



Interface Basics

VOYAGER SYSTEM JOB AID

Overview

This Voyager System job aid provides you with the steps necessary to perform the various and basic functions within Voyager. There are several processes where which you will encounter the same functionality again and again. This job aid outlines how to execute those functions.

Job Roles

The job roles responsible for completing this job aid includes everyone at AHA who has access to the Voyager system.

Prerequisites

Users of Voyager must have a user ID and password to login to the system.

Voyager Topics

Listed below are the upcoming topics for this job aid.

- Navigation Overview
-

Voyager Navigation Overview
Key Screens (Resident, Family, Landlord)
Required Fields
Searching & Filters
Running Reports
Creating Letters
Creating & Accessing Memos
Creating & Accessing Tickets
Submit Compliance Request
Completing the 50058

Commented [DC1]: (TW) Add section for how to enter in fields? (Like Calendar Dates, etc.?)

Commented [CO2]: Save all screen captures as PNG files and open them in Snagit to recreate the annotations so they are part of the screen image. Current screen captures have been annotated in Word and boxes and arrows don't stay in place when things are moved within the document.

Commented [CO3]: Update this section after all topics are in place

VOYAGER INTERFACE BASICS

Completing the 50065

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Role/Term Name Comparison

The terms below show the comparison between the names of items as they are currently referred to within AHA and the names of the related items within Voyager.

AHA Role Name	Voyager Role Name
Housing Services Administrator	Caseworker
Participant	Applicant, Resident, Tenant
Landlord, Owner, Property Management Company, Public Housing Authority	Vendor
Vendor #	V-Code
PHA (Public Housing Authority)	Vendor
Program	Property
Unit (see below)	Pending Unit
Client ID	T-Code



In the current state process “units” are defined as physical units in which participants live. Within the Voyager system, there are “virtual” units where people live for the sake of recordkeeping.

Example: A participant who ports-out would be in a “virtual” PortMO – Port Move out unit rather than a physical unit that has been given a code.

Navigation Overview

This topic explains navigating Voyager and using the menus, key screens and search capabilities.

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If you do not have access to Voyager or your access role is incorrect, submit a Footprint.

Login Screen

Access Voyager from your desktop or Internet Explorer Favorites. The login screen displays for you to enter your User Name and Password. Once you click the Submit button. The Home screen displays.



Yardi Voyager UAT 1

Admin Information

Please enter your username, password, and platform.

For information regarding your login data, please contact your system administrator.
[Server Team](#)

Smoke Test is Located [Here](#)

Login Information Voyager

User Name

Password

Database UAT_Conversion ▾

AHA
Atlanta Housing Authority

Home Screen

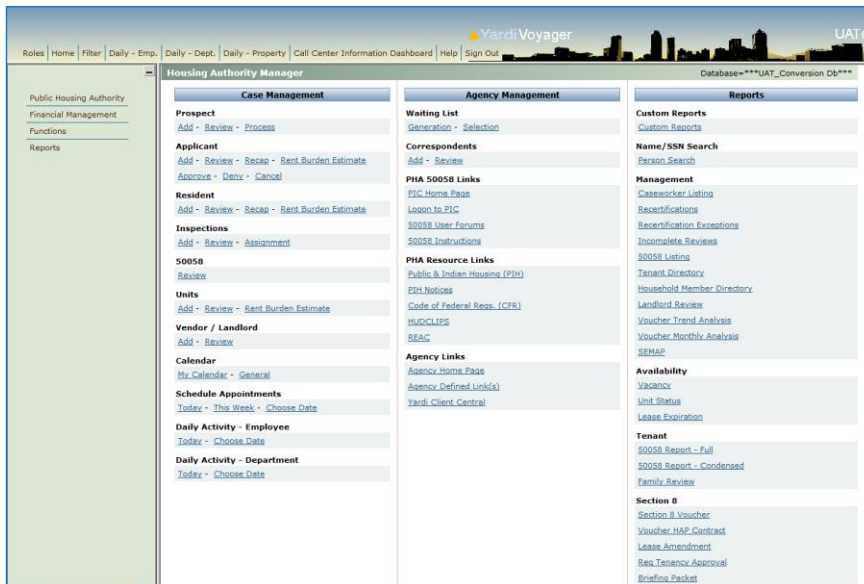
The Home screen contains three types of menus. User view and access of the menus are based on assigned roles and responsibilities. The screen displayed below highlights the Side Menu, the Top Menu and the Quick Menu.

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Home Screen Information

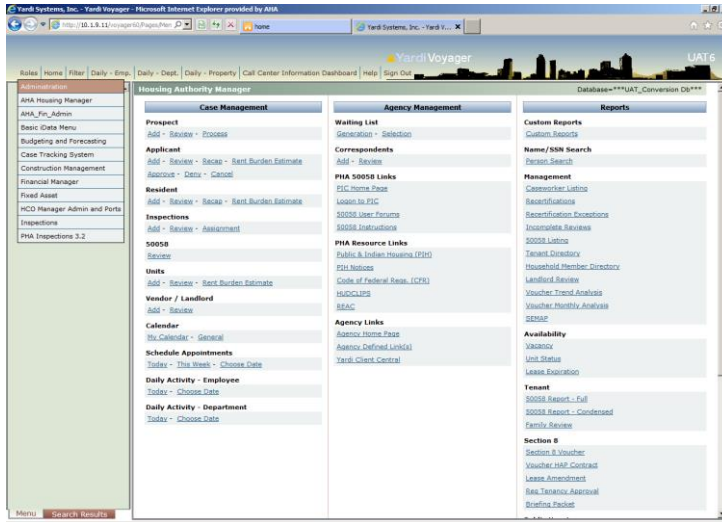
Information, selections and the “Roles” listing that display on the Home screen will be specific to assigned user roles in the system. The example displayed below shows a Home screen for a Super user and the list of Roles that displays for a Super User.

Super User Home Screen



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Super User Home Screen Roles



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Home Screen Menus

The Home screen contains three areas for accessing other functions in the Voyager system. Information on some of these menus may change depending where you are in the system. The screen displayed below highlights the three different menus: Top Menu, Side Menu, and Quick Menu.



Top Menu

Use the Top menu (skyline) to move quickly to basic areas of Voyager.



Be sure to click "Sign Out" on the top menu rather than closing the browser.

Options available in the Top menu are listed below.

Roles – displays the one role or multiple roles you have been assigned in Voyager

Home – Return to the Home screen or a previous screen with clickable links depending on the function and where you are in the system.

Filter – not currently in use

Daily – Emp. – View the scheduled activity for an employee for the current day or any future date.

Daily – Dept. – View the scheduled activity for a department for the current day or any future date.

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Daily – Property – View the scheduled activity for a property for the current day or any future date.

Sign Out – Exit the Voyager system.

Side Menu

The Side menu displays on the left side of the Home screen. You can select many of the Voyager functions by clicking the menu option(s) that will lead you to that function. Selecting one of the option in the Side menu may display additional menus and selections.

