview of the monthly tie-out process between the sub-ledger and general ledger for affordable housing properties, including a review tool available to troubleshoot tie-out issues. [All Subsidy Types] (Part three of a three-part series.)

AF265  Ending Subsidy  
Do you have a property where you no longer need to track compliance? Join us to understand how to turn Affordable Housing functionality off by property or resident with this new procedure. [All Subsidy Types]

AF270  Tax Credit Best Practices  
This course discusses best practices and setup of tax credit properties within Voyager Affordable Housing. Learn about recertification waiver implementation, rent restrictions that differ from income restrictions, the new Tax Credit Rent Change function for utility allowances, and discuss necessary monthly and annual tasks that ensure continued compliance. [Tax Credit]

AF275  Income Averaging  
As income averaging becomes more defined, Voyager Affordable Housing will help you stay in compliance. Join us to see how Voyager will work with this new minimum set-aside election within LIHTC. [Tax Credit]
AF280  Rental Assistance Demonstration (RAD)
Since its introduction with TRACS 202D, the Rental Assistance Demo (RAD) program has grown to incorporate conversions from Rent Sup, RAP, and Mod Rehab subsidy types. In addition, HUD has changed phase-in rules and has introduced the concept of negative HAP. Join us for a discussion of these and other items as we explore RAD changes in TRACS 203A. We will talk about conversion scenarios and the use of new miscellaneous accounting request codes to be used for zeroing first year vouchers, billing for unit rehabilitations, and recovering negative HAP. [50059]

AF286  RENTCafé Affordable Housing Waiting List Features
This course will explore and demonstrate the applicant experience using RENTCafé Affordable Housing to apply to the affordable housing waiting list. We will demonstrate various Site Manager tools including allowing applicant updates, sister property filtering, waiting list ranking and moving from a waiting list pre-application to a full move-in application. [All Subsidy Types]

AF287  RENTCafé Affordable Housing Site Manager: Admin Tools
This course will cover advanced topics and features currently available in RENTCafé Affordable Housing. Join us to get an overview of unique tools and reports to enhance your property manager, resident, and applicant experience. [All Subsidy Types]

AF318  Affordable Housing Letters & Forms with FillDocs: Advanced Topics
Use Word to create, customize, and fill letters, notices, leases, and other compliance-related correspondence. In this advanced class you will learn how to set up your Tax Credit Lease, combine many separate documents into a single report package, as well as additional advanced features available using FillDocs. [All Subsidy Types]

AF904  The Latest on HUD Updates +
TRACS 2.0.3.A will be released February 1, 2019 and implementation will continue through June 30, 2019. Mary Ross will lead this class with an introduction to the changes introduced in the TRACS 2.0.3.A update. [50059]

AF926  All About RAD for Project Rental Assistance Contracts (PRAC) +
Industry expert Mary Ross designed this session for those owner/agents who are interested in or who have closed PBRA RAD deals. This class provides an explanation of the differences between the PRAC and PBRA RAD programs and what to expect. [50059]

AF927  Converting from PHA to RAD +
Join industry expert Mary Ross for a review of the checklist used when converting from Public Housing to PBRA RAD. [50059]

AF932  Receiving & Addressing TRACS Error Messages +
Don’t ignore messages from HUD! Join Mary Ross to discuss how to best retrieve and address TRACS errors and messages. [50059]

AF945  Income Discrepancies & Repayment Agreements +
This two-part session provides you with information about the EIV Income Discrepancy Report, how to document the tenant file, and how to set up a repayment agreement when a resident receives an improper payment. Join Mary Ross, industry expert, to understand the best way to handle these new requirements. [50059]
Yardi’s PHA software contains many useful tools that can significantly increase your staff’s efficiency. This session will spotlight some of the recently-released product enhancements.

This introductory course will be a presentation on the highlights of the latest PHA and RENTCafé PHA releases and an overview of what is in development now.

