

Technical Proposal



Response to Solicitation 710-21-0035 Emergency Rental Assistance (ERA) Program

Due March 19, 2021, 9 AM Central Time

United States | Canada | Europe | Asia | Australia | Middle East

March 17, 2021

Margurite Al-Uqdah
Arkansas Department of Human Services, Office of Procurement
112 West 8th Street
Little Rock, AR 72201

Dear Ms. Al-Uqdah:

Thank you for the opportunity to respond to Solicitation 710-21-0035 for the Emergency Rental Assistance (ERA) Program. We propose the Yardi Rent Relief platform for managing emergency rental assistance programs. Our proposal includes program management, customer service, staffing, and technology to process applications, support residents, and disburse payments securely, accurately, and quickly.

We developed Yardi Rent Relief based on our experience and existing infrastructure and launched the platform publicly in early March with eight county- and city-level agencies and one state agency. During the first few days, Yardi Rent Relief was accessed by 50,000+ users, who submitted 10,000+ applications without any performance impact. Because it is based on our RENTCafé technology, which routinely handles rent payments for eight million tenants each month, we expect Yardi Rent Relief to process millions of applications easily in short order.

Yardi Rent Relief includes public-facing portals for landlords and renters, flexible program and case management tools, and a reliable, high-capacity payment delivery system. It can be branded for the State and rapidly deployed. It offers the following path to optimizing the disbursement of funds to your residents who need rental assistance:

- Applicants and landlords quickly apply for needed funds by accessing secure, browser-based, user-friendly applicant and landlord portals.
- Case management personnel efficiently receive applications, determine eligibility, approve cases, process payments, and notify applicants and landlords.
- DHS can easily monitor the program's success through transparent auditing, quality control, and analysis from real-time dashboards.
- Landlords receive secure, auditable payments via ACH.
- The State saves time and money with a secure, cloud-based platform.

Based on our existing experience and infrastructure, we are uniquely qualified to staff and manage the rental assistance program for DHS. For 37 years, Yardi has delivered software and services for the housing industry. Our clients use our products and services to manage 2.5 million affordable units and 9+ million market-rate units. We have delivered housing and payment disbursement software and customer service solutions for 250+ PHAs for over 20 years, including Section 8, disaster relief, and CARES Act management.

Please visit RentRelief.com for additional information. We look forward to assisting you with helping Arkansas residents overcome housing instability.

Sincerely,



Arnold Brier
Vice President

Table of Contents

1.	Bid Signature Page & Vendor Agreement.....	4
1.1.	Vendor Agreement & Compliance	5
2.	Official Bid Price Sheet	6
3.	EO 98-04 Disclosure Form	7
4.	Copy of Prospective Contractor’s Equal Opportunity Policy	9
5.	Proposed Subcontractors Form	10
6.	Quote	11
7.	Information for Evaluation	12
7.1.	Experience & Qualifications	12
7.2.	Client Assistance Capabilities.....	20
7.3.	Technological Capabilities.....	23
7.4.	Community Outreach Plan	41
7.5.	Payment Processing & Distribution	41
7.6.	Data Management & Security.....	46
7.7.	Audit & Record Retention.....	49
7.8.	Implementation Plan.....	49

1. Bid Signature Page & Vendor Agreement

SIGNATURE PAGE

Type or Print the following information.

<input type="checkbox"/> PROSPECTIVE CONTRACTOR'S INFORMATION				
Company:	Yardi Systems, Inc.			
Address:	430 South Fairview Avenue			
City:	Santa Barbara	State:	California	Zip Code: 93117
Business Designation:	<input type="checkbox"/> Individual <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Public Service Corp <input type="checkbox"/> Partnership <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Nonprofit			
Minority and Women-Owned Designation*:	<input checked="" type="checkbox"/> Not Applicable <input type="checkbox"/> American Indian <input type="checkbox"/> Asian American <input type="checkbox"/> Service Disabled Veteran <input type="checkbox"/> African American <input type="checkbox"/> Hispanic American <input type="checkbox"/> Pacific Islander American <input type="checkbox"/> Women-Owned			
AR Certification #: <u>This is not applicable.</u> * See <i>Minority and Women-Owned Business Policy</i>				

PROSPECTIVE CONTRACTOR CONTACT INFORMATION			
Provide contact information to be used for bid solicitation related matters.			
Contact Person:	Jeff Bischoff	Title:	Senior Director, Public Housing
Phone:	(805) 315-2852	Alternate Phone:	(800) 866-1144 ext. 1636
Email:	Jeff.Bischoff@yardi.com		

CONFIRMATION OF REDACTED COPY
<input checked="" type="checkbox"/> YES, a redacted copy of submission documents is enclosed. <input type="checkbox"/> NO, a redacted copy of submission documents is <u>not</u> enclosed. I understand a full copy of non-redacted submission documents will be released if requested. <i>Note: If a redacted copy of the submission documents is not provided with Prospective Contractor's response packet, and neither box is checked, a copy of the non-redacted documents, with the exception of financial data (other than pricing), will be released in response to any request made under the Arkansas Freedom of Information Act (FOIA). See Bid Solicitation for additional information.</i>

ILLEGAL IMMIGRANT CONFIRMATION
By signing and submitting a response to this <i>Bid Solicitation</i> , a Prospective Contractor agrees and certifies that they do not employ or contract with illegal immigrants. If selected, the Prospective Contractor certifies that they will not employ or contract with illegal immigrants during the aggregate term of a contract.

ISRAEL BOYCOTT RESTRICTION CONFIRMATION
By checking the box below, a Prospective Contractor agrees and certifies that they do not boycott Israel, and if selected, will not boycott Israel during the aggregate term of the contract.
<input checked="" type="checkbox"/> Prospective Contractor does not and will not boycott Israel.

An official authorized to bind the Prospective Contractor to a resultant contract must sign below.

The signature below signifies agreement that any exception that conflicts with a Requirement of this *Bid Solicitation* will cause the Prospective Contractor's bid to be disqualified:

Authorized Signature:  Title: Vice President
 Printed/Typed Name: Arnold Brier Date: March 17, 2021


1.1. Vendor Agreement & Compliance

SECTION 1, 2, 3 – VENDOR AGREEMENT AND COMPLIANCE

- Any requested exceptions to items in this section which are NON-mandatory **must** be declared below or as an attachment to this page. Vendor **must** clearly explain the requested exception, and should label the request to reference the specific solicitation item number to which the exception applies.
- Exceptions to Requirements **shall** cause the vendor's proposal to be disqualified.

Yardi acknowledges the reference to the Standard Terms and Conditions in Section 3 of the RFP. Yardi accepts that the eventual contract will be based on Arkansas DHS's Standard Terms and Conditions. However, Yardi expects that the final contract provisions will be reasonably negotiated and mutually agreed upon. Yardi has undertaken and successfully closed similarly structured agreements with many similar clients. As a result of this experience, we are confident that we can reach a final agreement for this business partnership; we will work earnestly toward that end if we are selected as the preferred vendor. We will be pleased to submit a copy of our own standard agreement upon request.

By signature below, vendor agrees to and **shall** fully comply with all Requirements as shown in this section of the bid solicitation. **Use Ink Only**

Vendor Name:	Yardi Systems, Inc.	Date:	March 17, 2021
Authorized Signature:		Title:	Vice President
Print/Type Name:	Arnold Brier		

2. Official Bid Price Sheet

710-21-0035 Emergency Rental Assistance

OFFICIAL BID PRICE SHEET

<u>DESCRIPTION</u>	<u>Annual Cost for Initial Term</u>	<u>Percentage of ERA Funding</u>
Management, oversight, and operation of a comprehensive turn-key Emergency Rental Assistance program	\$6,000,000	3.4%


Note: Estimated Annual Cost should be expressed in percentage of ERA dispersed on behalf of the State and shall not exceed 6.5% of the total funding of \$173,684,765.50, or \$11.29 million. All expenses associated with the delivery and implementation of the proposed services must be included in the Vendor's Official Bid Price.

****NOTE:** All bid pricing **must** be in United States dollars and cents. **Please provide a detailed budget as a separate attachment.**

Please see [Section 6. Quote](#) for our detailed project budget.

AUTHORIZATION SIGNATURE

By my signature below, I certify that the aforementioned statements are true and correct and that I accept the Terms and Conditions as presented in this bid, and that I am authorized by the respondent to submit this bid on his/her behalf.

Vendor Name:	Yardi Systems, Inc.	Date:	March 17, 2021
Authorized Signature:		Title:	Vice President
Print/Type Name:	Arnold Brier		

CONTRACT AND GRANT DISCLOSURE AND CERTIFICATION FORM

Failure to complete all of the following information may result in a delay in obtaining a contract, lease, purchase agreement, or grant award with any Arkansas State Agency.

SUBCONTRACTOR:

SUBCONTRACTOR NAME:

☐ Yes ☐ No

IS THIS FOR:

TAXPAYER ID NAME:

Goods? Services? Both?

YOUR LAST NAME:

FIRST NAME

M.I.:

ADDRESS:

CITY:

STATE:

ZIP CODE:

COUNTRY:

AS A CONDITION OF OBTAINING, EXTENDING, AMENDING, OR RENEWING A CONTRACT, LEASE, PURCHASE AGREEMENT, OR GRANT AWARD WITH ANY ARKANSAS STATE AGENCY, THE FOLLOWING INFORMATION MUST BE DISCLOSED:

F O R I N D I V I D U A L S *

Indicate below if: you, your spouse or the brother, sister, parent, or child of you or your spouse is a current or former: member of the General Assembly, Constitutional Officer, State Board or Commission Member, or State Employee:

Position Held	Mark (√)		Name of Position of Job Held [senator, representative, name of board/ commission, data entry, etc.]	For How Long?		What is the person(s) name and how are they related to you? [i.e., Jane Q. Public, spouse, John Q. Public, Jr., child, etc.]	
	Current	Former		From MM/YY	To MM/YY	Person's Name(s)	Relation
General Assembly							
Constitutional Officer							
State Board or Commission Member							
State Employee							

☐ None of the above applies

F O R A N E N T I T Y (B U S I N E S S) *

Indicate below if any of the following persons, current or former, hold any position of control or hold any ownership interest of 10% or greater in the entity: member of the General Assembly, Constitutional Officer, State Board or Commission Member, State Employee, or the spouse, brother, sister, parent, or child of a member of the General Assembly, Constitutional Officer, State Board or Commission Member, or State Employee. Position of control means the power to direct the purchasing policies or influence the management of the entity.

Position Held	Mark (√)		Name of Position of Job Held [senator, representative, name of board/commission, data entry, etc.]	For How Long?		What is the person(s) name and what is his/her % of ownership interest and/or what is his/her position of control?		
	Current	Former		From MM/YY	To MM/YY	Person's Name(s)	Ownership Interest (%)	Position of Control
General Assembly								
Constitutional Officer								
State Board or Commission Member								
State Employee								

☐ None of the above applies

Contract and Grant Disclosure and Certification Form

Failure to make any disclosure required by Governor's Executive Order 98-04, or any violation of any rule, regulation, or policy adopted pursuant to that Order, shall be a material breach of the terms of this contract. Any contractor, whether an individual or entity, who fails to make the required disclosure or who violates any rule, regulation, or policy shall be subject to all legal remedies available to the agency.

As an additional condition of obtaining, extending, amending, or renewing a contract with a state agency I agree as follows:

1. Prior to entering into any agreement with any subcontractor, prior or subsequent to the contract date, I will require the subcontractor to complete a **CONTRACT AND GRANT DISCLOSURE AND CERTIFICATION FORM**. Subcontractor shall mean any person or entity with whom I enter an agreement whereby I assign or otherwise delegate to the person or entity, for consideration, all, or any part, of the performance required of me under the terms of my contract with the state agency.

2. I will include the following language as a part of any agreement with a subcontractor:

Failure to make any disclosure required by Governor's Executive Order 98-04, or any violation of any rule, regulation, or policy adopted pursuant to that Order, shall be a material breach of the terms of this subcontract. The party who fails to make the required disclosure or who violates any rule, regulation, or policy shall be subject to all legal remedies available to the contractor.

3. No later than ten (10) days after entering into any agreement with a subcontractor, whether prior or subsequent to the contract date, I will mail a copy of the **CONTRACT AND GRANT DISCLOSURE AND CERTIFICATION FORM** completed by the subcontractor and a statement containing the dollar amount of the subcontract to the state agency.

I certify under penalty of perjury, to the best of my knowledge and belief, all of the above information is true and correct and that I agree to the subcontractor disclosure conditions stated herein.

Signature _____ Title _____ Date _____

Vendor Contact Person _____ Title _____ Phone No. _____

Agency use only

Agency Number _____ Agency Name _____ Agency Contact Person _____ Contact Phone No. _____ Contract or Grant No. _____

4. Copy of Prospective Contractor's Equal Opportunity Policy

We consider diversity to be a key benefit to our company. We maintain an affirmative action program and equal employment opportunity. It is our company's policy to comply with all applicable federal, state, and local laws governing nondiscrimination in employment and to ensure equal opportunity in all terms and conditions of employment or potential employment. We can provide staff information in the form of an EEO-1 report after we execute a non-disclosure agreement or contract.