Options available in the Side menu are listed below.

Public Housing Authority – Contains many of the administrative functions within Voyager

Financial Management – Contains financial functions. These functions are mostly carried out by the Finance department.

Functions – Contains many day-to-day functions within Voyager

Reports – Contains many of the reports created within Voyager

You can either elect a function or a menu. Examples and the difference between functions and menus are described below.

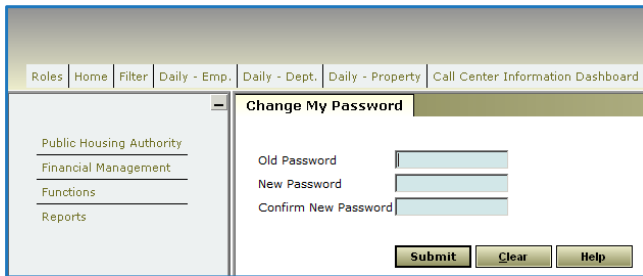
Functions do not display the right arrow symbol. When you click a function, Voyager displays the screen for that function.

Menus do display the right arrow (▶) symbol. When you click a menu, Voyager displays additional options for that menu.

Function Example

If you select Public Housing Authority and then Change Password, the Change Password screen displays.

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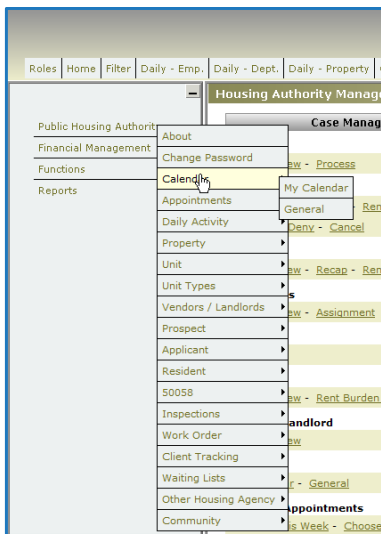


The screenshot displays the Voyager interface. At the top, there is a navigation bar with tabs: Roles, Home, Filter, Daily - Emp., Daily - Dept., Daily - Property, and Call Center Information Dashboard. Below this is a sidebar menu with the following items: Public Housing Authority, Financial Management, Functions, and Reports. The main content area is titled "Change My Password" and contains three input fields: "Old Password", "New Password", and "Confirm New Password". At the bottom of the form are three buttons: "Submit", "Clear", and "Help".

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Menu Example

If you select Public Housing Authority and then Calendar, the Calendar menu displays a list of additional options.



Quick Menu

The Quick menu provides an easy way to work on the tasks that you perform most often. Menu items are organized in sections that are organized by task type. Each menu item is underlined and provides a link to the actual task.

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Navigation Choices

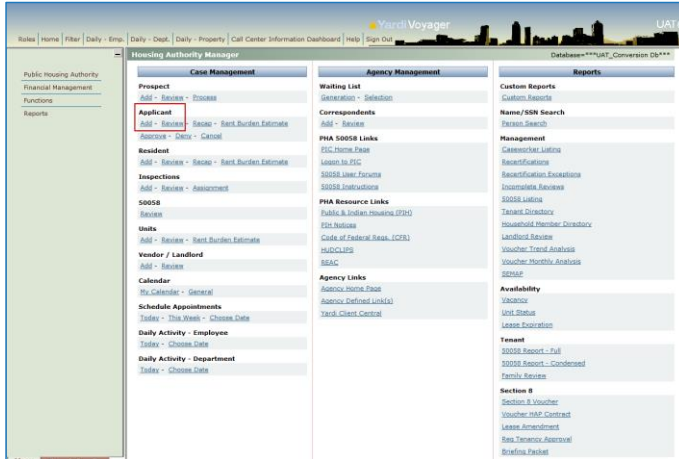
Access to many functions can be located in more than location on the Home screen. For example, you can choose to use the side menu to select Add/Review and Applicant or you can go to the Case Management section and select the Add or Review Link under Application. See the example screens displayed. Below.

Add/Review Applicant Using the Side Menu



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Add/Review Application Using the Case Management Section



Key Screens and Required Fields

This topic highlights several of the screens that will be accessed and used regularly by many users.

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Family Info Screen

Family Info

Property: wait Tenant: 15136 Caseworker:

Unit: PENDING HoH Name: RICHARDS, TA... Program (1c.):

Owner: HoH SSN: 253-25-1547 Legal: N/A

Last Action: Current Action: 1-New FSS Caseworker:

Last Action Eff.: Effective Date: 09/09/2013

Functions

[Clear All Verifications](#)

[Issue Offer](#)

[Update Vo/RFTA Status](#)

Summary	General	Admission	Special Programs	Delinquency	
# Family Members	1	# of Dependents	0	Medical Threshold	0.00
Asset Cash Value	0.00	Asset Income	0.00	Elderly/Disabled Allowance	0.00
Annual Income	0.00	Excluded Income	0.00	Dependent Allowance	0.00
Disability Expense	0.00	Excluded Disability	0.00	Estimated TTP	125.00
Medical Expense	0.00	Excluded Medical	0.00	30% of AMI for HCV Max ...	0.00
Child Care Expense	0.00	Excluded Childcare	0.00	Tenant Rent	
FSS Page	Not Attached	FSS Escrow Balance		Housing Assistance Payment	
Family Verifications	0	Outstanding Verifications	0		
Community Service	Not Applica...	Comm Serv Last reviewed	Not Applica...		
Public Housing	Select a Pr...	EID Status	Not Used		

Data

[Attachment](#)

[Contact](#)

[Memo](#)

[Unit PHA Program Info](#)

[Inspection](#)

[Referral Tracking](#)

Reports

[Third Party Pymts](#)

[Calc Summary](#)

[Lease Amendment](#)

[Reg. Tenancy Approval](#)

[Briefing Packet](#)

[Utility Chart](#)

[Review Memos](#)

[Resident Subsidy Schedule](#)

Commented [CO4]: Insert a sample screen under each of these topics; add an intro sentence before each image.

Applicant Screen

Vendor Screen

Review Inspection

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Memo Screens

Case Screen

This area of Voyager can be used to communicate Participant or Landlord issues to other groups when a face-to-face conversation or phone call is not possible. There are several case types to choose from and this screen will change depending on this selection. The example displayed below is a Case screen for Applicant/Tenant. Listed below are the required fields.