Attendees of this class will learn how to make the most of Voyager’s Inspection functionality. Topics will include automated scheduling, reinspections, bi-annual inspections, automated QC inspections, and a brief discussion of Yardi’s plans for UPCS-V.

This useful new functionality gives clients the ability to automatically attach key PHA reports to applicant, tenant, and landlord records within Voyager and RENTCafé PHA.

This class will include Yardi’s best practices for managing waiting list applications incorporating Voyager and RENTCafé PHA. We will discuss effective application and communication management, best purging practices, and how to initiate and schedule eligibility packets.

Learn how RENTCafé PHA can streamline the online waiting list application process. This class will include best practices for duplicate prevention, automated communications, and a discussion on the latest system changes.

This course will provide a comprehensive overview of the RENTCafé PHA tenant and landlord Portals. Topics will include online rent payments, maintenance requests, and ledgers for tenants. HCV landlords will be able to manage bank accounts, and view inspection and payment history.

Recertifications are an integral part of an agency’s daily activities. This course will teach you how to leverage Voyager and RENTCafé PHA to effectively and efficiently recertify families. Topics will include best reporting practices, online recertifications, streamlining verifications, and communications with participants.

This session is designed to introduce basic Moving to Work configuration and processing in Voyager. This class is ideal for those considering application to the MTW program.

This new feature integrates Voyager PHA with the power of Microsoft Sharepoint Online. Document management has never been simpler with automated meta tagging, search features, and integrated Voyager security.

This session covers key financial features of Voyager PHA. Topics will include tenant repayment agreements, landlord and tenant overpayments, and garnishments.

This session will detail the life cycle of Family Self Sufficiency (FSS) addendums from enrollment through exit. Topics covered include the basics of addendums, escrow management, and reporting.
PH248  PHA Best Practices: Unit Transfers +
PHA portfolios can be very complex, with unique transfer challenges. Discover Yardi’s best practices for unit transfers.

PH256  Project-Based Voucher RAD
This class will cover all of the elements of the Rental Assistance Demonstration (RAD) conversions in Voyager, from Public Housing and Mod Rehab to Project Based Voucher 50058s (PBVs). This comprehensive class will cover ending participation in the Public Housing and Mod Rehab program, conversion to the new portfolio, and management of the tenants under the new program with an emphasis on RAD-specific requirements such as continued FSS, EID, and phase-ins.

PH290  PHA Potpourri
PHA Potpourri provides an opportunity for clients to ask questions about Voyager PHA that may not fit within the context of other classes offered at the Forum. This class is always lively, covers a wide range of topics, and is highly interactive.

PH310  FDS Reporting +
Financial Data Schedule (FDS) reporting is critical to all PHAs. Learn how to edit and audit FDS reporting in Voyager.

PH320  Managing PHA/Affordable Combination Properties
This class will explore how to manage layered 50058/Tax Credit/HOME/Market properties within Voyager 7S. Topics covered will include the latest changes for identifying discrepancies in Tax Credit/PBV and HCV properties.

PH325  Portability Finance
This class will include detailed discussions regarding PHA portability finance management. Learn about the use of suspense charges in portability receipting, how to manage admin fee updates, and other critical functions for successfully managing portability.

Senior Living
COMMUNITY MANAGEMENT

VSLSP  Spotlight on Senior Living
Join us as we highlight recent and upcoming product changes. This session will be a great foundation for the Senior Living courses scheduled during the Forum. We will highlight important features in the Senior Living suite of products that could help streamline your organization’s processes.

VSL110  Resident Lifecycle & Billing
Attend this course to master the tools you need to properly manage your census and generate accurate billing and statements for your payers.

VSL130  Co-occupant Management
Learn senior living co-occupant management features, including shared contacts, second resident rates, shared payer code for check scans, joint unit transfers, and streamlined handling when one of the occupants moves out. Guidance will be provided for new implementations as well as for clients transitioning from legacy second resident functionality.