Yardi prohibits discrimination and harassment against any employee or applicant for employment because of race, color, religion, sex, national origin, age, disability, veteran status, genetic information, or any other legally protected group status.

Yardi engages in affirmative action measures to ensure that qualified applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, national origin, disability or protected veteran status. Yardi has established an audit and reporting system to allow for effective measurement of its affirmative action activities. To implement this policy, Yardi will:

- Recruit, hire, train and promote qualified persons in all job titles, without regard to race, color, religion, sex, national origin, age, disability, veteran status, genetic information, or any other legally protected group status
- Ensure that employment decisions are based only valid job requirements
- Ensure that all personnel actions and employment activities such as compensation, benefits, promotions, layoffs, return from layoff, Yardi-sponsored programs, and tuition assistance will be administered without regard to race, color, religion, sex, national origin, age, disability, veteran status, genetic information or any other protected group status

Employees and applicants for employment will not be subjected to harassment, intimidation, threats, coercion or discrimination because they have engaged or may engage in: (1) filing a complaint, (2) opposing any act or practice made unlawful by, or exercising any other right protected by, any Federal, State or local law requiring equal opportunity, including Section 503 of the Rehabilitation Act, the affirmative action provisions of VEVRAA, and Executive Order 11246 or (3) assisting or participating in an any investigation, compliance evaluation, hearing, or any other activity related to the administration of any Federal, State or local law requiring equal opportunity, including Section 503 of Rehabilitation Act, the affirmative action provisions of VEVRAA, and Executive Order 11246.

5. Proposed Subcontractors Form

PROPOSED SUBCONTRACTORS FORM

- **Do not** include additional information relating to subcontractors on this form or as an attachment to this form.


PROSPECTIVE CONTRACTOR PROPOSES TO USE THE FOLLOWING SUBCONTRACTOR(S) TO PROVIDE SERVICES.

Type or Print the following information

Subcontractor's Company Name	Street Address	City, State, ZIP
Not applicable	Not applicable	Not applicable

☒ **PROSPECTIVE CONTRACTOR DOES NOT PROPOSE TO USE SUBCONTRACTORS TO PERFORM SERVICES.**

By signature below, vendor agrees to and **shall** fully comply with all Requirements related to subcontractors as shown in the bid solicitation.

Vendor Name:	Yardi Systems, Inc.	Date:	March 17, 2021
Authorized Signature:		Title:	Vice President
Print/Type Name:	Arnold Brier		

6. Quote

Our price of \$6,000,000 will be paid in equal monthly installments over 10 months. This pricing is equivalent to 3.4% of ERA funding and valid for 180 days from the RFP due date.

This fee is fully inclusive of cloud hosting, software licensing, ongoing technical support, call center for customer service, case management, program management services, and marketing and outreach via community-based organizations (CBO). The price of \$6,000,000 includes \$300,000 for marketing and local nonprofit and CBO relationships.

7. Information for Evaluation

INFORMATION FOR EVALUATION

- *Provide a response to each item/question in this section. Vendor may expand the space under each item/question to provide a complete response.*
- ***Do not*** include additional information if not pertinent to the itemized request.

We respond to the Information for Evaluation section of the RFP response packet in our own format to allow for easy cross-referencing.

7.1. Experience & Qualifications

- (A) Describe previous or current engagements performed by your organization within the last three (3) years of similar size and scope to those described in the Solicitation that demonstrate your organization's capability to perform all services required in the Solicitation. For each engagement referenced, provide the entity name, contact information (including contact name and email address), contract term dates, and geographic area serviced. (Section 1.3B) Include whether you are currently under contract with any other systems for ERA, what locations, and go-live dates for those states. (5 points)**

We have provided housing program and payment disbursement software for 250+ PHAs for over 20 years, including Section 8, disaster relief, and CARES Act management. We have implemented the proposed Yardi Rent Relief system at eight agencies receiving ERAP funding so far, including the ones listed below. The State of Connecticut and Cook County, Illinois (which includes Chicago) both have similar population sizes as the State of Arkansas. All eight of these ERAP clients have been implemented on budget and on time, and all went live within two weeks. The references and project case studies below illustrate our experience with successful implementation of the Emergency Rental Assistance program. The following clients are available as references for the Yardi Rent Relief platform and services.

Reference 1 Connecticut Department of Housing (CTDOH)	
Address	505 Hudson Street Hartford, CT 06106
Contact	Seila Mosquera-Bruno, Commissioner
Contact Details	seila.mosquera-bruno@ct.gov (860) 270-8037
Description	CTDOH launched UniteCT , which is powered by Yardi Rent Relief, on March 12, 2021 to aid tenants and landlords by disbursing of ERAP funds. We provided software, implementation, and ongoing training services to support UniteCT.

Reference 2 Housing Authority of Cook County (HACC)	
Address	175 W Jackson Boulevard Chicago, IL 60604
Contact	Alesia Hushaw, Chief of Staff
Contact Details	ahushaw@thehacc.org (312) 542-4655
Description	To support HACC's ERAP applications and fund disbursement, we deployed Yardi Rent Relief on March 11, 2021. Within five days, Cook County COVID-19 Recovery handled over 20,000 registered applicants. We provided software, implementation, and ongoing training services to support HACC.

ERAP Engagement 1: Connecticut Department of Housing

About this Client

Connecticut Department of Housing uses Yardi Rent Relief for its ERA program. This state ERAP provides rental and utility assistance to qualified Connecticut households financially impacted by COVID-19. UniteCT is funded by Connecticut's \$235 million share of the \$25 billion appropriated by Congress for emergency rental and utility assistance in the stimulus package from December 2020.



Project Timeframe & Description

This project began in late February 2021. The application portal was launched in the second week of March 2021. Within two weeks of contract execution, Yardi delivered technology, training, and a web-based application portal to support an immediate launch. The platform is scheduled to process \$235 million in ERA funds to support residents throughout the State of Connecticut. UniteCT uses case management workflows to review, process, and approve applications, followed by payments to landlords and utility companies.

Project Milestones

- A multilingual website, UniteCT (ctdoh.rentrelief.com/content2/access/register), was launched on March 12, 2021.
- Within the first few days of launch, the program handled over 10,000 registered users.
- Within a week, we completed the initial technology environment and user adoption training for case management staff.

Performance & Record of Completion

- The applicant and tenant portals are deployed and in use.
- Case management in Rent Relief is deployed and in use.
- Payments to landlords and utilities are deployed.

ERAP Engagement 2: Cook County, Illinois

About this Client

The Housing Authority of Cook County (HACC) uses Yardi Rent Relief for its ERA program. Cook County is one of the largest counties in the nation, with a population of over five million including the city of Chicago. Cook County's COVID-19 recovery funding, which excludes the City of Chicago, is over \$72 million of the \$25 billion appropriated by Congress for emergency rental and utility assistance in the stimulus package from December 2020.



Project Timeframe & Description

This project began in late February 2021. Within two weeks of contract execution, Yardi delivered technology, training, and a web-based application portal to support an immediate launch. The platform is scheduled to process \$72 million in ERA funds to support landlords and tenants throughout Cook County. The program streamlines workflows to review, approve, and process applications and disburse payments to landlords, tenants, and utility companies in their area.

Project Milestones

- We launched the Cook County COVID-19 Recovery website (hacc.rentrelief.com/content2/access/register).
- Within the first five days of launch, the program handled over 20,000 registered users.
- Within a week, we completed the initial technology environment and user adoption training for case management staff.

Performance & Record of Completion

- The applicant and tenant portals are deployed and in use.
- Case management in Rent Relief is deployed and in use.
- Payments to tenants, landlords, and utilities are deployed and being processed.

ERAP Engagement 3: Kern County, California

About this Client

The County of Kern and City of Bakersfield, CA, use Yardi Rent Relief for their ERA program. With a population of over 900,000 and spanning rural, mountainous areas with limited internet access, the Housing Authority of Kern has leveraged the Yardi application to allow the input of manual applications. Third-party resources on the ground aid tenants and landlords with gathering documents in otherwise hard-to-reach locations. This innovative process demonstrates our platform's flexibility and adaptability to various populations. The County of Kern's Rent and Utility Assistance program (RUP) is funded by over \$27 million of the \$25 billion appropriated by Congress for emergency rental and utility assistance in the stimulus package from December 2020.



Project Timeframe & Description

This project began in February 2021 and is ongoing. Within a week of contract negotiations, Yardi delivered technology, training, and a web-based application portal to support an immediate launch on March 1, 2021. The Kern County RUP site workflows to review, approve, and process applications and approve payments to landlords, tenants, and utility companies in the area.

Project Milestones

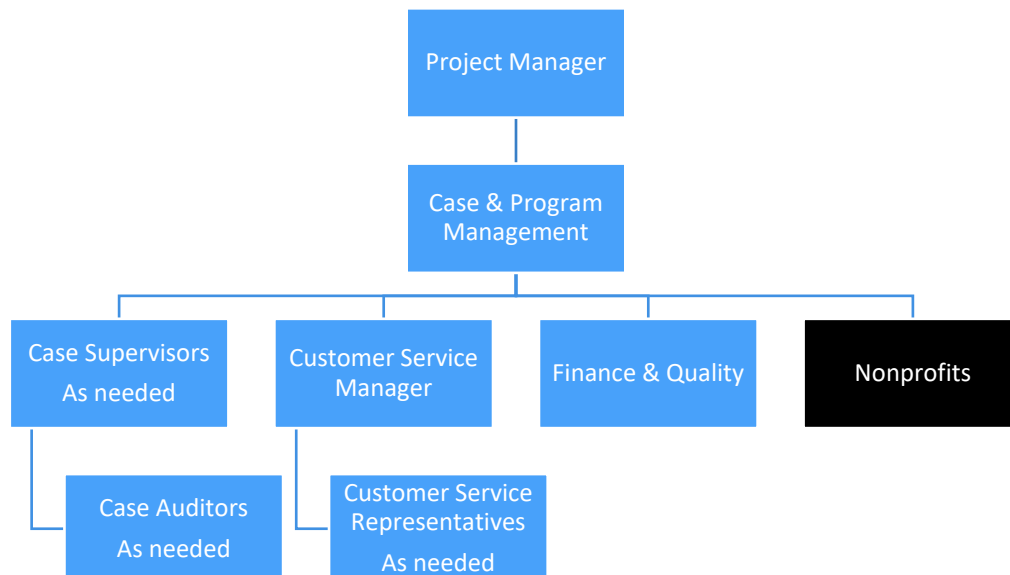
- We launched the RUP website for Kern County and the City of Bakersfield (kern.rentrelief.com/content2/access/register).
- Within the first week of launch, the program handled over 2,000 registered users, with additional applications processed manually by case auditors.
- Within a week, we completed the initial technology environment and user adoption training for case management staff.

Performance & Record of Completion

- The applicant and tenant portals are deployed and in use.
- Case management in Rent Relief is deployed and in use.
- Payments to landlords, tenants, and utilities are deployed and being processed.

(B) Provide an organization chart with job descriptions, including minimum qualifications, for key personnel and Project Lead. (5 points)

We propose the following project organization. Our team will accommodate staffing levels as necessary as demand ebbs and flows.



Yardi is well positioned to support program management, case management, and customer service functions for DHS. We currently deliver compliance management and audit services to a large client base, and our expert teams of case auditors and supervisors can take on this crucial function on DHS's behalf.

Our program and case management teams will work closely with DHS stakeholders to establish a clear line of communication between all parties. We will ask DHS to provide a list of contacts and pair them with named resources on our management team to facilitate consistent communication.

Program Management

The Yardi Rent Relief program manager will provide general program oversight and facilitate agency-specific policies and procedures. Program managers serve as the primary escalation point, have in-depth knowledge of agency rules, and ensure compliance with Treasury and state-level guidelines.

The effectiveness of the following activities will determine the success of the Emergency Rental Assistance (ERA) program:

- Promotion of the ERA program via marketing channels and community outreach organizations
- Acceptance of applications for rental assistance from tenants and landlords via a multilingual, easy-to-use application portal
- Review and processing of applications using a robust and streamlined case management system that ensures compliance with guidelines while reducing the potential for fraud
- Disbursement of funds to landlords, tenants, or utilities based on program guidelines
- Obligation of funds on the specified timelines while complying with treasury, state, and local guidelines. For example, the U.S. Treasury expects the agencies to obligate 65% of the grant by September 30, 2021.

The program manager will work with DHS to set up relationships with local nonprofits and community-based organizations. These relationships will be leveraged to promote ERAP in communities that may lack the ability to apply online. With the help of local community organizations and in collaboration with DHS, we will create a marketing program that covers multiple channels such as Google, social media, local news, and community events.