•

The screenshot shows the 'Case Screen' interface in the Voyager system. The top navigation bar includes 'Roles', 'Home', 'Filter', 'Case Tracking System', 'Help', and 'Sign Out'. The main content area is divided into several sections:

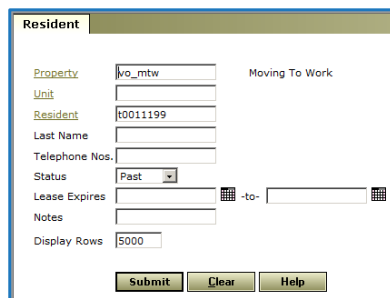
- Case ID:** A text input field.
- Applicant/Tenant:** A dropdown menu.
- Requestor Name:** A text input field.
- Brief Description:** A large text area with a scroll bar.
- Category:** A dropdown menu.
- Subcategory:** A dropdown menu.
- Case Type:** A dropdown menu.
- Source:** A dropdown menu.
- Priority:** A dropdown menu.
- Email Cc:** A text input field with a note: '(Multiple email addresses must be separated by comma and no spaces between)'. Below this field are 'Save' and 'Help' buttons.
- Assigned To:** A dropdown menu.
- Assigned To Queue:** A dropdown menu.
- Due Date:** A date input field.
- Status:** A dropdown menu.
- Status Date:** A date input field.
- Created By:** A dropdown menu.
- Created Date:** A date input field.
- Last Updated By:** A dropdown menu.
- Last Updated Date:** A date input field.
- Functions:** A button.
- Reports:** A button.

The left sidebar contains 'Case Tracking System' and 'Reports'. The bottom of the page has a 'Menu' and 'Search Results' section.

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Data Search and Filters

When you open a search screen the value(s) from a previous search may display. In the xample displayed below the **Property** and **Resident** fields are pre-populated. When this occurs, you may want to click the Clear button to remove data that displays.



The screenshot shows a search form titled "Resident". The fields are as follows:

- Property: jvo_mtw (with "Moving To Work" text to the right)
- Unit: (empty)
- Resident: t0011199
- Last Name: (empty)
- Telephone Nos.: (empty)
- Status: Past (dropdown menu)
- Lease Expires: (calendar icon) -to- (calendar icon)
- Notes: (empty)
- Display Rows: 5000

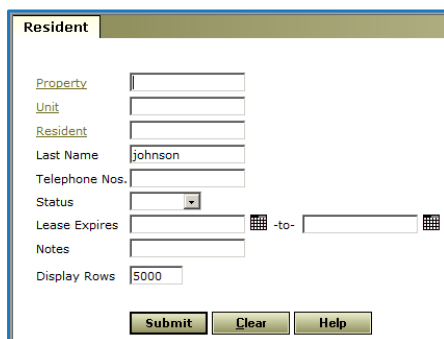
Buttons at the bottom: Submit, Clear, Help.

In this case, click Clear to clear the search fields and start a brand new search.

Entering multiple fields filters the results to a smaller, more manageable group. After defining the search terms, click Submit to see the results.

Search Example

This example is a Resident search based on the Last Name of "Johnson".



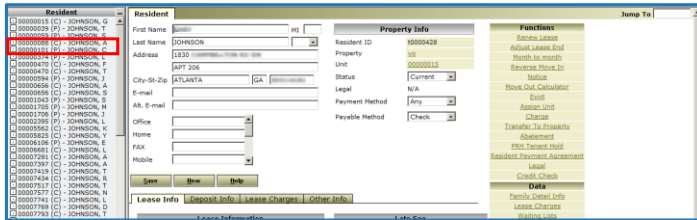
The screenshot shows the same search form as above, but with the following changes:

- Property: (empty)
- Unit: (empty)
- Resident: (empty)
- Last Name: Johnson
- Telephone Nos.: (empty)
- Status: (dropdown menu)
- Lease Expires: (calendar icon) -to- (calendar icon)
- Notes: (empty)
- Display Rows: 5000

Buttons at the bottom: Submit, Clear, Help.

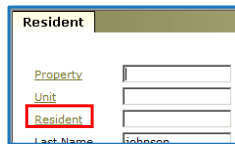
After clicking Submit, the results of the search display. In this example, all people with the last name "Johnson" display in the search results listing on the left side. Also, the record of the first person on the list displays.

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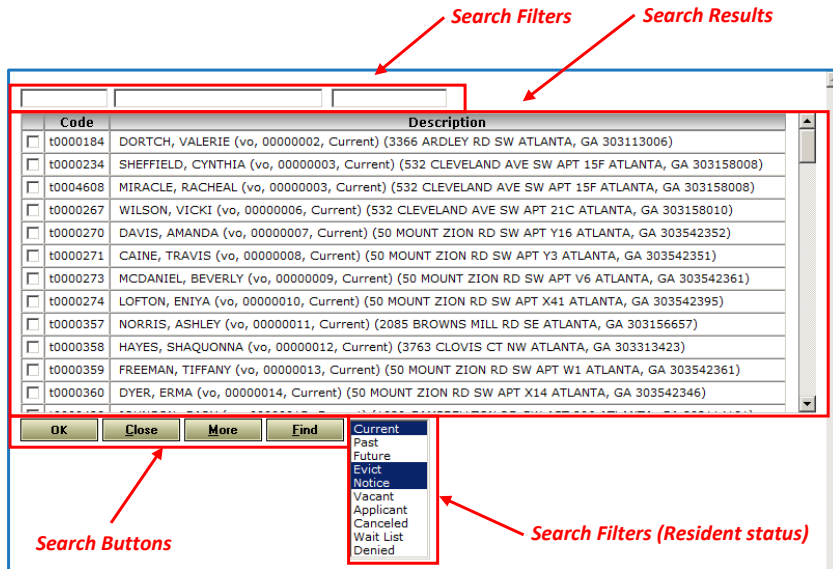


Sometimes, it may be necessary to search the value of a field because that may be a code that is not easily known or memorized.

To do such a search, click the link for that value. The filter pop-up window for that link displays.

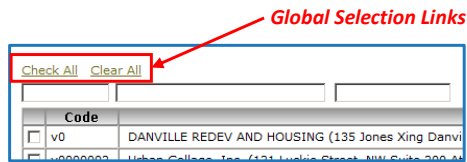


For example, to search for a specific Resident within the Resident search screen, click the Resident link. The results are the following:



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In addition, some filter pop-up windows have Global Selection links. (the Check All and Clear All buttons shown below)



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Listed below are the description of each section of a filter pop-up window:

- **Global Selection Links** – The top of many filter pop-up windows have two links which allow you to select or deselect every option from the list.
- **Search Filters** – Below the Global Selection Links (if they exist) are three search boxes where you can enter the search terms to filter the options of a search to a more manageable list.
- **Search Results** – The middle of the filter pop-up window contains the list of options for a search. For each option, the Search Results area has a checkbox, the code, and a description.
- **Search Buttons** – The bottom of the filter pop-up window has buttons that you can click to execute a search.

Note: In a filter pop-up window, you must click Find to get a list of results. Do not press Enter. If you press Enter, the filter pop-up window is closed and no results display in the field where you used search.



Global Selection Links

The top of the filter pop-up window may have two links at the top which say **CHECK ALL** and **CLEAR ALL**.

Check All selects every item on the list

Clear All clears every checkbox on the list

Note: Whether these links exist or not depends on if you are allowed to select more than one item from the search screen.