VSL210  Voyager Senior Housing Best Practices: Setup & Administration
This session examines the setup options available and best practice recommendations for fundamental elements of your Voyager community management software. System-wide components, as well as community-specific settings that affect billing and other routine procedures, are discussed. The session will also explore the nuances of configuring senior housing units and services.
VSL230  Voyager Senior Housing Toolbox: Tips & Tricks
Learn tips and tricks to address common questions and issues. This course will look at toolbox items specifically for senior living as well as the standard Yardi utilities toolbox. Learn what each tool does (and doesn’t do), and when to use it. The course also includes a demonstration of the toolbox’s reporting capabilities.

VSL235  Medicaid: Overview & New Features
Within our Claims Manager module, review the Medicaid setup that is based on compliance and state requirements. This course includes an overview of the Claims Manager module general setup, logic, Medicaid billing, Medicaid receipts, and Medicaid resident procedures, such as leave of absence, rate updates, and payer/template changes.

VSL240  Property Takeover & Conversion
When you’re taking over a property or changing ownership, what tools should you use? This course provides an overview of data conversions, standard import, and ETL tools, as well as built-in tools such as Archive Property. We will also cover reports available for validating your data and steps to take to produce your first billing.

VSL245  Month-End Tie-Out & Troubleshooting
The month-end process can be time sensitive, which results in the need to quickly tie out financial transactions. In this course, we’ll take a detailed look at the process, what to look for, and provide troubleshooting tips. With this knowledge, you’ll have the tools to help you master this time-sensitive task.

VSL260  NIC Reporting: Review of the Setup & Data Collection Process
Recently, Yardi collaborated with NIC to improve and streamline the NIC data collection process. Yardi is the first software vendor to be certified as a NIC Actual Rates Software Partner. This course will cover the simple, one-time setup that is needed to crosswalk your information to the NIC preferred format. Once setup is done, it’s a simple process to collect and send the data to NIC. This course will cover both the setup and ongoing process of submitting data to NIC.

VSL290  Senior Living Menu Security +
The Senior Living Suite includes functionality that uses both the Voyager platform and the VoyagerPlus platform. As a result, there are a few differences between permissions, menu sets, and user management. In this course, we’ll review the differences so that you have the skills to effectively set up and manage users of Senior CRM, Voyager Senior Housing, and EHR.

VSL320  Medicaid New Features & Troubleshooting
Medicaid is complex and accurate Medicaid billing requires thoughtful attention. In this course, we will explore the new Medicaid features available in our Claims Manager module: paper claim form reports, electronic transmission, additional claims mapping fields, and payer associations. We will also discuss troubleshooting techniques for common mistakes made when performing everyday Medicaid tasks.

ELECTRONIC HEALTH RECORDS

EHR010  EHR Roadmap & Roundtable
Get the latest scoop on what’s next from the EHR product team. Learn about new features and planned future improvements.

EHR020  Senior Living Suite Overview
Learn how you can leverage the products in the Senior Living Suite to run all aspects of your business. This session will include a high-level overview of Voyager Senior Housing, EHR, Senior CRM, and RENTCafé Senior Living. The review will include a discussion of the ROI that can be realized based on sharing information seamlessly between the resident care, sales and marketing, and business office teams.

EHR100  EHR: New Features
Attend this course to review several key enhancements and new features added to the Yardi EHR product this past year.
EHR170  ★
Strategies for EHR Adoption & Tips for Training EHR Staff ★
Moving to electronic record keeping has a lot of advantages over manual record keeping. However, implementing an EHR can be disruptive to habits and routines of staff in the community. Based on years of firsthand experience, this course focuses on strategies to help overcome these challenges. Training is a key component that will be discussed in addition to tips that will ensure a successful EHR rollout.

EHR180  ★
Home Health Overview ★
Yardi’s at-home care module includes tools needed to effectively perform assessments and chart home care, as well as a scheduling component that provides the ability to both schedule and track home health caregivers. In this course, we’ll provide an overview of this functionality and provide an update on our roadmap for future product development.