When an ERA program is launched, it usually experiences an initial surge in applications. This presents a unique challenge in terms of processing capacity, staffing, and response times, which could result in negative media attention. The program manager will deploy Yardi Rent Relief features to counteract these issues by establishing application priority schedules. For example, Yardi Rent Relief supports a priority system that is based on percent of AMI, days unemployed, arrears in months, likelihood of eviction, etc. Once priorities are set up, case management will schedule cases with the highest priority first. For each priority, Yardi Rent Relief can also implement a payment plan, which sorts payments by percent of arrears or months past due.

In conjunction with DHS, the program manager will create the right set of policies and procedures and configure the following Rent Relief parameters:

- Prioritization based on AMI, unemployment duration, eviction notice, arrears, and date of application
- Payment amount determination based on case priority, maximum payment restrictions, and months in arrears or forward payments
- Utility payments to the utility company and optionally to the tenant
- Application processing strategy with regards to minimum documentation and verification rules

- Case management methodology for assigning cases to case auditors, managing processing timelines and targets, and status change rules (e.g., closing incomplete applications if three follow-up emails remain unanswered)
- Appeals process
- Fraud detection and verification rules
- Case approval for the payment process along with exception and escalation management
- Funding requests and funding protocol
- Surge management, including prioritization, communication, and staffing
- Agency review protocol

Our experience suggests that Arkansas will likely see 15,000 users and potentially 5,000 completed applications in the first one or two weeks. Our staff and our system will easily handle this workload. In anticipation of this initial surge, the program manager will ensure adequate capacity to handle the initial volume of applications.

Case Auditors

Case auditors verify that each application submitted by tenants, authorized tenant representatives, or landlords is complete and accurate. Case auditors perform required verification steps to ensure that the data in each application is accurate and substantiated by the provided documentation. Case auditors:

- Review each case and compare the data provided by the tenant and landlord.
- Identify and record any findings using the activity logging tools in Yardi Rent Relief.
- Communicate via email or phone with applicants and landlords to request supplemental information or replacement documents.

Case Supervisors

Case supervisors verify that the applications reviewed by the case auditors are complete and accurate. Case supervisors perform detailed audits of the data and documents submitted by the tenant, authorized tenant representative, and/or landlord. They approve or deny cases based on the jurisdiction rules defined by DHS.

Each Yardi case team consists of a case supervisor and six case auditors. Each case auditor will process 20 cases per day, i.e., a case team will be able to process 600 cases per week or 2,400 cases per month. The program manager will ensure adequate staffing to handle the call volume and case workload.

Minimum Qualifications

Customer Service Representatives	<ul style="list-style-type: none"> •High school degree •Good communication skills •Familiar with software
Case Auditors & Quality Control Specialists	<ul style="list-style-type: none"> •College degree preferred with exceptions •Good communication and time management skills •Attention to detail
Supervisors & Managers	<ul style="list-style-type: none"> •College degree •Housing and software experience preferred •Demonstrated communication and management skills

Staff Resumes

The sample biographies below illustrate Yardi's staff's relevant experience. In case the listed individuals are unavailable, we will select resources with comparable experience and skill.

Elisabeth Daniels, Project Manager for Yardi Rent Relief

Professional Profile

Elisabeth Daniels leads consulting practices, technical support, and case management teams supporting day-to-day operations and insuring governance of documentation, workflows, and product usage.



Experience

Elisabeth joined Yardi in 2006 with our acquisition of CLASSIC Real Estate Systems, an affordable housing software provider. She has a strong foundation in operations, client relationship development, and consulting. Her knowledge of the subsidized housing industry spans the LIHTC, HOME, Section 8, and 515 Rural Development programs. Over the past 14 years, Elisabeth has been instrumental in the development and growth of Yardi's Atlanta office. She has developed processes, implemented new technology, influence the development of our products, and mentored employees and leaders across the country. In 2015, Elisabeth joined our consulting practice group, where she currently leads teams supporting some of our most strategic residential and affordable housing clients.

Elisabeth recently managed the implementation of ERA programs for eight Yardi Rent Relief clients. These implementations were completed on time and in line with agency policies and procedures.

Education

Elisabeth attended Georgia Gwinnett College in Lawrenceville, GA. She studied international business and completed her PMP certification through Gwinnett Technical Institute in Lawrenceville.

Amy Pence, Case Management Supervisor for Yardi Rent Relief

Professional Profile

Amy Pence leads our service teams for several major Yardi products and oversees the technical support and case management teams. She is directly responsible for the delivery of services, day-to-day operations, and governance of documentation, workflows, and successful product usage for products such as Yardi Voyager and RENTCafé.



Experience

Amy joined Yardi in 2004 with six years of experience in regional and on-site property management. She has a strong foundation in Yardi's product operations and serves as a primary development liaison to ensure that clients' application needs are met. Over the past 17 years, Amy has been instrumental in the development and growth of Yardi's workforce in North Carolina. She was involved in developing processes, implementing new technology, influencing the development of our products, and mentoring employees and leaders across the United States. During her time at Yardi, Amy has implemented and supported Yardi Voyager and RENTCafé for some of our largest multifamily clients.

Amy recently managed the implementation of ERA programs for eight Yardi Rent Relief clients. These implementations were completed on time and in line with agency policies and procedures.

Education

Amy attended Durham Technical College in Durham, NC. She studied real estate brokerage and is a licensed real estate broker in North Carolina.

Kevin Fortsch, Customer Service Director for Yardi Rent Relief

Professional Profile

Kevin Fortsch has 20 years of call center management experience, including nine years with Yardi. He has a successfully record in executing organizational goals and specializes in leadership, resource management, and building client relationships.



Experience

Kevin joined Yardi in 2012 and is responsible for multisite call center service delivery and performance. Our call centers handled over four million interactions in 2020 and support resident and leasing services for over 200 clients, including multifamily communities, single family homes, and military housing.

Education

Kevin has a B.A. in psychology from Dallas Baptist University.

7.2. Client Assistance Capabilities

- (A) Discuss your organization’s capability to accept and process electronic and paper applications, including call center support, training methods, and other customer assistance functions, and the ability to track and match tenants with landlords even when both apply for the same housing unit. (5 points)**

The size and scope of this program requires an approach that ensures prompt deployment, maximum output, and consistent compliance, accountability, and transparency. Yardi Rent Relief facilitates a rapid implementation. We back up our technology with a strong service infrastructure to support you. We include an overview of the application flow and program workflow under this question and illustrate how our platform matches tenants with landlords in detail under [Question \(C\) in Section 7.3. Technological Capabilities](#).

Tenants and landlords who are unable to apply online will be referred to an appropriate nonprofit or community-based organization, who can perform data entry from the paper application.

Call Center for Tenants & Landlords

Support for your local tenants, landlords, and nonprofits is available via Yardi’s call center. We will publish a toll-free number for this service; it will only answer questions rather than managing applications on behalf of residents. Our call center currently handles 300,000 interactions and calls per month and has the capacity to deliver fast, courteous, and knowledgeable assistance for your tenants and landlords.

Technical Support & Software Maintenance

We will assign a support team to train and support nonprofits and community-based organizations and answer their questions. We update Yardi Rent Relief as needed with functionality enhancements and modifications to maintain compliance with U.S. Treasury and other applicable regulations.

Training

We offer training webinars on the following topics:

- Tenant and landlord workflows, including the entire application and submission process
- Case management, including navigation and workflows for the case manager, case auditor, and case supervisor roles

Yardi Aspire, Yardi’s proprietary online training and assessment platform, automatically delivers the role-based Rent Relief training curriculum. This eLearning tool is being used by more than 160,000 learners today and expedites the training process. Employees access their learning plan through an intuitive, role-based training dashboard. The learning plan clearly communicates training requirements and time estimates as well as important announcements for the user’s role. Users can track their progress on their dashboard, register for live training events, review written materials. We include a few sample screen shots of the system on the following pages.

Dashboard

RR 120 - Applicant Portal Overview: Walking through the Rent Relief Application ⓘ

100% Complete

Course Map
My Activity

Prev
Next

Replay

Completing the Application Information Screen

Residents navigate through an intuitive applicant workflow that prompts them to complete the required household information correctly. Automated calculations are built-in based on income limit, county rules, and regulations to eliminate manual calculation errors.

Home

Rent Relief / Applicant (Case # 1000345)

Applicant Information
Additional Information
Occupants
Rental Information
Landlord Information
Bank Information
Supporting Documents
Submit
Case
Payment Details

Applicant Information

* indicates required fields

First Name *

Middle Name

Last Name *

County

New Haven

How many people are in your household?

5

Household Income at the time of submitting this application, including unemployment benefits

\$0.00

Have you had income reduction due to COVID?

Yes

Do you qualify for unemployment?

No

Phone Type *

Cell

Phone Number *

(805) 111-2222

Email Address *

marishou@yahoo.com

Are you renting your primary residence?

Yes

Are you currently receiving Section-8 assistance?

No

Save
Resupply
Appeal
Next >

Rent Relief


Class Discussion

Click here to share something

Figure 1: Applicant Portal Overview Course in Yardi Aspire

Learning Plan Details





Rent Relief Case Management Training

As you work through the steps of this learning plan, you will gain familiarity with the Rent Relief program, the software we use to facilitate applications for rent relief, and the case management software you will use to assist applicants and landlords with the application process. Steps in your learning plan will unlock automatically as you progress through the training. Please don't hesitate to reach out if you need assistance as you prepare yourself for your new role.

Training Agenda

- Section 1 - Security Awareness Training
- Section 2 - Rent Assistance Program Overview
- Section 3 - Applicant Portal
- Section 4 - Landlord Portal
- Section 5 - Case Management Site
- Section 6 - Emergency Rental Assistance Program Overview
- Final Quiz

Duration: 5 hours

Section 1 - Security Awareness Training

In this section, we will discuss the importance of security when working in your new role.

Section Duration: 30 minutes

RR 100 - Security Awareness	Get Started	▶
-----------------------------	-------------	---

Section 2 - Rental Assistance Program Overview

In this section, you will be introduced to the criteria and methodology for completing applications.

Section Duration: 30 minutes

RR 050 - Rent Relief Overview	Get Started	▶
RR 060 - Application Workflow	Get Started	▶
RR 070 - Qualification Criteria and Evaluation Methods	Get Started	▶
Rent Relief Overview Section Quiz	Get Started	▶

Section 3 - Applicant Portal Overview

In this section, you will gain familiarity with Applicant Portal, including understanding how tenants evaluate their ability to qualify, how they will complete the application process, request an appeal and what to expect.

Section Duration: 1 hour

RR 110 - Applicant Portal Overview	Get Started	▶
RR 115 - Applicant Portal Overview: "Do I qualify?"	Get Started	▶
RR 120 - Applicant Portal Overview: Walking through the Rent Relief Application	Get Started	▶
RR 125 - Applicant Portal Overview: How to calculate income	Get Started	▶
RR 130 - Applicant Portal Overview: How to request an appeal	Get Started	▶
RR 135 - Applicant Portal Overview: Documentation Needed	Get Started	▶

Section 4 - Landlord Portal Overview

In this section, you will gain familiarity with the Landlord Portal, including understanding how landlords evaluate their ability to qualify, how they will complete the application process, request an appeal and what to expect.

Section Duration: 1 hour

RR 140 - Landlord Portal Overview	Get Started	▶
RR 150 - Landlord Portal Overview: How to calculate income	Get Started	▶
RR 160 - Landlord Portal Overview: How to request an appeal	Get Started	▶
RR 170 - Landlord Portal Overview: Documentation Needed	Get Started	▶

Section 5 - Case Management Site Overview

In this section, you will gain familiarity with the Case Management Site, including understanding how case managers evaluate their ability to qualify, how they will complete the application process, request an appeal and what to expect.

Section Duration: 1 hour

RR 180 - Case Management Site Overview	Get Started	▶
RR 190 - Case Management Site Overview: How to calculate income	Get Started	▶
RR 200 - Case Management Site Overview: How to request an appeal	Get Started	▶
RR 210 - Case Management Site Overview: Documentation Needed	Get Started	▶

Section 6 - Emergency Rental Assistance Program (ERA) Eligibility

In this section, we will further expand on program eligibility and comprehension of complex program rules. This section will recap items learned in Section 1: Emergency Rental Assistance Program Overview and further elaborate on program rules and requirements.

Section Duration: 60 minutes

RR 400 - ERA Quick Recap	Get Started	▶
RR 430 - Understanding and Verifying Income Calculations	Get Started	▶
RR 450 - Understanding Household Composition	Get Started	▶
RR 460 - Verification Requirements	Get Started	▶
RR 480 - FAQs	Get Started	▶
ERA Program Section Quiz	Get Started	▶

Final Quiz

You're almost finished! Complete the following final quiz to finish up your training.

Rent Relief Case Manager Final Quiz	Passed: 100%	✓
-------------------------------------	--------------	---

Figure 2: Sample Learning Plan

The course catalog is tailored to the training needs of each role. Our courses promote collaboration and display real-time feedback and dialog to the learner. The learner can take notes on the screen throughout the course, bookmark pages as favorites to flag content important to them, and advance at their own pace or having content read aloud.