Code	
<input type="checkbox"/>	v0 DANVILLE REDEV AND HOUSING (135 Jones Xing Danvi
<input type="checkbox"/>	v0000003 Urban College, Inc. (121 Ludlow Street, NW Suite 200 A

Note: To select multiple options (but not all options), click the checkbox so the checkmark displays for that option.

Commented [CO5]: Change this to the information table with the icon and icon text.

Commented [CO6]: Same as CO7

Commented [CO7]: Same as CO7

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Search Filters

There are three blank entry fields right below the Check All and Clear All links. These fields allow you to narrow the search results to a smaller list.

Code	Description
<input type="checkbox"/> t0000184	DORTCH, VALERIE (vo, 00000002, Current) (3366 ARDLEY RD SW ATLANTA, GA 303113006)
<input type="checkbox"/> t0000234	SHEFFIELD, CYNTHIA (vo, 00000003, Current) (532 CLEVELAND AVE SW APT 15F ATLANTA, GA 303158008)
<input type="checkbox"/> t0004608	MIRACLE, RACHEAL (vo, 00000003, Current) (532 CLEVELAND AVE SW APT 15F ATLANTA, GA 303158008)
<input type="checkbox"/> t0000262	WILSON, VICKI (vo, 00000006, Current) (532 CLEVELAND AVE SW APT 21C ATLANTA, GA 303158016)

Use any or all of these fields for a search:

- **Code** – In this field, enter the code for the person, company, or agency for which you are searching. (Example: "t0005428", "v0000137")
- **Name** – In this field, enter all or any part of the name of the person, company, or agency you are searching for. (Example: "Smith", "John Smith", "Furnishings", "Housing Authority", "Marietta")
- **Address** – In this field, enter all or any part of the address of the person, company, or agency for which you are searching. (Example: "Main St", "30060", "Marietta")
- **Status** – (Resident screen) Within the Resident filter pop-up window, select the status of that Resident.

Search Results

The search results are in the middle of the screen. When you enter the search parameters in the search filters and click Find, a list of all items matching the search criteria display. This yields a small, more manageable list of choices from which to choose.

Search Buttons

The bottom of the filter pop-up window has the four buttons shown below.

<input type="checkbox"/> v0000012	JAMES STEWART-203775 (3965 OLD F...
<input type="checkbox"/> v0000013	CARRIE JOHNSON-203775 (3965 OLD F...

Clicking the buttons within the filter pop-up window accomplishes the following:

- **OK** – When you have selected the desired item(s) by selecting the checkboxes for those items, click OK to return to the previous window.

Commented [D8]: (TW) Add some text about how this option shows up in the field.

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- Close – When you are finished searching, click Close to close the general search window.
- More – Opens the window to display more information.
- Find – When you have entered the desired search parameters within the blank entry fields, click Find to yield the filtered search results.

Commented [D9]: (TW) What's the result of this?

Commented [D10]: (TW) What does this mean?

Key Data Screens

There are four screens that are considered key screens within Voyager:

Resident

Family Detail Information

Unit

Vendor/Landlord

Resident Screen

The Resident screen is the main screen where basic information about the Resident can be viewed, and where links to more detailed information are located.

The Resident screen shows the resident's demographic information, status, and information about that Resident's lease.

The Functions section (on the right side of the Resident screen) contains links to activities (such as assigning a unit, and renewing a lease) that apply to a Resident.

The Data section (below the Functions section) contains links to more information about that Resident.

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Resident		Property Info		Functions																																																													
First Name	SEQUORIA MI	Resident ID	1008715	Renew Lease																																																													
Last Name	JOHNSON	Property	vo_mtw	Adjust Lease End																																																													
Address		Unit	00000656	Month to month																																																													
City-St-Zip	ATLANTA GA 30354	Status	Current	Reverse Move In																																																													
E-mail		Legal	N/A	Notice																																																													
Alt. E-mail		Payment Method	Any	Move Out Calculator																																																													
Office		Payable Method	Check	Evict																																																													
Home				Assign Unit																																																													
FAX				Charge																																																													
Mobile				Transfer To Property																																																													
<input type="button" value="Save"/> <input type="button" value="New"/> <input type="button" value="Help"/>				Abatement																																																													
Lease Info Deposit Info Lease Charges Other Info				PRH Tenant Hold																																																													
<table border="1"> <thead> <tr> <th colspan="2">Lease Information</th> <th colspan="2">Late Fee</th> </tr> </thead> <tbody> <tr> <td>Mkt. Rent</td> <td>0.00</td> <td>Rent</td> <td>0.00</td> <td>Base %</td> <td>0.00</td> <td>% Owed-total</td> </tr> <tr> <td>Due Day</td> <td>1</td> <td>Other Charges</td> <td>0.00</td> <td>Grace Period</td> <td>6</td> <td></td> </tr> <tr> <td>Move In</td> <td>12/01/2008</td> <td>Total Charges</td> <td>0.00</td> <td>2nd %</td> <td>0.00</td> <td>% Owed-total</td> </tr> <tr> <td>Lease Sign</td> <td></td> <td>Notice</td> <td></td> <td>2nd Grace</td> <td>0</td> <td></td> </tr> <tr> <td>Lease From</td> <td>12/01/2008</td> <td>Move Out</td> <td>11/30/2009</td> <td>Max %</td> <td>0.00</td> <td>% Owed-total</td> </tr> <tr> <td>Lease To</td> <td>11/30/2009</td> <td>Lease Desc</td> <td></td> <td>\$/day</td> <td>0.00</td> <td></td> </tr> <tr> <td>Last Renewal</td> <td></td> <td>Responsibility Date</td> <td></td> <td>Max # Days</td> <td>0</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>Minimum Due</td> <td>0.00</td> <td></td> </tr> </tbody> </table>		Lease Information		Late Fee		Mkt. Rent	0.00	Rent	0.00	Base %	0.00	% Owed-total	Due Day	1	Other Charges	0.00	Grace Period	6		Move In	12/01/2008	Total Charges	0.00	2nd %	0.00	% Owed-total	Lease Sign		Notice		2nd Grace	0		Lease From	12/01/2008	Move Out	11/30/2009	Max %	0.00	% Owed-total	Lease To	11/30/2009	Lease Desc		\$/day	0.00		Last Renewal		Responsibility Date		Max # Days	0						Minimum Due	0.00				Resident Payment Agreement	
Lease Information		Late Fee																																																															
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				Data																																																													
				Family Detail Info																																																													
				Lease Charges																																																													
				Waiting Lists																																																													
				Inspection																																																													
				URP Distribution																																																													
				Roommates																																																													
				Attachment																																																													
				Memo (59)																																																													
				Contact																																																													
				Email																																																													
				EFT Setup																																																													
				Credit Card Setup																																																													
				Resident History																																																													
				Manage Rentable Items																																																													
				New WO																																																													
				Billing & Payment																																																													
				MPAC Res. Tenant																																																													
				MPAC Comm. Tenant																																																													
				RTA Charges																																																													

Family Detail Info Window

The Family Detail Info window is a key location of more detailed information about the Resident. Included within this window are:

Basic information about family size, income, subsidy amounts, and portability

Links to more detailed information about topics such as family size, income, subsidy amounts, and portability

The Functions section (There is no Phase 1 usage for this section.)