EHR245  ★★★
EHR Care Stream Navigation & Charting Enhancements ★★★
With an understanding that every senior living community needs to streamline operations while maintaining a high level of care for residents, we embarked on an effort to improve EHR Care Stream. Join this class to explore the resulting improvements in overall navigation and enhancements to the charting process, as well as a discussion on how these changes can be deployed in your communities.

EHR250  ★★★
EHR Assessment App & EHR Care Stream App: Overview ★★★
This session provides an overview of the EHR Assessment and EHR Care Stream apps. We’ll review the functionality of each app and discuss how each of them can help your clinical staff manage the assessment process as well as providing resident care.

EHR255  ★★★
Assessment Setup & Management ★★★
Improve your understanding of assessment configuration and ensure you’re maximizing your usage of the Assessment and Service Plan modules. This session will review the steps to configure and modify assessments, link to care plan items and default schedules, and use points to determine care level billing. The session will also include discussion of the versioning process as an assessment’s configuration is modified over time.

EHR260  ★★★
Assessment Workflow & Enhancements ★★★
Assessments are a powerful tool that document a resident’s condition, drive care plans, and determine care-level billing recommendations. Attend this course to understand how these different components interact and work together to bring efficiency and accuracy to the creation of care plans and care-level billing.

EHR290  ★★★
Skin & Wound Tracking Overview ★★★
The Skin and Wound module was significantly enhanced and now captures more detail than ever. We’ll step you through the changes and discuss how the updated functionality helps you to provide better care for residents.

EHR310  ★★★
EHR: Incident Reporting ★★★
Get to know the configurable incident reporting tool for tracking resident, staff, and community incidents. This course will provide a general overview of incident reporting with a focus on recent enhancements.

EHR320  ★★★
EHR Best Practices: Interfaced eMAR ★★★
Interfacing eMAR with pharmacy providers delivers a higher degree of automation compared to manually-entered orders. With this integration, there are day-to-day practices that the community can adopt that will maximize the advantages of the interface. This course will cover the recommended best practices that ensure you get the highest value from an interfaced eMAR.

EHR330  ★★★
Best Practices: Converting from Voyager Care Module to EHR ★★★
The process of converting from the legacy Care module to EHR is a fairly simple process. However, for the best possible transition, there are steps that should be followed that ensure the migration is as smooth as possible. Having completed many conversions to date, we will share insights and tips that will help you to plan and manage your conversion from the Care module to EHR.
SENIOR SALES & MARKETING

VSL010 Senior CRM Roadmap
Get the latest scoop on what’s next from the senior living development team. Learn about new features and planned future improvements to our CRM and RENTCafé products.

VSL020 RENTCafé Senior Living New Features & Roadmap
Learn about new features that have been added to our expanding resident and family portal. Hear the plans for our roadmap and share your feedback. This class is recommended for new as well as existing RENTCafé Senior Living clients.

VSL120 RENTCafé Senior Living
Learn about the exciting features of RENTCafé Senior Living, including resident and family portals complete with online payment functionality and secure access to resident health records. This class is recommended for new RENTCafé Senior Living clients.

VSL150 Senior CRM: Pipeline Management
Learn how to leverage the workflows and features in Senior CRM to manage your prospect pipeline, forecast and improve occupancy, and maximize sales counselor efficiency.

VSL160 Senior CRM: Reporting
Take an in-depth look at the reporting capabilities in Senior CRM, including tools such as dashboard widgets and YSR reporting.

VSL205 RENTCafé Senior Living: Beyond the Basics
RENTCafé Senior Living contains tools and features that are part of any basic RENTCafé configuration. However, there are a number of senior living-specific features that can be leveraged to extend the product well beyond the basics, help provided enhanced efficiency, and provide a more robust user experience. We’ll step through many of the advanced features so you understand what’s available to help take your RENTCafé Senior Living environment to the next level.