- (B) Describe your capabilities in communicating with individuals who speak languages other than English. Include all languages you provide (e.g., English, Spanish, Marshallese) and how you will accommodate special populations such as those with cultural/health disparities. (5 points)**

Our call center currently offers support in English and Spanish for tenants, landlords, and tenant representatives. The Yardi Rent Relief portals are available in English Spanish, and many other languages. We look forward to discussing your specific needs.

We take a variety of steps to accommodate populations with cultural and health disparities, those without internet access at home, and more. We will work with DHS to identify language and cultural challenges and engage appropriate nonprofit and community-based organizations that can communicate with these special population segments.

Applicants and landlords can access our user-friendly portals through standard web browsers on any internet-connected device, including on smartphones, tablets, and web kiosks. The portals use responsive design to conform to the size of the user's device efficiently. The software can also extend secure access to nonprofit partner organizations to assist applicants with reasonable accommodations or other access needs.

Yardi Rent Relief makes it possible to submit and sign applications fully online, which eliminates many barriers to access and enables residents to complete the process on their own time from anywhere. After the application is submitted to the agency, the applicant or landlord receives an automatic confirmation email. The application is available as a downloadable or printable PDF after it is submitted.

If an applicant cannot or prefers not to use the portal, a nonprofit can serve as a proxy. Yardi Rent Relief includes a registration option for these proxies. This approach avoids the cost, effort, and risk associated with managing paper applications while ensuring equitable access for all applicants.

7.3. Technological Capabilities

(A) Describe your proposed system, including whether it is currently in operation, in development, or is a retrofit of an existing system. If the system is currently in operation, provide a list of the states and programs using it. (5 points)

Yardi Rent Relief is currently in operation, and we can begin deployment for DHS as soon as we execute an agreement. It was designed for the unique requirements of the Emergency Rental Assistance Program, which



eliminates the need for costly and lengthy customizations for our clients. We launched the platform publicly in early March with eight county- and city-level agencies and one state agency. [Section 7.1. Experience & Qualifications](#) includes several case studies and client references from these programs.

During the first few days of operation, 50,000+ users submitted over 10,000 applications via Yardi Rent Relief without any performance impact. Because it is based on our RENTCafé technology, which routinely handles rent payments for eight million tenants each month, we expect Yardi Rent Relief to process millions of applications easily in short order. Our technology also includes a powerful payment delivery system that completely automates the disbursement of approved funding.

The following agencies use Yardi Rent Relief:

- Connecticut Department of Housing
- Cook County, IL
- Kern County, CA
- Bakersfield, CA

- San Joaquin County, CA
- Erie County, PA
- Stockton, CA
- Long Beach, CA

(B) Describe your strategies for providing redundancy, fault tolerance, and an uptime of 99.9% scheduled website availability. (5 points)

Yardi Rent Relief is a SaaS platform. The application and database are hosted in the Google Cloud in a FedRAMP-compliant environment. Each component (processor, storage, networking) is operated in failsafe, redundant mode to ensure 99.9% uptime. There is no single point of failure that can cause downtime. Near real-time replication occurs to a geographically distinct Google site.

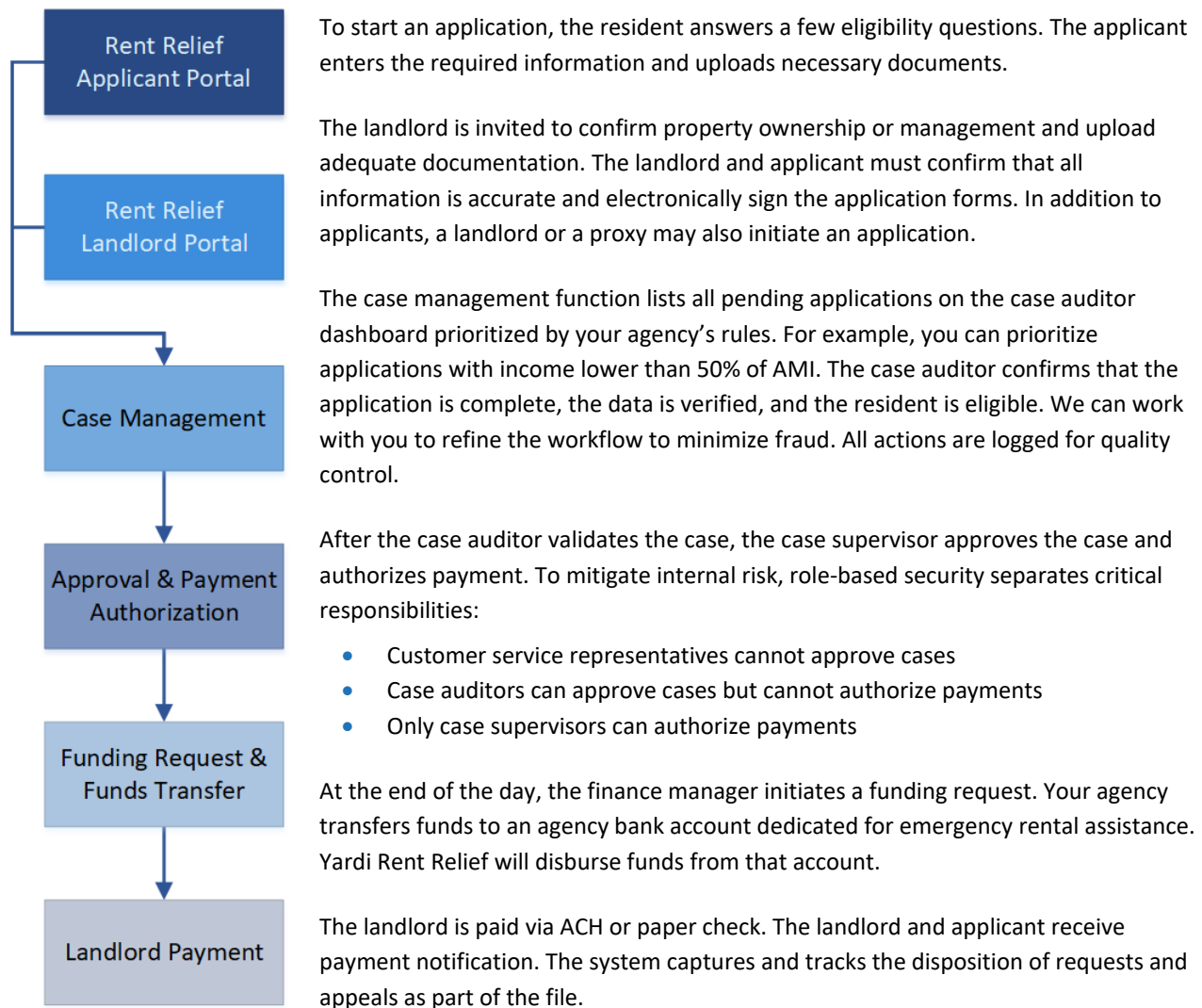
Yardi supports, maintains, and monitors the servers and network. We are responsible for ensuring that cloud services are available 24/7. Our SSAE 18 audit reports document our processes and are available for review under a suitable non-disclosure agreement.

(C) Describe your approach to a user-friendly, easy to understand interface for applicants. Include screen shots or examples to illustrate. (5 points)

Yardi Rent Relief walks applicants through a structured, easy-to-understand process to ensure they submit all of the required information. All screens are completely mobile-compatible and conform automatically to the user's screen size. The screen shots on the following pages are representative of our software and highlight the user-friendly experience for tenants, landlords, tenant representatives, and DHS staff. They only represent key aspects of the full system. We invite your selection team to attend one of our regular webinars available at RentRelief.com for a more in-depth product demonstration. We would also be pleased to walk you through a custom demo and answer any questions you may have.

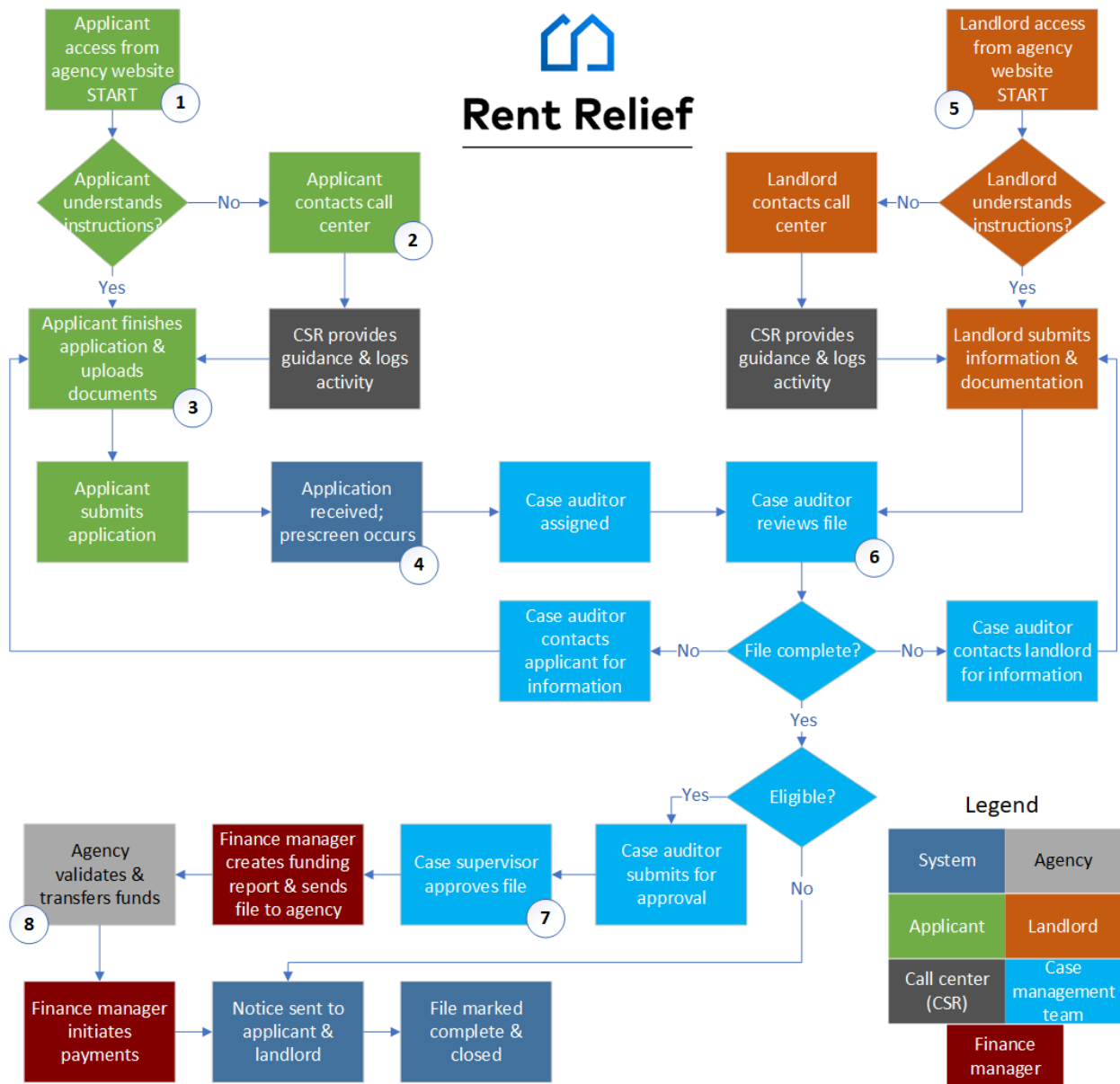
Application Workflow

An application progresses through Yardi Rent Relief as follows:



Proposed Program Workflow

The following is a high-level diagram of the Rent Relief workflow. Following the diagram, we include supplemental detail corresponding to the numbers in this workflow.



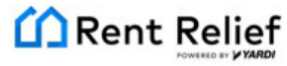
1. The applicant arrives at the applicant portal, selects a language, and registers. The portal interface conforms to the user's screen size for ease of use. If an applicant cannot use the portal, a nonprofit can serve as a proxy.
2. If the applicant does not understand the instructions, a customer service representative guides the applicant and logs the activity for auditing.
3. The applicant answers a few eligibility questions, such as:
 - Is your household income less than 80% of your county's median income?
 - Have any individuals qualified for unemployment benefits or experienced a reduction in income?
 - Can any individuals demonstrate a risk of housing instability?

The portal collects information such as the rental property, lease agreement, rent payments, rent arrears, unemployment benefits, and the applicant's income. The applicant completes the application and uploads documents. The applicant can upload documents by taking a picture on their phone.