The Data section (There is no Phase 1 usage for this section.)

The Reports section, which enables viewing of the Portability Payment Schedule, an essential item within portability

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Family Detail Info

Family Info				Functions																																																																																		
Property	vo_mtw	Tenant	1008715	Caseworker																																																																																		
Unit	00000656	HoH Name	SEQUORIA B J...	Program (1c.)	VO-Voucher																																																																																	
Owner	y207500	HoH SSN		Legal	N/A																																																																																	
Last Action		Current Action	3-Interim	FSS Caseworker																																																																																		
Last Action Eff.		Effective Date	06/01/2012																																																																																			
<input type="button" value="Save"/> <input type="button" value="Alerts (403)"/> <input type="button" value="Help"/>				<div style="background-color: #f2f2f2; padding: 2px; border: 1px solid black;">Data</div> <ul style="list-style-type: none"> Attachment Contact Memo (59) Unit PHA Program Info Inspection Referral tracking 																																																																																		
<input type="button" value="Add 58"/> <input type="button" value="Review 58 (1)"/> <input type="button" value="Manage 58s"/>																																																																																						
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Summary</th><th>General</th><th>Admission</th><th>Special Programs</th><th>Delinquency</th></tr> </thead> <tbody> <tr> <td># Family Members</td><td>2</td><td># of Dependents</td><td>1</td><td>Medical Threshold</td><td>0.00</td></tr> <tr> <td>Asset Cash Value</td><td>0.00</td><td>Asset Income</td><td>0.00</td><td>Elderly/Disabled Allowance</td><td>0.00</td></tr> <tr> <td>Annual Income</td><td>13,425.00</td><td>Excluded Income</td><td>0.00</td><td>Dependent Allowance</td><td>750.00</td></tr> <tr> <td>Disability Expense</td><td>0.00</td><td>Excluded Disability</td><td>0.00</td><td>Estimated TTP</td><td>336.00</td></tr> <tr> <td>Medical Expense</td><td>0.00</td><td>Excluded Medical</td><td>0.00</td><td>30% of AMI for HCV Max ...</td><td>317.00</td></tr> <tr> <td>Child Care Expense</td><td>0.00</td><td>Excluded Childcare</td><td>0.00</td><td>Tenant Rent</td><td>336.00</td></tr> <tr> <td>FSS Page</td><td>Not Attached</td><td>FSS Escrow Balance</td><td></td><td>Housing Assistance Payment</td><td>475.00</td></tr> <tr> <td>Family Verifications</td><td>1</td><td>Outstanding Verifications</td><td>0</td><td></td><td></td></tr> <tr> <td>Community Service</td><td>Not Applica...</td><td>Comm Serv Last reviewed</td><td>Not Applica...</td><td></td><td></td></tr> <tr> <td>Voucher</td><td>Attached</td><td>EID Status</td><td>Not Used</td><td></td><td></td></tr> <tr> <td>Work Requirement</td><td>Not Used</td><td></td><td></td><td></td><td></td></tr> <tr> <td>Portability</td><td>Not Used</td><td></td><td></td><td></td><td></td></tr> <tr> <td>Vo/RFTA Tracking</td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table>						Summary	General	Admission	Special Programs	Delinquency	# Family Members	2	# of Dependents	1	Medical Threshold	0.00	Asset Cash Value	0.00	Asset Income	0.00	Elderly/Disabled Allowance	0.00	Annual Income	13,425.00	Excluded Income	0.00	Dependent Allowance	750.00	Disability Expense	0.00	Excluded Disability	0.00	Estimated TTP	336.00	Medical Expense	0.00	Excluded Medical	0.00	30% of AMI for HCV Max ...	317.00	Child Care Expense	0.00	Excluded Childcare	0.00	Tenant Rent	336.00	FSS Page	Not Attached	FSS Escrow Balance		Housing Assistance Payment	475.00	Family Verifications	1	Outstanding Verifications	0			Community Service	Not Applica...	Comm Serv Last reviewed	Not Applica...			Voucher	Attached	EID Status	Not Used			Work Requirement	Not Used					Portability	Not Used					Vo/RFTA Tracking			
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VOYAGER INTERFACE BASICS

Unit Screen

The Unit screen is the main screen where basic information about a unit can be viewed, and where links to more detailed information are located. Included in the Unit screen are:

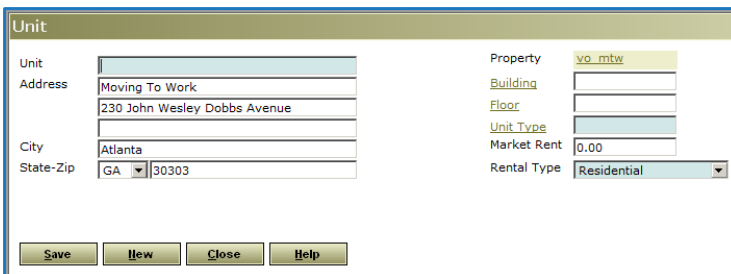
The unit number as stored in Voyager

The address of the unit

The unit's Property

The building ID (for multi-unit buildings)

Other details of the unit such as the type of unit, and the floor (within a multi-story building)



Unit	
Unit	<input type="text"/>
Address	<input type="text" value="Moving To Work"/> <input type="text" value="230 John Wesley Dobbs Avenue"/> <input type="text"/>
City	<input type="text" value="Atlanta"/>
State-Zip	<input type="text" value="GA"/> <input type="text" value="30303"/>
Property	<input type="text" value="vo_mtw"/>
Building	<input type="text"/>
Floor	<input type="text"/>
Unit Type	<input type="text"/>
Market Rent	<input type="text" value="0.00"/>
Rental Type	<input type="text" value="Residential"/>

VOYAGER INTERFACE BASICS

Vendor/Landlord Screen

The Vendor screen is the main screen where basic information about a Vendor (such as a landlord) can be viewed, and where links to more detailed information are located. The Vendor screen has:

Location and contact information of the vendor

Details about how to pay the vendor

Links to attach information such as memos, EFT and eligibility information for the vendor

The screenshot shows the 'Vendor' screen with the following sections:

- General Information:** Code (v0000002), Company (Urban Collage, Inc.), Name, Dear, Contact (Stanford R. Harvey), Address (121 Luckie Street, NW, Suite 200), City (Atlanta), State-Zip (GA 30303), E-Mail (sharvey@urbancollage.com), Alt (bbegle@urbancollage.com).
- Telephone:** Office ((404) 586-0277), Home, FAX ((404) 589-0079), Mobile.
- Checks:** Payment Method (EFT), Consolidate (checked), Check Memo From Inv, Hold Payments, PO Required, No Signature, On Checks Over (0.00), Memo.
- Data:** Attachment, Memo, Contact, Email, EFT Setup, Ledger, Commodity Codes, Landlord Foreclosures, Vendor Eligibility, Vendor Setup Tracking, Abatement, Prop List.
- Buttons:** Edit, New, Close, Help.
- General Tab:** Inactive, Employee, Contractor (checked), Language, Usual Account, Require Contract on Payable, URL, Notes.
- Discount:** Percent, Day (30), Days from Invoice (@), Day of the Month (@), Payment Terms (30).
- Insurance Expiration:** Liability, Workers Comp.