VSL215 Senior CRM & RENTCafé Senior Living: App Overview
Yardi apps are free downloads that provide access to your systems and are designed to assist with role-based activities. The Senior CRM app contains real-time data including: prospect information, alerts, notifications, queue data, summary community data, and more. The RENTCafé Senior Living app provides the resident or authorized payers the ability to set up banking information and make payments, in addition to other useful features. Join us to find out how the Senior CRM app can help with prospect management and the RENTCafé Senior Living app can help residents and payers with rent payments.

VSL220 Senior CRM Best Practices: Setup & Administration
Learn how to configure your Senior CRM system to conform to your business practices and maximize efficiency for your staff.

VSL250 Senior CRM: Leasing Workflow
In this class we’ll review the Senior CRM leasing workflow functionality. This integrated process enables leasing a resident from Senior CRM by following a series of defined steps that include key data from the Senior Housing and EHR products. The session will cover electronic lease approvals and digital signatures.

VSL255 Senior CRM Leasing Workflow Setup & Configuration
Configurable leasing workflow is a tool that helps step the user through the lease-up process. Users are able to make and track proposals, identify one-time charges and charges based on care level, track concessions, generate leases with electronic signatures, move residents in, and more. This course will review the setup and configuration that enables the powerful tools available in leasing workflow. Attend this session to ensure your communities are taking full advantage of all that leasing workflow can do.

VSL330 Senior CRM Listing Analytics
Senior CRM listing analytics is a powerful tool that can be leveraged to easily and quickly create custom reports. Join us for an overview of this feature and a discussion of the ways these reports can be leveraged within the system once they are created.
Cross-Market

ACCOUNTING

AC040  Financial Roundtable
This course will be a client-led discussion of financial topics with a focus on finding solutions to current issues. Staff from the Yardi multifamily, affordable housing, and PHA teams will be available to guide the discussion, take notes, and present information on issues and related software developments.

AC050  Financial Reporting Overview
Take a closer look at Voyager’s financial reporting options! After a brief presentation of each tool, we will open the course to a question-and-answer session geared towards helping users streamline financial reporting.

AC131  Voyager Bank Reconciliation
Learn how Voyager helps make the bank reconciliation process a snap! This course will cover bank account setup, bank reconciliation features, processes, reports, and troubleshooting.

AC210  Account Trees: Introduction
Account trees are powerful financial reporting tools that enable you to determine the format and description of your GL accounts at run time. Discover how this feature can save you time by streamlining and customizing your report-writing processes.

AC237  Month-End Tie-Outs: AR, AP, & Security Deposits
Month-end can be a hectic time for accounting. In this class, learn some useful tips and troubleshooting tools to help complete month-end tasks easily, smoothly, and without hassle!

AC241  Voyager 7S Intercompany
Learn about newly-available intercompany functionality on Voyager 7S. These features track each relationship with a segment. The course will cover how to set up Voyager 7S-style intercompany, how to create intercompany transactions with this setup, and intercompany reporting. It is recommended that you have a basic understanding of segments before taking this class.

AC310  Financial Best Practices in Voyager
Accounting features built into your Voyager software are designed to optimize user efficiency and accuracy with financial reports. Join this course to learn about this and other topics such as general ledger account setup, month-end procedures, charge code definitions, and transaction processing. Learn how to apply accounting best practices to your Voyager system. (Two-part session).

eLEARNING

eL040  eLearning: Introduction
Find out how eLearning can improve your training program by bringing together fully-customizable Yardi software training with critical industry-specific topics, from fair housing compliance and safety courses to preventing sexual harassment and diversity training. Yardi’s 5-in-1 tool combines the accountability, reporting, and efficiencies of a learning management system with a complete authoring tool set, graphics editor, file storage center, and event and webinar management system. Connect your university with HR systems and additional programs to fully automate your training for all onboarding and continued education. Deepen knowledge, save time, reduce errors, and improve training efficiency with eLearning.
Rapid Content Creation in eLearning
Maximize your training ROI by fully utilizing our eLearning solution. Discover how easy it is to quickly develop custom courses and modify courses from Yardi’s catalog to meet your training initiatives. In this one-hour authoring challenge, we will take an internal policy document and turn it into an eLearning course that features engaging student interactions, a full procedural tutorial, quiz questions, and a final exam, all in a clean, modern look.