4. The applicant submits the information to Yardi Rent Relief, which prescreens for initial eligibility:
 - If ineligible, the applicant receives a notification of denial and how to appeal.
 - Otherwise, the system places the application in the appropriate order based on requirements, assigns a case auditor, and invites the landlord to log in and complete the application.
5. The landlord arrives at the landlord portal (either through invitation or their own initiative), selects a language, and registers. The landlord can receive guidance as well. The landlord completes the required information, uploads documents, and submits the information to Yardi Rent Relief. If the landlord initiated the application, the system prescreens for initial eligibility:
 - Ineligible landlords receive a notification of denial and information on how to appeal.
 - Otherwise, the system places the application in the appropriate order based on requirements, assigns a case auditor, and invites the applicant to log in and complete the application.
6. The case auditor reviews the applicant or landlord file in parallel. If information is missing, the case auditor communicates with the applicant or landlord, who completes their parts of the application. Once the file is complete, the case auditor reviews and validates the information to ensure compliance with eligibility rules. If the applicant is eligible, the auditor submits the file for approval.
7. The case supervisor receives the file, reviews for accuracy and eligibility, and approves for payment. The finance manager creates a funding request from one or more approved applications and sends a file for payment approval.
8. Your agency validates the file and transfers the funds to an agency rental assistance bank account. Yardi's payment processing technology transfers funds via ACH or check to the landlord's or payee's bank account. Yardi Rent Relief creates a compliant notification and emails the results to the landlord and the applicant in English and their preferred language (if not English). The file is completed, closed, and retained to guard against duplicates. Agency staff can audit on performance and compliance.

Applicant Portal Screens

A tenant, proxy, or landlord arrives at Yardi Rent Relief. Agency branding, color schemes, and images can easily be incorporated on the login screen. A simple registration screen checks for duplicate email addresses. If applicable, the new user selects a language, and the screens translate to the user's selection. A new tenant or a proxy enters enough information to determine preliminary qualification and eligibility.



Choose User Type

Choose User Type

Tenant

Landlord

Tenant Representative

Register

Already registered? [Login Now](#)

Figure 3: Login Screen

Tenant Application

Eligibility Pre-check

* Indicates required fields

① We need to determine if you qualify for Emergency Rental Relief (ERA). Answer all the questions on this page. If you initially qualify, we will ask for more details about your household, income, landlord, rent and utilities and supporting documentation. Initial qualification does not mean you will receive rental assistance. Once we have verified your income, rent and household information, we will determine your eligibility.

① Information you provide will be used for determining your eligibility for assistance under the Emergency Rental Relief Act (ERA). We will not provide your information to third parties, except as needed to determine your eligibility for rent relief.

① You can save and leave this application at any time. Later, when you return you can pick up where you left off.

Are you renting your primary residence? *

① You must have a valid signed lease or rental agreement to be eligible for rental relief.

☒ Yes ☐ No

Are you receiving Section-8 or Rural Development rental assistance? *

☒ Yes ☐ No

Are you currently living in public housing? *

☐ Yes ☒ No

Has your household experienced a loss of income due to COVID-19? *

① Total household income decrease could be due to a layoff, reduction in hours or loss of business. The cause must be related to the COVID-19 pandemic.

☒ Yes ☐ No

Has your household experienced a financial hardship due to COVID-19? *

① A hardship includes any significant costs or other financial hardship incurred due, directly or indirectly, to COVID-19

☒ Yes ☐ No

Is your household experiencing housing instability? *

① Answer Yes if you have a past due utility bill, rent statement, eviction notice or can produce other evidence of risk of homelessness.

Preferred Language *

English
▼

Select your geographical area *

① Select your County or other geographical area. If you do not know your geographical area, please contact (800) 101-4545 before proceeding with your application.

Santa Barbara County
▼

Number of People in Household *

① The number of people in your household includes all adults listed on your lease, all children living in the rental more than 50% of the time, and any foster children or adults. Do not include live-in aids. Do not include unborn children.

2

Current Total Monthly Gross Household Income *

① Enter the total of all household income sources, including but not limited to: wages, business income, social security or pensions, interest on savings accounts, TANF (welfare), unemployment benefits and any other periodic payments or gifts from any source.

\$2,233.15

% of Area Median Income

28.15

Figure 4: Initial Eligibility Determination Screen

If the applicant is eligible, the software determines whether the individual is a proxy or an applicant. A proxy such as a nonprofit can enter applications on behalf of tenants. Yardi Rent Relief sends validation codes via email and mobile devices for verification.

If the tenant passes the preliminary eligibility check, the user enters detailed information. If the tenant does not pass, the software informs the person and directs them to the appeals process, if applicable.

Rent Relief Home File uploaded successfully

RentRelief / Applicant: Robert Sample

- Preregistration ✓
- Address ✓
- Occupants ⚠
- Income ⚠**
- Rental Info ⚠
- Landlord Info ⚠
- Utilities
- Documents ✓
- Submit ⚠

① Tell us about all sources of income for the household. All amounts should be monthly. If you do not have a type of income, check the "N/A" checkbox. If you have income that does not match the listed income types, enter it on the "Other Income" line.

Click the + sign next to the name of each adult to report their income and provide documentation.

① Current Total Monthly Gross Household Income \$2,233.15

① Select N/A wherever not applicable

① Allowed file types: pdf, jpg, png, tiff, zip

Complete Applicant: Robert Sample

Wages, Tips & Overtime ☐ N/A Monthly Amount* PayStub.pdf [paystub.pdf](#)

① Submit your last two months of paystubs or a letter from your employer detailing your earnings for the past two months.

* or drag and drop file to upload

Unemployment ☒ N/A Monthly Amount

① Submit two months of payment information; a benefit letter, bank statements, or other supporting documentation.

Figure 5: Recording Applicant Income

The user uploads appropriate documentation supporting the information in the application. We include screen shots of this process under **Question (D)** in this section.

The user reviews the application, certifies it is accurate, and submits it. The system adds the application to the case review queue and invites the landlord to log in and submit additional information. If the landlord applies first, s/he submits the preliminary tenant information above, and the tenant receives an invitation to log in and apply.

Screens for Tenant Representatives

Records for new tenant representatives are very similar to tenant applications. Tenant representatives first complete a pre-eligibility screen. After entering this information, they submit information about their status as representatives.

The screenshot shows the 'Rent Relief' portal with a blue header bar containing the logo and a 'Home' button. Below the header, the breadcrumb 'RentRelief / Applicant:' is visible. A left sidebar lists navigation options: Preregistration (checked), Representative Info (checked), Address (warning), Occupants (warning), Income (warning), Rental Info (warning), Landlord Info (warning), Utilities, Documents (warning), and Submit (warning). The main content area is titled 'Representative Info' and includes a note: '* Indicates required fields'. Below this, a sub-note says: 'Enter your contact information. Communications regarding tenants you represent will be sent to the e-mail address below.' The form fields are: 'First Name*' (Gabrielle), 'Last Name*' (Caseworker), 'Type*' (Cell), 'Phone Number*' ((800) 866-1123), and 'Email Address*' (gabriellecoin1@gmail.com). A '< Previous' button is at the bottom left of the form area.

Figure 6: Tenant Representative Information

The representative record is then associated with any subsequent records added using the representative's login credentials. They can add new applicants from the case summary screen. Whenever the tenant representative logs in or clicks the Home button, they see a dashboard with a list of cases.

The screenshot shows the 'Rent Relief' portal with a blue header bar containing the logo and a 'Home' button. Below the header, the breadcrumb 'RentRelief / Applicant: Jeremy Brown (Case#1793)' is visible. A left sidebar lists navigation options: Preregistration (checked), Representative Info (checked), Address (checked), Occupants (checked), Income (checked), Rental Info (checked), Landlord Info (checked), Utilities (checked), Documents (checked), Submit (checked), and Case (checked). The main content area is titled 'Case Summary' and includes a '+ Add New Applicant' link. A note says: 'Your case has been submitted and will be reviewed by a case auditor to ensure it qualifies for Emergency Rental Relief Act. A case auditor may reach out to you with questions. Feel free to log back in to see the updated case status. Thank you.' Below this, the case details are: 'Case: 1793', 'Applied', 'Submitted on Mar 1, 2021', 'Applicant: Jeremy Brown', and 'Case Worker: Unassigned'. A '< Previous' button is at the bottom left of the case details area.

Figure 7: Case Summary

Landlord Portal Screens

Either the tenant or the landlord can initiate an application. If the tenant does so, the landlord receives an email invitation.

02/28/2021

Dear Justin Landlord

RentRelief is an online portal for application, tracking, and dispersal of rental assistance for rental households impacted by COVID-19.

Your tenant, Robert Sample, living at 1903 San Andres St , Santa Barbara CA, 93101-4016, has provided your contact information to RentRelief and has indicated you are the payee for rents at this address.

To complete the landlord portion of the application, please log on to RentRelief. You will be asked to confirm information supplied by your tenant concerning their lease and past due rent amounts. You will also be asked for your banking and taxpayer information so that we can properly route payments and provide required tax reporting to the IRS.

If you choose not to provide the requested information, any rental assistance will be provided directly to your tenant.

To begin the landlord portion of the application process, click on the [link here](https://sales.rentreliefdemo.com/content2/access/register/b57353cf-ec98-4872-9273-5bbc57dc33bc) or copy <https://sales.rentreliefdemo.com/content2/access/register/b57353cf-ec98-4872-9273-5bbc57dc33bc> to your browser. For additional information, please call us at .

Once you have accessed the RentRelief, the case number is 1728.

Thank you for helping us distribute rent relief to those in need.

Sincerely,

The RentRelief Team

Figure 8: Landlord Invitation Email

If the landlord clicks on the link, the email address is pre-filled on the registration screen. Just like with tenant registration, the landlord is prompted to add a password during the registration. The system captures basic information, including tax identification.

Figure 9: Landlord Information

The landlord can add as many properties as needed. Doing so enables the landlord to sort tenant applications, ties bank accounts to specific properties, and confirms that a property is participating in the program. [Section 7.5. Payment Processing & Distribution](#) documents the account verification process.

Add Property



* indicates required fields

① Associate bank accounts to properties. Confirm County or other geographical area.

Property Name *

San Andres Villa

Bank Account *

San Andres 1 XXXX-8882

County *

Santa Barbara County

Address *

1903 San Andres St

Address Line 2

Apartment, Unit, Suite, Building, etc

City *

Santa Barbara

State *

CA

Zip *

93101-4016

Cancel

Save

Figure 10: Adding a Property

Property Name	Bank Account	Address	City	State	Zip	County
San Andres Villa	San Andres 1 XXXX-8882	1903 San Andres St	Santa Barbara	CA	93101-4016	Santa Barbara County
Anacapa Villa II	Francis Savings XXXX-9929	422 Anacapa St	Santa Barbara	CA	93101-2309	Santa Barbara County

Figure 11: Property Information

After adding properties, the landlord can add tenants. If the landlord adds a tenant, that person is sent an email notification; alternatively, tenants can add themselves to the system as outlined above. If the tenant adds the information, the landlord can simply confirm the information and connect the tenant record to the correct property. The landlord only has to submit their own identification and tax information once.

RentRelief / Landlord

Tenant Information + Add Tenant 50%

① Click on Tenant Name to associate tenants with properties and validate data. Click Add Tenant to invite additional tenants to apply for Rent Relief.

Property Name	Unit	Tenant Name	Tenant Phone	Tenant Email	Bedrooms	Monthly Rent	No. of months past due	Past Due Rent	Lease Start
		Robert Sample	(805) 699 - 2040	rentrelief.applicant@gmail.com	1	\$1,850.00	4	\$6,325.00	May 1, 2019
San Andres Villa	22	Barbara Smith	(805) 882 - 992	barbara.smith@gmail.com	2	\$1,200.00	3	\$2,450.00	Jan 1, 2015
Anacapa Villa II	513	John Franklin	(805) 228 - 3838	john.franklin55@yahoo.com	1	\$1,200.00	1	\$600.00	Mar 15, 2020

[< Previous](#) [Next >](#)

Figure 12: Tenant Records

Adding a tenant requires minimal information. The system collects documentation of the rental relationship, proof of ownership, and the past due rent.

Add Tenant

* indicates required fields

① Review and confirm information.

Select Property to receive funds *

San Andres Villa, Santa Barbara, CA, 93101-4016

Unit: 22 Bedroom: 2

Monthly Rent: \$1,200.00 No. of months past due: 3

Past Due Rent: \$2,450.00 Lease Start: 01/01/2015

First Name: Barbara Last Name: Smith

Enter Tenant address (if different than the property address)

Input your address

Address Line 2: Apartment, Unit, Suite, Building, etc

Phone: (805) 882-992_

City: State: --- Select --- Zip:

Email: barbara.smith@gmail.com

[Cancel](#) [Save](#)

Figure 13: Adding a Tenant

Rent Relief Home File uploaded successfully

RentRelief / Landlord

- Landlord Info ✓
- Bank Info ✓
- Property Info ✓
- Tenant ⚠
- Landlord Documents ✓
- Tenant Documents ⚠**
- Submit ✓
- Case Info ✓

* indicates required documents

ⓘ Allowed file types: pdf, jpg, png, tiff, zip

ⓘ Click + to see a list of required documents for each tenant.

ⓘ Exclamation (!) indicates missing information.