VOYAGER INTERFACE BASICS

Key Activities/System Aspects

Required Fields

On any screen within Voyager, required fields are blue. If you do not fill a required field, you will not be able to use the Save or Submit buttons within that screen.

In the example below, the Caseworker and Schedule Date fields are **required**.

Commented [CO11]: Add information table indicating that individual departments may have requirements for other fields.

Alerts and Warnings

The Alerts window illustrates items which have been entered that may cause issues with Voyager functions or calculations.

Clicking the Alerts button in the Family Detail info window displays the alerts for that Resident. An example of the Alerts window is below.

VOYAGER INTERFACE BASICS

Alerts

Alerts for 1008715 for FDI Ctrl # 18397

Property	<input type="text" value="vo_mtw"/>	HoH Name	<input type="text" value="SEQUORIA B JOHNSON"/>	
Unit	<input type="text" value="0000656"/>	HoH SSN	<input type="text" value=""/>	
Tenant	<input type="text" value="1008715"/>	50058 Action Type	<input type="text" value="3-Interim"/>	<input type="button" value="Help"/>
Owner	<input type="text" value="v207500"/>	50058 Effective Date	<input type="text" value="06/01/2012"/>	<input type="button" value="Close"/>

Display Message Types:

All
 Fatal (4)
 Warnings
 Alerts (3)
 Calculated (1)
 Lookups
 Changed Data (2)
 Other

Alert Messages

Message Code	Message	HUD Error Code	HUD Field #	HUD Field Name	How to Fix	Jump To Fix
B-015	An 2-Annual 50058 with a 9/1/2012 12:00:00 AM effective date.		2b			
B-017	Program Settings on Family Detail Info doesn't match the Default Special Program for this property	n/a	n/a	n/a		
VO-12t-005	Total Family Share is greater than % of AMI for Max Rent Burden.		12t			

Helpful columns in the Alerts window are:

Message – Displays the possible issue

HUD Field # – Displays the line number on the HUD form with the issue

HUD Field Name – Displays the field name related to the field number for that issue

How to Fix – Displays an instruction about fixing the issue

Jump to Fix – Displays a link to the screen where the issue can be fixed

VOYAGER INTERFACE BASICS

Common Tasks

Run Report

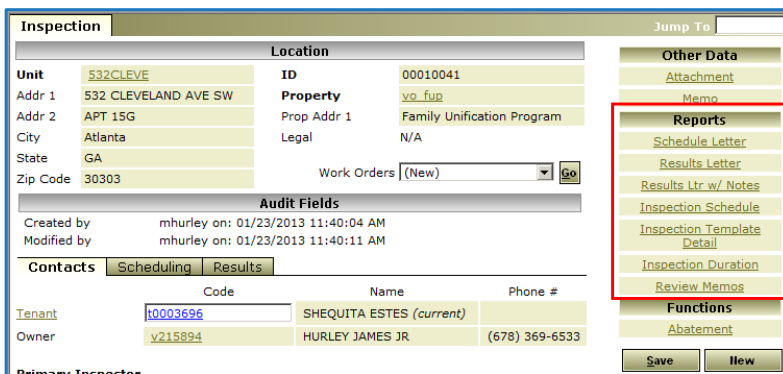
Reports are generated for many different uses. For instance, inspectors run reports to find their inspection assignments, and CSMs run reports for HAP to review and approve monthly payments. Within Voyager, you can run reports from one of two places:

In the Reports section within many individual screens within Voyager, or

From the Reports menu in the Side menu

Run Reports from Individual Screens

Individual Voyager screens may have a Reports section on the right side of that screen. An example is the Inspection screen show below.



The screenshot shows the Voyager Inspection screen. The interface is divided into several sections:

- Location:** Unit: 532CLEVE, ID: 00010041, Addr 1: 532 CLEVELAND AVE SW, Addr 2: APT 15G, City: Atlanta, State: GA, Zip Code: 30303. Property: vo_fup, Prop Addr 1: Family Unification Program, Legal: N/A. Work Orders: (New) [Go]
- Audit Fields:** Created by: mhurley on: 01/23/2013 11:40:04 AM, Modified by: mhurley on: 01/23/2013 11:40:11 AM
- Contacts:**

Code	Name	Phone #
0003696	SHEQUITA ESTES (current)	
v215894	HURLEY JAMES JR	(678) 369-6533
- Other Data:** Attachment, Memo
- Reports (highlighted in red):** Schedule Letter, Results Letter, Results Ltr w/ Notes, Inspection Schedule, Inspection Template Detail, Inspection Duration, Review Memos
- Functions:** Abatement

Buttons: Save, New

To run a report from an individual screen:

1. Click a report link within the Reports section. The report displays.

VOYAGER INTERFACE BASICS

Atlanta HA		Page 1
Inspection Schedule		
Inspector: Unassigned		
Inspection Date/Time		
01/23/13 8:00 am	Inspection Type: Initial	Inspection ID: 10041
	Anticipated Duration: 0 minutes	
	Date Tenant Notified:	Tenant: SHEQUITA ESTES
	Due Date:	Tenant Code: t0003696
	Prop Code: vo_fup	Tenant Phone:
	Unit Code: 532CLEVE	
	Address: 532 CLEVELAND AVE SW	Mail Address: 532 CLEVELAND AVE SW
	APT 15G	APT 15G
	Atlanta, GA 30303	Atlanta, GA 30303
# Bed:	3	

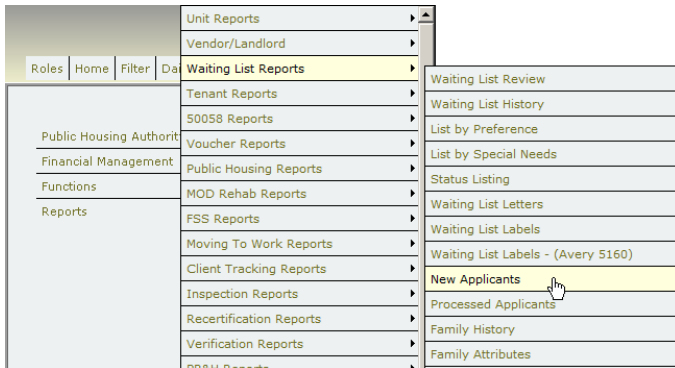
Run Reports from the Side menu

The Side menu has a Reports menu option where you can access many Voyager reports.