Reclaiming your Work Day by Automating eLearning
Gain valuable time in your day by automating training administration tasks in eLearning. Set up integrations with your HR system to automatically create and manage all of your user accounts, and leverage SSO to avoid the need for another set of usernames and passwords. Use the Groups functionality to automate the deployment of comprehensive learning plans that deploy new courses to your learners as they progress through the training program. Keep track of learning progress using automated notifications and scheduled reports. All of these time-saving tools will help streamline administrative processing, freeing you up for other tasks.

Power Tools for Customizing Yardi eLearning Courses
Learn how to customize Yardi-authored courses to maximize the effectiveness of your training. Tailor the content and visuals to represent your company’s environments and add necessary reminders or remove extraneous information to promote adherence to your policies and procedures. We’ll walk through the best practices of duplicating a course and creating quick and meaningful changes, keeping track of your work using release and author notes. We’ll also look at how to manage course revisions in the future.

Residential Budgeting & Forecasting
Learn how to accurately and efficiently populate budget worksheets with projected values based on various sources, including historical GL or budget data, future-scheduled rent posting, recurring payables and journal entries, and market leasing assumptions. Course topics include re-forecasts, variance analyses, and analytic reporting during the budget period.

Maintenance: Work Order Overview
This course covers how to use Voyager work orders to manage your day-to-day service requests, maintenance tasks, staff, and materials. We will review work order analytics, various dashboards, and the assignment-to-completion process of a work order.

ScreeningWorks Pro: Introduction
Attend this course to learn the basics of ScreeningWorks PRO (Resident Screening in Canada). Learn about the services we offer, our scoring model, and our approach to screening. We will also demonstrate our seamless integration to your Voyager platform and what is involved with implementing the system. The course also provides a comprehensive overview of the features, customization, and analytics that are available.

CHECKscan
This course covers the basic features of CHECKscan, including bank relationship setup, check scanning, and payer association. It will also cover the basics of daily routines, including checking the collect dashboard for any NSF and returned items, and the collect processor report for the daily transmission of funds.
Recurring Payments

This course will focus on Payment Manager, our recurring payment system. We will cover the various setup options available and how payers can be signed up for recurring payments in Voyager. We will demonstrate the monthly recurring process, reports, and best practices for using automated recurring payments.

Payment Processing Best Practices

This course will cover CHECKscan, ACH, payer-based fees, and credit card best practices, and will review built-in features that optimize user efficiency and accuracy. Join us to learn about best practices for bank reconciliation, administrative functions, funds reporting, and other topics related to processing payments.

PAYscan Round Robin

Procure to Pay delivers consistent policies, eliminates paper invoices, and provides visibility and control over your AP processes. This course is split into three high-level, back-to-back presentations that provide an overview of the components that make up Procure to Pay. Part one covers PAYscan, which supports paperless AP and invoice approval workflows. Part two discusses Marketplace, a catalog shopping and procurement environment featuring national partners such as The Home Depot, Grainger, Staples, and others. Customizable shopping lists and electronic invoice delivery is built into this solution. Part three covers VENDORCafé, a portal application supporting invoicing, W-9s, COIs, and other documents for vendor on-boarding and compliance. It facilitates vendor self-service, allowing your providers to upload invoices and inquire about payment status.

PAYscan Basics

PAYscan delivers consistent AP policies, eliminates the physical movement of paper, and facilitates electronic invoicing. View the full transaction lifecycle, from converting your paper invoices into electronic invoices, to approval and posting. Learn how to track, review, and process your invoices using PAYscan dashboards and the PAYscan mobile app.