Incomplete Tenant: Barbara Smith Unit: 22 Property: San Andres Villa

Rental Relationship * Copy of the Lease or Rental Agreement	case_2.jpg Uploaded by Justin Landlord on Feb 28, 2021	<input type="button" value="Choose File"/> No file chosen or drag and drop file to upload
Proof of Ownership * Mortgage statement or tax bill	s-1500.jpg Uploaded by Justin Landlord on Feb 28, 2021	<input type="button" value="Choose File"/> No file chosen or drag and drop file to upload
Arrears Amount * Copy of Tenant Statement		<input type="button" value="Choose File"/> No file chosen or drag and drop file to upload

Figure 14: Uploading Documentation

Simple checkmarks and exclamation marks clearly indicate the status of records, and error messages identify any missing information. We will provide a link to agency-specific regulatory requirements.

Rent Relief Home

RentRelief / Landlord

- Landlord Info ✓
- Bank Info ✓
- Property Info ✓
- Tenant ⚠
- Landlord Documents ✓
- Tenant Documents ⚠**
- Submit ✓
- Case Info ✓

Tenant Documents

* indicates required documents

ⓘ Allowed file types: pdf, jpg, png, tiff, zip

ⓘ Click + to see a list of required documents for each tenant.

ⓘ Exclamation (!) indicates missing information.

+	✓ Complete	Tenant: Barbara Smith	Unit: 22	Property: San Andres Villa
+	⚠ Incomplete	Tenant: John Franklin	Unit: 513	Property: Anacapa Villa II

Figure 15: Status of Tenant Documents

Once the landlord submits all information, s/he can review their tenants' cases and associated statuses.

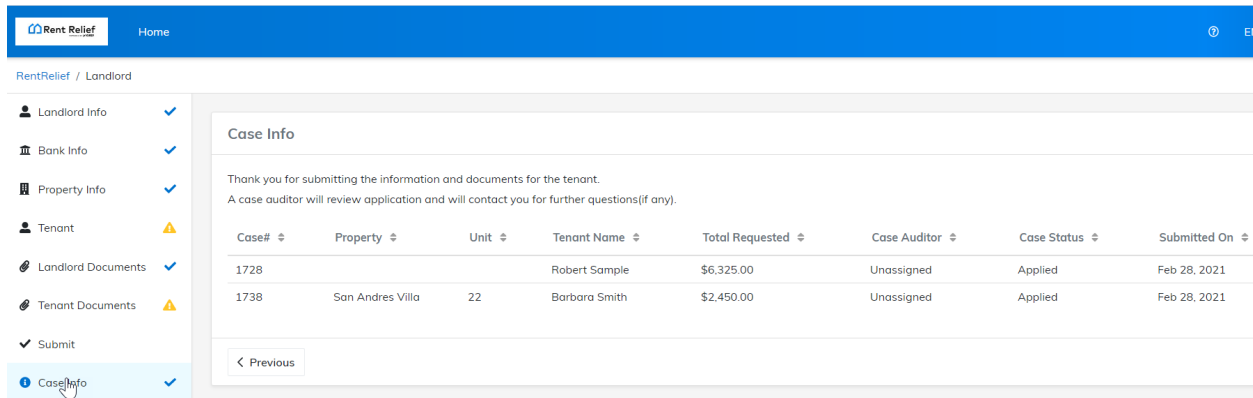


Figure 16: Reviewing Cases

Case Management Screens

Case managers and auditors see a dashboard of cases to process. The system sorts the cases based on regulatory requirements and selects a case auditor based on factors such as workload and language preference. Case auditors perform initial reviews, verify, and validate cases. Drilldown functionality gives them easy access to review and update files. [Section 7.5. Payment Processing & Distribution](#) shows how payments are requested, verified, approved, and processed.

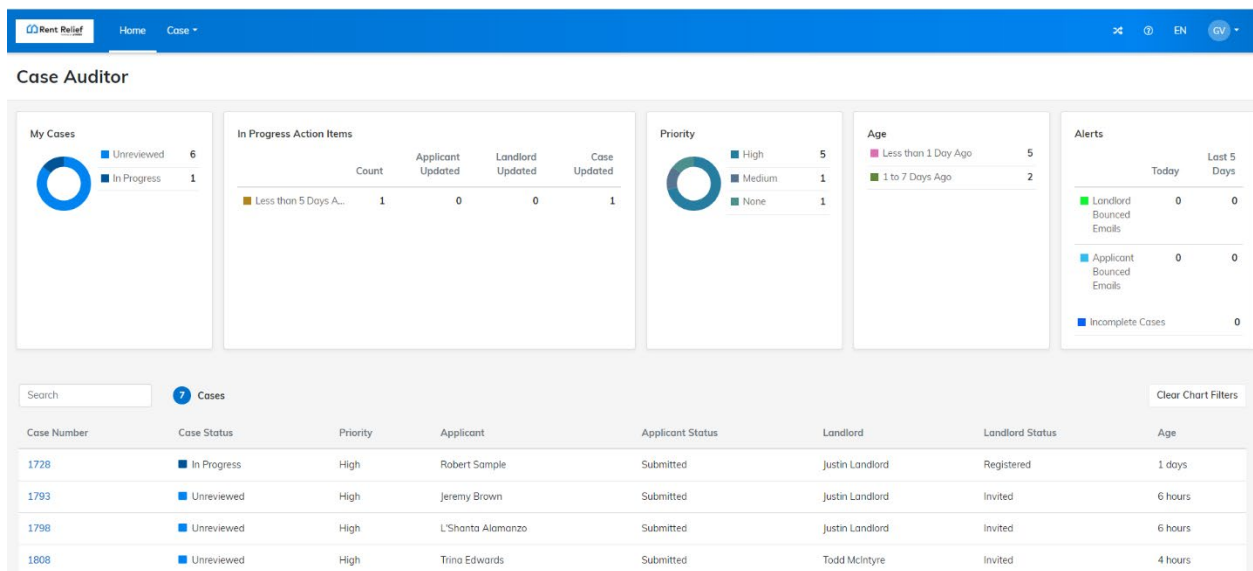


Figure 17: Case Auditor Dashboard

The case auditor selects a case to view and communicate with the tenant, proxy, and/or landlord.

Rent Relief Home Case ▾

RentRelief / Cases / Case # 1818

Case Info

- Duplicates
- Verify Applicant
- Verify Landlord
- Verify Landlord Applicant
- Verify Income
- Utilities
- Case Activity
- Landlord Activity
- Status History

Case #1818 0% [Log Activity](#)

Created Date 03/01/2021	Source Applicant	Created By Xander Black	Total Approved Amount \$0.00
Priority High	Case Auditor Gabrielle VanHorn		
Status Unreviewed	Supervisor Grant Burnham		
Notes			

Landlord		Applicant	
Name Justin Landlord	Email rentrelief landlord@yahoo.com	Name Xander Black	Email burnhamgrantian+xb@gmail.com
Phone (800) 866-1122	Invited Yes	Phone (805) 555-2268	Preferred Language English

Figure 18: Case Review

The case auditor verifies the applicant and landlord data and signs off on the verifications. If information is unacceptable or incomplete, the case auditor can flag the item and add a comment.

Rent Relief Home Case ▾

RentRelief / Cases / Case # 1818

Verify Applicant 20%

Applicant			Landlord Applicant		
Xander Black burnhamgrantian+xb@gmail.com (805) 555-2268	530 W Cota St Santa Barbara, CA 93101-4475	Lease Start 07/01/2020 Monthly Rent \$2,350.00 Past Due Rent \$4,700.00 Months Past Due 2	Property Anacapa Villa II 422 Anacapa St Santa Barbara, CA 93101-2309	# Bedrooms 2	Lease Start 07/01/2020 Monthly Rent \$2,350.00 Past Due Rent \$4,700.00 Months Past Due 2
SSN is not valid or not yet verified					
Validated on 03/01/2021					
No IRS Match found. TIN and Name combination does not match IRS records					

Applicant Verification

Verify Applicant Information (drivers license or govt issued id) *

Applicant Documents *	Case Documents *	<input checked="" type="checkbox"/> Verified	+ Add Activity
wa-driver-license-2... (03/01/2021)	Choose File No file chosen or drag and drop file to upload	<input type="checkbox"/> Incomplete	

Figure 19: Tenant Verification

Verify Past Due Rent Statement*

Applicant Documents*

 samplelaterentstate... (03/01/2021)

Case Documents*

No file chosen
or drag and drop file to upload


☒ Verified
Verified on 03/01/2021
by Gabrielle VanHorn

[+ Add Activity](#)

☐ Incomplete

Verify Eviction Notice

Applicant Documents

 rrmoc.pdf (03/01/2021)

Case Documents

No file chosen
or drag and drop file to upload

☐ Verified
☒ Incomplete

Marked incomplete on 03/01/2021
by Gabrielle VanHorn

[+ Add Activity](#)

Comments*

Document is blurry.

Figure 20: Flagging Items as Incomplete

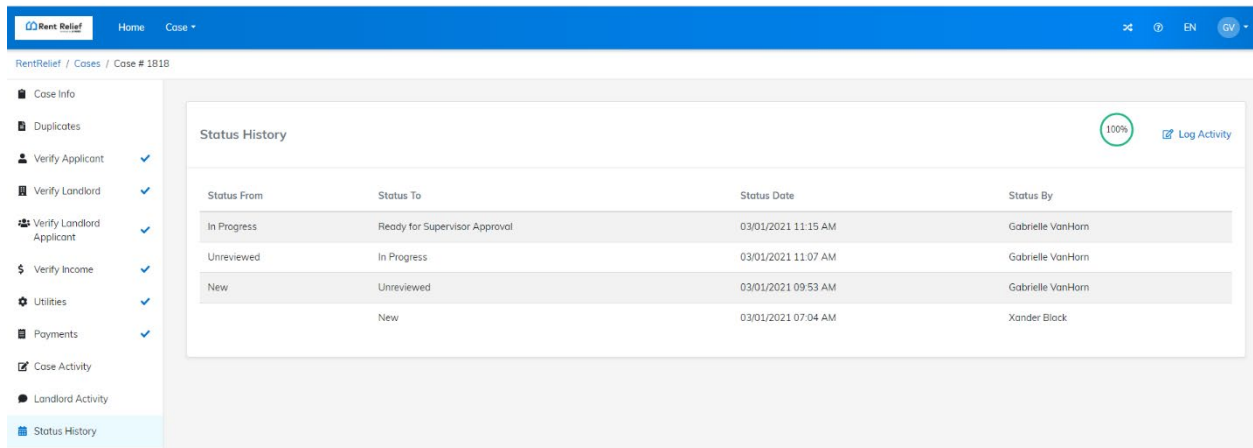


Figure 21: Status History

Once the case auditor signs off, a case supervisor verifies and approves the case, which initiates the payment process.

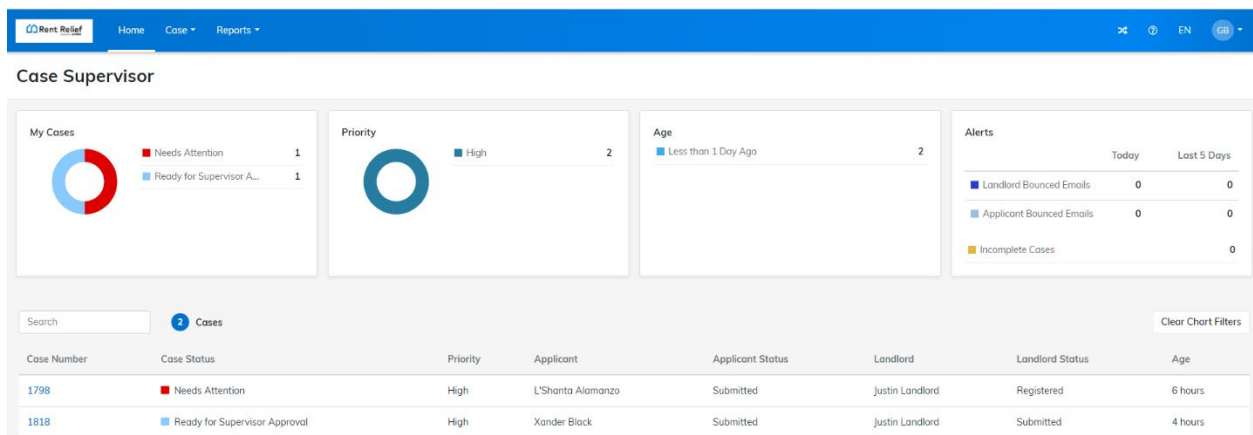


Figure 22: Case Supervisor Dashboard

(D) Describe the system's user-side document upload capabilities and mobile support. (5 points)

Yardi Rent Relief automatically requests documentation throughout the application process. Applicants can upload scanned or electronic documents, take pictures of paper documents with their smartphones, and attach them to their application. The verbiage around documentation and verifications can be modified based on DHS's requirements. We discuss recommended documentation in detail in our response to [Question \(A\)](#) in [Section 7.6. Data Management & Security](#).