Note: There are many types of reports that require you to work through several menus to get to the desired report.

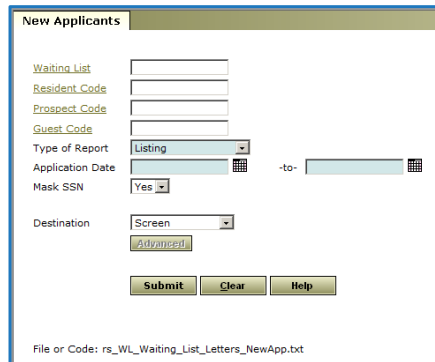
To run a report from the Side menu:

1. In the Side menu, select the menu options for the report to run.



In the following example, Reports > Waiting List Reports > New Applicants was selected. As a result, the New Applicants screen displays.

VOYAGER INTERFACE BASICS



New Applicants

Waiting List

Resident Code

Prospect Code

Guest Code

Type of Report

Application Date -to-

Mask SSN

Destination

File or Code: rs_WL_Waiting_List_Letters_NewApp.txt

Enter the search criteria to filter the New Applicants report. Use the search tips in the “Key Screens and Required Fields

This topic highlights several of the screens that will be accessed and used regularly by many users.

VOYAGER INTERFACE BASICS

Family Info Screen

Family Info

Property: wait Tenant: 15136 Caseworker:

Unit: PENDING HoH Name: RICHARDS, TA... Program (1c.):

Owner: HoH SSN: 253-25-1547 Legal: N/A

Last Action: Current Action: 1-New FSS Caseworker:

Last Action Eff.: Effective Date: 09/09/2013

Functions

[Clear All Verifications](#)

[Issue Offer](#)

[Update Vo/RFTA Status](#)

Summary	General	Admission	Special Programs	Delinquency	
# Family Members	1	# of Dependents	0	Medical Threshold	0.00
Asset Cash Value	0.00	Asset Income	0.00	Elderly/Disabled Allowance	0.00
Annual Income	0.00	Excluded Income	0.00	Dependent Allowance	0.00
Disability Expense	0.00	Excluded Disability	0.00	Estimated TTP	125.00
Medical Expense	0.00	Excluded Medical	0.00	30% of AMI for HCV Max ...	0.00
Child Care Expense	0.00	Excluded Childcare	0.00	Tenant Rent	
FSS Page	Not Attached	FSS Escrow Balance		Housing Assistance Payment	
Family Verifications	0	Outstanding Verifications	0		
Community Service	Not Applica...	Comm Serv Last reviewed	Not Applica...		
Public Housing	Select a Pr...	EID Status	Not Used		

Data

[Attachment](#)

[Contact](#)

[Memo](#)

[Unit PHA Program Info](#)

[Inspection](#)

[Referral Tracking](#)

Reports

[Third Party Pymts](#)

[Calc Summary](#)

[Lease Amendment](#)

[Reg. Tenancy Approval](#)

[Briefing Packet](#)

[Utility Chart](#)

[Review Memos](#)

[Resident Subsidy Schedule](#)

Applicant Screen

Vendor Screen

Review Inspection

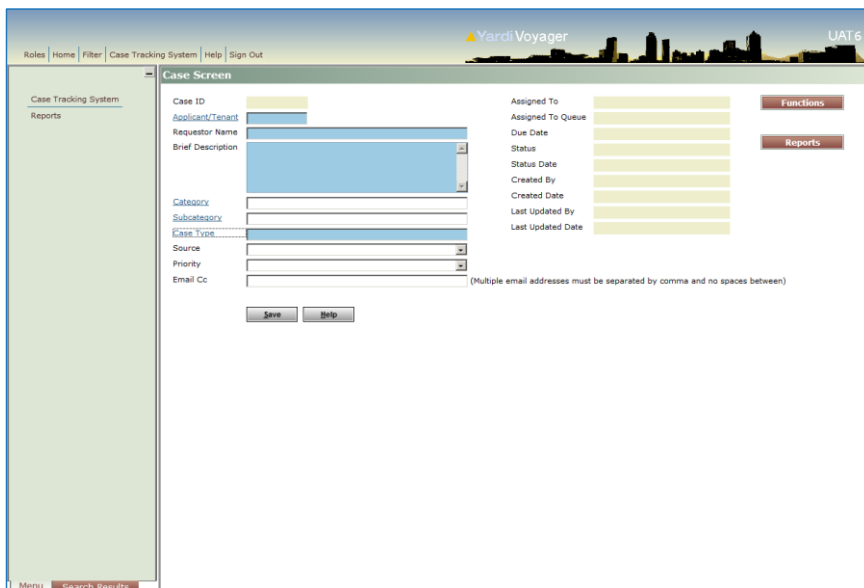
VOYAGER INTERFACE BASICS

Memo Screens

Case Screen

This area of Voyager can be used to communicate Participant or Landlord issues to other groups when a face-to-face conversation or phone call is not possible. There are several case types to choose from and this screen will change depending on this selection. The example displayed below is a Case screen for Applicant/Tenant. Listed below are the required fields.

•



The screenshot shows the 'Case Screen' interface in the Voyager system. The top navigation bar includes 'Roles', 'Home', 'Filter', 'Case Tracking System', 'Help', and 'Sign Out'. The main content area is divided into several sections:

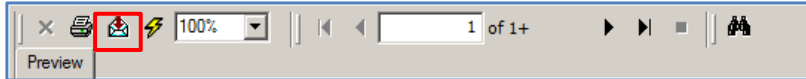
- Case ID:** A text input field.
- Applicant/Tenant:** A dropdown menu.
- Requestor Name:** A text input field.
- Brief Description:** A large text area with a scroll bar.
- Category:** A dropdown menu.
- Subcategory:** A dropdown menu.
- Case Type:** A dropdown menu.
- Source:** A dropdown menu.
- Priority:** A dropdown menu.
- Email Cc:** A text input field with a note: "(Multiple email addresses must be separated by comma and no spaces between)".
- Assigned To:** A dropdown menu.
- Assigned To Queue:** A dropdown menu.
- Due Date:** A date input field.
- Status:** A dropdown menu.
- Status Date:** A date input field.
- Created By:** A dropdown menu.
- Created Date:** A date input field.
- Last Updated By:** A dropdown menu.
- Last Updated Date:** A date input field.

On the right side, there are two buttons: 'Functions' and 'Reports'. At the bottom of the form, there are 'Save' and 'Help' buttons. The left sidebar shows 'Case Tracking System' and 'Reports'.

Data Search and Filters" section on page 12.