PAYscan Performance Metrics & Operations Analysis

With over seven years of product history and over 1,500 clients, the PAYscan AP database contains a wealth of industry information. We have mined this data, analyzed summary statistics, and are ready to share the results with our users. How many invoice approval workflows does a typical organization employ? How long does it take to approve an invoice? How many individuals must review an invoice before it is approved for payment? To what extent are purchase orders used? Can speed and accuracy go together (the answer is YES by the way)? See how you stack up against your peers and how to improve your company’s operational performance.

PAYscan Tip & Tricks

If you are a PAYscan administrator, attend this session to learn tips and tricks to increase your AP department’s efficiency. We will cover shortcuts to move items through approval workflows more quickly, accomplish tasks with fewer mouse clicks, and set up the configurations that will help the program better anticipate your users’ choices.

Yardi Spreadsheet Reporting Overview

Yardi Spreadsheet Reporting (YSR) enables advanced report designers to create report packets in Voyager of individual documents designed in Microsoft Excel or Word. This class will offer an overview of the capabilities of this product, and is designed to help you gain an understanding of how YSR can be used to create boardroom-quality reports.

Basics of Database Schema & SQL

Do you want to learn more about SQL queries and the Yardi database structure but don’t know where to begin? This course will introduce you to the relevant database tables and educate you about the basics of SQL select statements. This knowledge is also helpful for database maintenance and troubleshooting database-related issues.
RE170  Custom Financial Analytics: Introduction
This course is an introduction to Yardi’s custom analytics and provides information on how to create your own financial analytic-type custom financials. Learn how to create account tree and property comparison templates using either standard or custom account trees. We will cover topics such as how to compare financial data from prior periods to the current period and how to compare similar data across multiple properties.

RE250  Using YSR for Custom Financial Analytics
Leverage the power of YSR and Microsoft Excel to transform custom analytics into boardroom-ready financial reports. This class will teach you how to turn reports created using the custom analytic engine into Yardi’s most exciting reporting technology, YSR.

TE020  Introduction to YardiOne
Ever wish you didn’t have to enter your credentials each time you accessed a Yardi program? Do you wish there was a way to easily access all your Yardi applications in once place? If you answered yes, then YardiOne is for you! In this class, we will cover what YardiOne is, how to set it up for Voyager 7S, and what the user experience is like. If you’re a system administrator, or if you are interested in learning more about YardiOne, join us to learn about this new and exciting feature!

TE170  Client Central Essentials
Client Central is our most useful resource for clients to access training and technical information. Learn how to access our extensive online resources, including product documentation and training videos. Find out how to create and monitor Yardi support cases and trouble requests (TRs), and manage your licensing. We’ll also discuss how to administer your Client Central groups, users, and permissions.

TE180  User-Defined Fields & Custom Tables in Voyager 7S
Voyager users have many ways to customize information collected in the program and personalize how it appears on the screen. Join us to learn how to enable user-defined fields for storing additional data, as well as how to create custom tables to control the formatting, field requirements, and layout of a screen containing additional data.

TE200  Voyager Menu Security
This course covers how to protect and restrict access to data by dividing your Voyager users into security groups, with each security group having a customizable menu set associated with it. You’ll also learn how to set up individual users, user access, and permissions. The course will conclude with an overview of security analytic reports.

TE240  Report Runner (Conductor.NET)
This course provides an overview of Report Runner, a back-end report server that replaces Yardi Conductor. Using Microsoft .NET functionality, it runs as a Windows service and offers improved performance over previous report-server versions. Learn how to configure, set up, and operate this utility, including server requirements, reports email processing, exporting reports to Excel and PDF files, batch reports processing, and scheduled analytics reporting.

TE245  Automated Tasks & Notifications
Learn how to set up automated email notifications and tasks based on critical dates or defined criteria. You can automate emails to any contact in the system, including tenants, vendors, owners, and employees. This Voyager feature displays assigned tasks on the user’s dashboard calendar and lets you track the completion date for those tasks.

These course descriptions are for informational purposes only and are subject to change at any time.

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