Rent Relief Home File uploaded successfully

RentRelief / Applicant: Robert Sample

Documents 60%

* Indicates required documents

① Allowed file types: pdf, jpg, png, tiff, zip

① We need a few additional documents to complete your application. If you do not have a supporting document, upload a statement that says: "I do not have this document."

Incomplete Applicant: Robert Sample

Applicant Info* Provide a copy of a valid government photo ID. Expired documents are acceptable.	img1.jpg Uploaded by Robert Sample on Feb 28, 2021	<input type="button" value="Choose File"/> No file chosen or drag and drop file to upload
Lease Document* Provide a copy of your lease or rental agreement. If you do not have a lease or rental agreement, upload a statement that says: "I do not have this document".	picture4.png Uploaded by Robert Sample on Feb 28, 2021	<input type="button" value="Choose File"/> No file chosen or drag and drop file to upload
Past Due Rent* If you have one, provide a copy of your most recent past-due rent statement. If you do not have a past due rent statement, upload a statement that says: "I do not have this document".		<input type="button" value="Choose File"/> No file chosen or drag and drop file to upload

Figure 23: Uploading Supporting Documents

When their information is complete, they sign the application and any required documents securely and instantly online. Yardi's electronic signature tool is being used by more than eight million residential units. This enables them to submit and sign applications fully online, which eliminates many barriers to access and enables residents to complete the process on their own time from anywhere.

After the application is submitted, the applicant or landlord receives an automatic confirmation email. This approach avoids the cost, effort, and risk associated with managing paper applications while ensuring equitable access for all applicants.

Application Progress 92%

* Denotes a required field

[Upload Documents](#)

Sign and Submit

Sign all the required documents to submit.

Document	View	Sign
Household Documents for Cooper Brumby to Sign	View Document (Unsigned)	Click here to sign
Member Documents for Cooper Brumby to Sign	View Document (Unsigned)	Click here to sign
Household Documents for Alexis Brumby to Sign	View Document (Unsigned)	Click here to sign
Member Documents for Alexis Brumby to Sign	View Document (Unsigned)	Click here to sign

Figure 24: Electronic Signature

All aspects of Yardi Rent Relief are completely mobile-compatible. The software is browser-based and uses responsive design, so it is easy to use regardless of screen size. The screen shots below show a few application screens on a standard smartphone.

The figure displays three mobile application screens side-by-side. The first screen, titled 'Tenant Application Registration', contains a series of questions with radio button options: 'Are you renting your primary residence?', 'Are you receiving Section-8 or Rural Development rental assistance?', 'Are you currently living in public housing?', and 'Has your household experienced a loss of income due to COVID-19?'. The second screen shows 'Income' details (Current Total Monthly Gross Household Income: \$ 1200) and a list of occupants: John Smith, Jane Smith, Amy Smith, and Jack Smith. The third screen displays 'Property Info' for 'Alma Rd Rental' at '5 1/2 Alma Rd, Windsor Locks, CT 06096'.

Figure 25: Sample Applicant and Landlord Screens on a Mobile Device

7.4. Community Outreach Plan

- (A) Provide a proposal for how to involve community action agencies and other community organizations in the process, including a proposal for compensating those agencies for their work. Include a summary of your experience in providing outreach for similar state or federal assistance programs, a proposed budget for this ERA outreach, and plans to reach rural and high poverty areas. (5 points)**

Yardi will collaborate with DHS to select nonprofits and community-based organizations. These partners will generally be responsible for:

- Development of local programs, events, and community outreach
- Marketing the program to the community
- Assisting tenants with the application process where necessary
- Participating in specific community events and initiatives

A successful program will result in increased awareness throughout the community that funds are available for eligible citizens and how to apply for them. Yardi recommends the following to facilitate marketing of ERAP:

- Online marketing via Google and social media
- Nonprofit outreach via local community organizations
- Press releases and public communication via local media

Below we outline responsibilities delegated to nonprofit partners.

Nonprofit Tasks & Assignments

- Establishing and activating the local nonprofit partner network to support outreach to targeted residents and landlords
- Continuously assessing and modifying the message and methodology to meet DHS's objectives
- Reporting on program and funding outcomes
- Developing a strategy for outreach and messaging
- Developing central and culturally sensitive messaging
- Participating in public service announcements and social media campaigns

7.5. Payment Processing & Distribution

- (A) Describe your payment processing and distribution, including compensation details regarding Contractor-financed payments and DCO reimbursements by invoice. (5 points)**

Yardi Rent Relief supports ACH payments to landlords and tenants and check payments to utility companies. Our payment model disburses funds from a DHS bank account or Yardi trust account dedicated for emergency rental assistance, so DHS retains ownership of the funds until disbursement.

Our top 190 PHA clients have been using our software and services for nine years on average. Over the life of these relationships, Yardi has disbursed \$55 billion in HUD funds for HCV payments. In addition,

1,500 owners and managers use Yardi software and services to process \$3.9 billion in Section 8 HAP payments each year. Over the past decade, we processed approximately \$35 billion in Section 8 program funds. Between the Housing Choice Voucher program and the privatized Section 8 HAP program, Yardi software and services have been used to disburse and process \$90 billion in federal funds.

Landlord Payments in Yardi Rent Relief

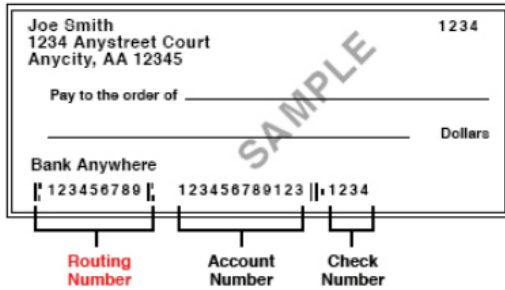
Landlords can indicate a preference to be paid via ACH or check. If they choose ACH, they may add as many bank accounts as they like, either checking or savings.

The screenshot shows the 'Bank Information' form in the Yardi Rent Relief system. The form is titled 'Bank Information' and has a progress indicator of 17%. It includes a 'Select Payment Method' section with radio buttons for 'ACH' (selected) and 'Check', and a 'Save' button. Below this is an 'Add Bank Account' section with a green message box stating 'Please add bank account.' and a note: 'To be paid via ACH, please enter one or more bank accounts. A small deposit will be made to your bank account within 48 hours. Click the Verify button to enter the deposit amount and validate the account.' The form has four input fields: 'Account Name', 'Routing Number', 'Account Number', and 'Account Type'. At the bottom are 'Previous' and 'Next' buttons.

Figure 26: Bank Information

Once the landlord adds a bank account, the system sends a small deposit to the bank account. The landlord enters the deposit amount, which verifies the bank account and marks it able to receive funds.

Bank Account Information



To verify your bank account, enter the amount that was deposited by RentRelief and labeled Bank Verify.

* indicates required fields

Account Name *

San Andres 1

Routing Number (9 digits) *

XXXXX0489

Account Number (3-17 digits) *

8882

Account Type *

Checking Account

Amount Deposited to Bank Account

Cancel

Verify

Figure 27: Bank Account Verification

Requesting & Approving Payments

Once the case manager has reviewed and verified all relevant information according to your agency's specifications, the payment option becomes available. The case auditor requests a payment amount, which is automatically forwarded to a supervisor for approval.

RentRelief / Cases / Case # 1818

Utility: Electricity

☒ Verified ☐ Incomplete [+ Add Activity](#)

Verified on 03/01/2021 by Gabrielle VanHorn

Past Due Amount 1 months past due \$175.00	Past Due Approved Amount <input type="text" value="\$175.00"/>	Vendor Name * <input type="text" value="Southern California Edison"/>
Current Amount Due \$175.00	Current Approved Amount <input type="text" value="\$175.00"/>	Account # * <input type="text" value="2828282"/> Invoice Date * <input type="text" value="01/25/2021"/>
Total Amount \$350.00	Total Approved Amount \$350.00	Address Line 1 * <input type="text" value="PO Box 22"/>
Invoice sampleelectricbill.jpg (03/01/2021)		Address Line 2 <input type="text"/>
Case Documents <input type="button" value="Choose File"/> No file chosen or drag and drop file to upload		Address Line 3 <input type="text"/> Address Line 4 <input type="text"/>
		City * <input type="text" value="Santa Barbara"/> State * <input type="text" value="CA"/> Zip * <input type="text" value="93102-0022"/>

[Save](#)

Figure 28: Reviewing Utility Information

RentRelief / Cases / Case # 1818

Payments

Rent

Past Due Rent 2 Months Past Due \$4,700.00	Past Due Rent Approved <input type="text" value="\$4,700.00"/>	<input checked="" type="checkbox"/> Verified <input type="checkbox"/> SupervisorVerified
Monthly Rent \$2,350.00	Current Rent Approved <input type="text" value="\$2,350.00"/>	<input checked="" type="checkbox"/> Verified <input type="checkbox"/> SupervisorVerified
Total Approved Rent Amount \$7,050.00		Payment To * <input type="text" value="Landlord"/>

Utility

Past Due Utility Approved Total \$175.00	Current Utility Approved Total \$350.00	Total Approved Utility Amount \$350.00
--	---	--

Total Approved Amount: \$7,400.00

Status

Figure 29: Requesting a Payment

Emails can be sent from the system in batch or individually. The system logs case activities and other activities on specific objects. Case supervisors validate case auditors' verifications and are authorized to request payments.

The screenshot shows the 'Rent Relief' application interface for Case # 1818. The left sidebar contains a navigation menu with options: Case Info, Duplicates, Verify Applicant (checked), Verify Landlord, Verify Landlord Applicant, Verify Income (checked), Utilities (checked), Payments (checked), Case Activity, Landlord Activity, and Status History. The main content area is divided into two sections: 'Payments' and 'Activity'.

Payments Section:

Rent	
Past Due Rent	Past Due Rent Approved
2 Months Past Due \$4,700.00	<input type="text" value="\$4,700.00"/> <input checked="" type="checkbox"/>
Monthly Rent	Current Rent Approved
\$2,350.00	<input type="text" value="\$2,350.00"/> <input checked="" type="checkbox"/>
Total Approved Amount: \$7,050.00	

Utility		
Past Due Utility Approved Total	Current Utility Approved Total	Total Approved
\$175.00	\$350.00	\$350.00

Activity Section:

Activity Date: 03/01/2021

Activity Type: Email | Activity Sub-Type: Applicant

Email To: burnhamgrantan+xb@gmail.com | Email CC:

Email Subject: Rent Relief Case # 1818 for Xander Black

Attachments: Choose File | No file chosen

Email Message: Thank you for sending your revised verification for unemployment! We can now complete processing.

Figure 30: Payment Review with Status Email

The Supervisor Verified check box appears next to each item that has been verified:

The screenshot shows the 'Verify Applicant' section of the Rent Relief application for Case # 1818. The left sidebar is the same as in Figure 30. The main content area is titled 'Verify Applicant' and shows a progress bar at 13%.

Applicant Information:

Applicant		Landlord Applicant	
Xander Black burnhamgrantan+xb@gmail.com (805) 555-2268	530 W Cota St Santa Barbara, CA 93101-4475	Property Anacapa Villa II 422 Anacapa St Santa Barbara, CA 93101-2309	Lease Start 07/01/2020 Monthly Rent \$2,350.00 Post Due Rent \$4,700.00 Months Past Due 2

SSN is not valid or not yet verified
Validated on 03/01/2021
No IRS Match found. TIN and Name combination does not match IRS records

Applicant Verification:

Verify Applicant Information (drivers license or govt issued id)*

Applicant Documents*: wa-driver-license-2... (03/01/2021)

Case Documents*: Choose File | No file chosen or drag and drop file to upload

☒ Verified
Verified on 03/01/2021 by Gabrielle VanHorn

☒ Supervisor Verified
Verified on 03/01/2021 by Grant Burnham

☐ Incomplete

+ Add Activity

Figure 31: Verification by the Case Supervisor

Issuing Funding Requests

The finance manager uses the funding dashboard to see spend KPIs and drill down to specific case files and transaction details. This role can issue funding requests, make payments to landlords and utilities, and reconcile bank information.