VOYAGER INTERFACE BASICS

Export a Report to Excel



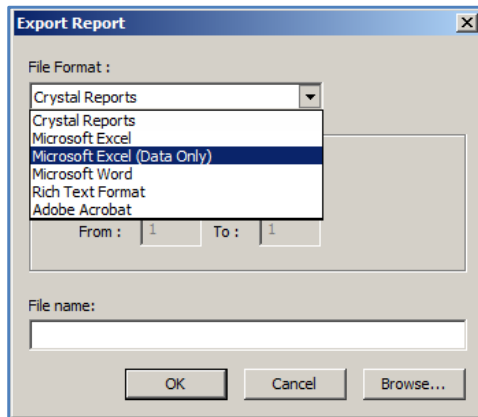
To export reports to Excel®:

1. Click the envelope on the top bar. The Export Report window displays.

1. In the Export Report window, enter or select:

File Format – “Microsoft Excel (Data Only)”

File name – Enter the complete path and file name and click OK or Browse to the correct location, enter the file name and click SAVE.



2. Click OK. A message displays allowing the file to be opened after it generates.

VOYAGER INTERFACE BASICS

Create Memos

To create a memo:

1. In the Data section, click the Memo link.

The screenshot shows the Voyager interface with the following sections:

- Resident List:** A scrollable list of residents with checkboxes and names like "00000002 (P) - SMITH, EFFI", "00000029 (P) - SMITH, EFFI", etc.
- Resident Info:** Fields for First Name (JEWEL), Last Name (SMITH), Address (4196 BAKERS FERRY RD SW), City-St-Zip (ATLANTA GA 30331-3902), E-mail, Alt. E-mail, Office, Home, FAX, and Mobile.
- Property Info:** Fields for Resident ID (I0007362), Property (vo_norntw), Unit (13273), Status (Current), Legal (N/A), Payment Method (Any), and Payable Method (Check).
- Lease Info:** A sub-section with tabs for Lease Information and Late Fee. It includes fields for Mkt. Rent (0.00), Due Day (1), Move In (02/03/2012), Lease Sign (Notice), Lease From (02/03/2012), Lease To (01/31/2013), and Last Renewal.
- Functions:** A sidebar menu with various options like "Renew Lease", "Adjust Lease End", "Month to month", "Reverse Move In", "Notice", "Move Out Calculator", "Evict", "Assign Unit", "Charge", "Transfer To Property", "Abatement", "PRN Tenant Hold", "Tenant Payment Agreement", "Legal", "Credit Check", "Data", "Family Detail Info", "Lease Charges", "Waiting Lists", "Inspection", "URP Distribution", "Roommates", "Attachment", "Memos (2)", "Memos", "EFT Setup", "Credit Card Setup", "Resident History", "Manage Rentable Items", "New WO", "MPAC Res. Tenant", "MPAC Comm. Tenant", "RTA Charges", "N4 History", "Collections", "Revenue Management", and "Renters Insurance".

The Memo Information pop-up window displays.

Note: If other memos exist for that person or unit, the information from the most recent memo displays.

VOYAGER INTERFACE BASICS

Memo Information

Memos for: SMITH (10007362)

Date	Type	Status	Notes
10/30/2012	One Way Referral Letter		One Way Referral Letter sent t
10/29/2012	Request Reasonable Accommodations		Request Reasonable Accommo

Date: 10/30/2012 Show on Calendar

Time: 11:26 pm

Type: Property: vo_nomtw

Status: Unit: 13273

Result: Unit Type:

Agent: Employee:

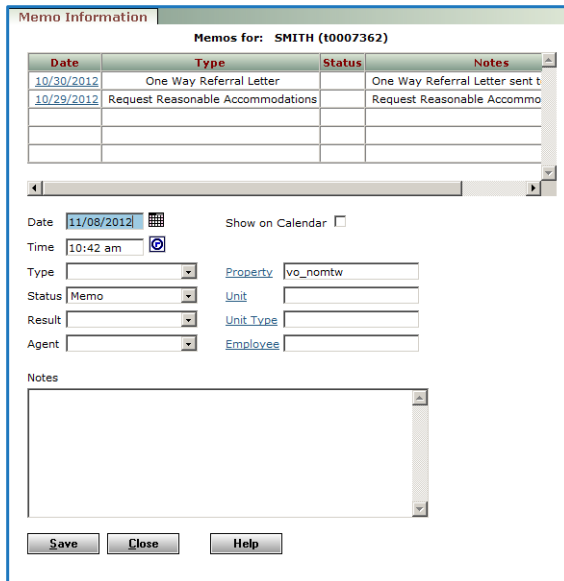
Notes

One Way Referral Letter sent to JEWEL SMITH on: 10/30/2012.
Letter sent By: Igreene.

Save Close New Delete Help

- To create a new memo, click New. The Memo Information window refreshes and you can enter the information for the new memo.

VOYAGER INTERFACE BASICS



Date	Type	Status	Notes
10/30/2012	One Way Referral Letter		One Way Referral Letter sent t
10/29/2012	Request Reasonable Accommodations		Request Reasonable Accommo

Date: 11/08/2012 Show on Calendar

Time: 10:42 am

Type: Property: vo_nomtw

Status: Memo Unit:

Result: Unit Type:

Agent: Employee:

Notes:

Save Close Help

- In the Memo Information window, enter the information for that memo into the necessary fields.

Note: The information to enter into the Memo Information window depends on the scenario and departmental standards for entering memos.

Each department may specify that the notes should be formatted a certain way. See the Business Process document related to the procedure which will have specific examples for notes, memos and other related issues.

- Click Save. The memo which was just saved displays in the list at the top of the Memo Information screen.

Commented [CO12]: Change to information icon/table

Commented [CO13]: Include this text with CO14

VOYAGER INTERFACE BASICS

Memo Information

Memos for: SMITH (10007362)

Date	Type	Status	Notes
11/05/2012	Program Move Elective	Memo	Received a request from the P
10/30/2012	One Way Referral Letter		One Way Referral Letter sent t
10/28/2012	Request Reasonable Accommodations		Request Reasonable Accommo

Date: 11/08/2012 Show on Calendar

Time: 10:44 am

Type: Property: vo_nomtw

Status: Memo Unit:

Result: Unit Type:

Agent: Employee:

Notes

- Click Close. The Memo Information screen closes.

VOYAGER INTERFACE BASICS

Generate a Letter

Commented [DC14]: (TW) Add second scenario of letters.

Many of the letters will generate overnight for review each morning. The letters which generate overnight are from different groups such as inspections. In the case of inspections, after the results of the inspection are recorded, the letters generate. The AA will review the letters prior to being produced and mailed by Document Services.

In cases where an individual letter is needed for a specific action, use the links on the right hand side to generate the letter needed or go to the letters section of the home screen. The letter will generate to the screen for review.

The screenshot displays the Voyager interface for an inspection record. On the left is a list of inspections. The main area shows details for a specific inspection, including location, unit, and audit fields. On the right, a sidebar contains various links and buttons. A red box highlights the 'Reports' section, which includes a 'Schedule Letter' link. A red arrow points to this link.

Code	Name	Phone #
t000858	BETTY PARKS (current)	(707) 899-6756
v0001708	C RIDGE LLC DBA CASCADE GLEN APTS-201025	(404) 349-0713