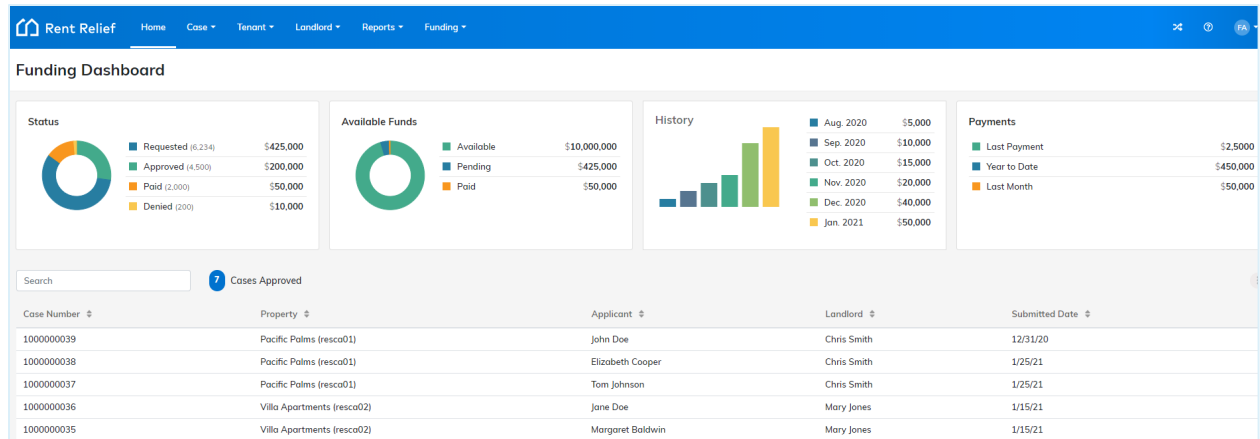


Figure 32: Funding Dashboard

7.6. Data Management & Security

(A) Discuss your approach to eligibility determination/verification and fraud deterrence. (5 points)

Yardi Rent Relief simplifies the validation and review of necessary documentation to minimize and detect fraud. This section describes options for storage, retrieval, and verification of tenants, landlords, and management company documentation. It enables review of household income and the potential for housing instability. While it may be necessary to add or remove checks depending on DHS's specific requirements, this list outlines key steps for fraud detection.

Landlord & Management Company

Common documentation and validation processes for landlords and management companies include:

- Government-issued photo identification: verify name matches
- Management agreement (if any): verify owner and property address
- DBA certificate: verify if available
- Proof of ownership: review documentation such as utility bills and tax records
- Copy of lease: validate name, address, and rent
- W-9 or 1040NR/NR-EZ present
- Detailed tenant rent statement with arrears
- Check for duplicates

Tenant

Commonly required documentation and validation processes for tenants include:

- Government-issued photo identification: verify name and address
- Copy of lease: verify the landlord, lease name, address, and rent
- Proof of residency: verify documents showing the tenant's name and physical address
- Detailed rent statement showing arrears: match with landlord arrears
- Check for duplicates

Proof of Housing Instability

Commonly required validations for ensuring housing instability and fulfilling treasury mandates include:

- Eviction notice
- Past due rent
- Past due utilities
- Utility shutoff notice
- Loss of employment

This checklist is intended as an example of documentation and fraud protection steps. It can be augmented for DHS's specific requirements. Yardi Rent Relief highlights incomplete steps and suggests a risk category. DHS can factor risk into its approval and funding process.

Prioritization Rules

A number of configuration options in the software help you to control and manage the following policies and procedures:

- Prioritization based on AMI, unemployment duration, eviction notice, arrears, and date of application
- Payment amount determination based on case priority, maximum payment, and months in arrears or forward payments
- Utility payments to the utility company and optionally to the tenant
- Application processing strategy with regards to minimum documentation and verification rules
- Case management methodology for assigning cases to case auditors, managing processing timelines and targets, and status change rules (e.g., closing incomplete applications if three follow-up emails remain unanswered)
- Appeals process
- Fraud detection and verification rules
- Case approval for the payment process along with exception and escalation management
- Funding requests and funding protocol
- Surge management, including prioritization, communication, and staffing
- Agency review protocol

(B) Describe your organization's level of compliance and experience working with the privacy and security practices and processes as defined by the National Institute of Standards and Technology (NIST) and state and federal requirements regarding the use of protected information. (5 points)

Yardi has more than 20 years of experience hosting its clients' data and maintaining 24/7 Cloud support. While we currently do not audit for NIST compliance, our hosting services have continuously been audited under then-current industry auditing standards (SAS 70, SSAE 16, and now SSAE 18) since 2007. The Yardi Rent Relief application and database are hosted in a highly secure, FedRAMP-compliant Google Cloud environment. FedRAMP is a stringent standard set forth by the U.S. federal government's Office of Management and Budget (OMB). Data is encrypted at rest at AES256 and in transit at TLS 1.2 levels. Yardi performs regular vulnerability testing both internally and through a third-party security firm. The system controls access and permissions by role as described below.

Role-Based Security

In addition to the software fraud detection features described under [Question \(A\)](#) above, Yardi has decades of experience developing software that mitigates internal risk while delivering a positive user experience. The role-based access and privilege management functions in Yardi Rent Relief ensure that data is secure while reducing the potential for fraud and errors.

Our security-related best practices ensure that Yardi Rent Relief data is secure and available only to authorized users. Security best practices include data encryption, threat assessments, security audits, penetration tests, strong password rules, and privilege management. Below we outline the characteristics and responsibilities of key roles.

Privilege Management

Privilege management ensures security and helps prevent fraud. Only authorized users have access to information on a need-to-know basis. For example:

- Landlord and tenants can only view their own information.
- Case workers can view information for landlords and tenants to process an application.
- Case supervisors can approve applications but cannot authorize payments.
- Funding managers cannot approve cases but can authorize payments.

Tenant & Landlord Access

The secure, consumer-facing portal allows tenants to perform an initial eligibility check against jurisdiction rules, such as a comparison to Area Median Income (AMI). A separate, consumer-facing portal allows landlords to seek rent relief on behalf of tenants. These portals gather all necessary information and documentation to qualify households for rent relief.

The tenant and landlord portals associate landlords with tenants for presentation to the case management team while ensuring that landlords and tenants cannot access each other's sensitive information. The case management team can then evaluate this information and confirm compliance.

Case Management Access

The secured case auditor role in the case management system allows a staff member to review all data and attachments submitted by the tenant and landlord. The case auditor gives a preliminary approval for regulatory compliance as well as the intended rent relief payment amount.

The secured case supervisor role allows a staff member to review the case auditor's preliminary conclusion. All data and attachments submitted by the tenant and landlord are available to the case supervisor. This role confirms the preliminary approval for regulatory compliance as well as the intended payment amount. Approval by the case supervisor confirms compliance and marks the payment amount as approved.

The secured funding manager role allows a staff member to manage the funding and payment of approved amounts. A staff member with this role can stage approved payments for funding and deliver

payments to the intended recipient. The system can deliver the following payments via ACH or as physical checks via U.S. mail:

- Rent payments to landlords
- Utility payments to utility providers
- Rent payments to tenants in instances when the landlord is not available

Call Center

The secured call center role allows staff to view tenant and landlord records to help these individuals complete their information. The call center role cannot modify tenant and landlord data nor the status of an application. Sensitive personally identifiable information (PII) is masked and not available to this role.

(C) Describe the solution’s recovery point objective (RPO) and recovery time objective (RTO). (5 points)

The application and database are hosted in a FedRAMP-compliant Google Cloud. We offer a recovery point objective (RPO) of two hours in case of a major incident. We will restore client data within eight hours (RTO).

7.7. Audit & Record Retention

(A) Discuss your strategies for record retention, reporting capabilities, and information auditing experience and capabilities. (5 points)

The system can retain data according to DHS’s requirements, and DHS will own all data entered into the platform. Read-only roles facilitate auditing. For data protection, the data is hosted in geographically distinct Google Cloud instances that have a FedRAMP High ATO.

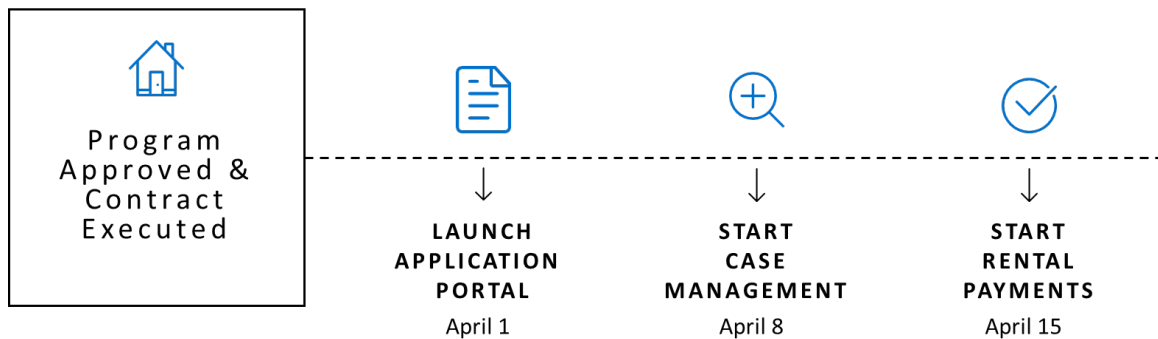
Yardi Rent Relief supports the federally mandated reporting requirements. The back-office functionality allows staff to audit and monitor performance and compliance. The system includes role-based dashboards to help staff visualize tasks and data. It audits, tracks, and displays details such as data changes, approvals, and notes for quality control and trend analysis. Yardi Rent Relief can also generate a daily data export file in industry-standard CSV or Microsoft Excel format, which can be used for external reporting and integration with your third-party applications.

7.8. Implementation Plan

(A) Outline your plan for completing implementation no later than April 1, 2021 and key milestones to reach disbursement of at least 65% of total ERA funding by September 30, 2021 and 100% by December 31, 2021. Include a timetable of implementation activities as well as the activities expected to be completed by DHS. (5 points)

We will configure and set up Yardi Rent Relief for DHS. We can launch the applicant portal on April 1 and support the following timeline after the agreement is executed:

Implementation Timeline



Immediately after contract award, we will conduct a kickoff meeting between DHS leadership, selected nonprofit organizations, and our key personnel to lay the groundwork for successful program execution and ensure that we are aligned with your vision for the rental assistance program. We will review and clarify the scope of work; discuss goals, milestones, performance expectations, and desired outcomes; and establish communication and reporting protocols.

To ensure effective communication, we propose regular touch-point meetings to ensure the program remains on track, discuss key performance metrics, and correct any known issues. Transparent performance monitoring can:

- Remove bottlenecks and backlogs
- Ensure quality
- Foster best practices
- Mitigate risk
- Detect and prevent fraud, waste, and abuse
- Review progress
- Review and refine policies and procedures

In the initial application phase, we will provide daily reports that include metrics such as applications submitted, in process, approved, and denied. We will also report on daily statistics related to call center activities, such as the number and types of calls received, average hold times, and numbers of issues resolved. Our team will submit daily KPI and status reports on performance metrics for this contract.

Prioritizing Cases & Payments

One critical decision we will work on with DHS pertains to the methodology for prioritizing applications and payment rules. The processing order should be influenced by Treasury guidelines, which require preference for households with incomes less than 50% AMI that have been impacted by COVID-19 and have at least one member unemployed for more 90 days. Yardi Rent Relief includes a sample prioritization methodology and allows the case management team to process applications based on priority and other factors, such as the number of months of rent in arrears.

The report template below captures the selected prioritization model. By tracking the number of cases in each category, we can quickly identify the number of applications completed and in progress, amounts

requested and paid, and more. This tracking creates a snapshot of received applications, requested amounts, and obligated amounts. This report will enable DHS and Yardi to monitor performance against goals. If the approval of applications and/or obligation of payments ever falls behind your established targets, we can increase marketing and outreach efforts to compensate.

Processed Applications									
Priority	Condition	Applications	\$ Requested	Average \$ Requested	Applications Approved	Approval Ratio	Payment Obligated	Average \$ Obligated	Payment Made
Priority 1	< 50% AMI, >90 days unemployed, > 3 months' rent in arrears								
Priority 2	50%-80% AMI, >90 days unemployed, > 3 months' rent in arrears								
Priority 3	< 50% AMI, impacted by COVID-19, rent in arrears								
Priority 4	50%-80% AMI, impacted by COVID-19, rent in arrears								
Priority 5	< 50% AMI, impacted by COVID-19, with future rent obligations								
Applications in Progress									
Priority	Condition	Applications	\$ Requested	Average \$ Requested	Likely Approval Ratio	Applications Likely to Be Approved	Payment Likely to Be Obligated	Average \$ Likely to Be Obligated	
Priority 1	< 50% AMI, >90 days unemployed, > 3 months' rent in arrears								
Priority 2	50%-80% AMI, >90 days unemployed, > 3 months' rent in arrears								
Priority 3	< 50% AMI, impacted by COVID-19, rent in arrears								
Priority 4	50%-80% AMI, impacted by COVID-19, rent in arrears								
Priority 5	< 50% AMI, impacted by COVID-19, future rent obligations								
Waitlist	Applied but on waitlist								

Based on the available demographic, tenancy, and delinquency data, we suggest the following likely outcome for Arkansas:

- Number of tenants: 300,000+
- Number of delinquent tenants: 20% or 60,000
- Number of applications: 100,000 to 150,000
- Number of approvals: 30,000 to 50,000
- Average payment: \$1,000 to \$10,000

We assume that the program will be over-subscribed. If we approve 5,000 applications per month, we anticipate that the 65% obligation goal can be achieved by September 30, 2021. As we begin to collect real data and review reports, we will be able to determine the optimum prioritization, payment rules, and marketing focus to ensure that we can achieve this obligation goal.