

**OCCUPANCY (TRACS, MORs, EIV) – FULL DAY** – Understanding, Navigating and Implementing HUD’s TRACS system, it’s pending upgrade, EIV and common discrepancies, & understanding the MOR process and changes coming. *\*Changes rolled out prior to training (HOTMA, TRACS 203A, Disaster Preparedness) will be discussed.* Watch your email or our website for any updates or further developments

**TRACS:** Many staff have difficulties navigating HUD’s TRACS system, which can lead to additional time and effort. This can lead to situations where properties are delayed in getting their vouchers paid on time. This class will allow participants the opportunity to obtain a better understanding of:

- How to run voucher and tenant queries
- Voucher errors and how to resolve
- Understanding compliance percentages
- Reading and understanding a Voucher Query Report
- Reading and understanding the Certification Query
- Finding errors that Impact EIV

HUD is also supposed to be releasing the TRACS 203.A upgrade shortly. Areas which are expected to be impacted by the new release will be discussed, which include:

- Update to the Race and Ethnicity data reporting form
- Update to VAWA lease amendment, HUD forms 5380, 5381, 8382
- TRACS User Security Recertification (partially implemented)
- RAD data reporting for tenant payments that exceed TTP
- New financing (PRA RAD, PRA Demo, etc.)
- Update to Repayment Agreement Data Collection (form 53670A Part 6)
- Updates to the Mat Guide
- Minor adjustments to the 50059/50059A

**EIV: Properties** can be penalized on their MORs for not utilizing “EIV in its Entirety”. What does “In its Entirety” mean? This class will cover all aspects of EIV. We will review the monthly, quarterly, and ad hoc reports. A bulk of the time will be spent reviewing the most common discrepancies and the steps you should take to investigate them. Many MOR findings relate to the failure of properly documenting the steps taken to investigate, the results, and where to file the information. We will also discuss the importance of a Policy and Procedural Handbooks for employees, checking expiration dates of Users and Coordinators in EIV so access is not lost, when and how to terminate employees who no longer need access.

**MOR:** MOR scores and findings can significantly impact a property’s bottom line and subsidy status. Understand what it means for your property and how to be ready for the next one.

The class will detail areas that have clear HUD guidelines versus areas that are at the discretion of the auditor (no clear HUD guidelines). It will outline methods for resolving findings quickly and efficiently.

- Understanding the MOR, including the new rating system
- Understanding the MOR Process
- Understanding the MOR Rating System
- Preparing for a MOR *NOTE that HUD is in the midst of making changes to the MOR process and TRACS 203.A which will begin implementation in September 2023 with all properties having to be live by January 1, 2024. If those changes have been released, we will add them to the training.*

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**Presenter: Kerri Wise, Paulhus & Associates:** Kerri Wise has been with Paulhus & Associates for 16 years, currently servicing as the Director of Operations. Kerri has been a part of industry workgroups impacting writing and implantation of the regulations that govern and housing programs. During her time working with the Commonwealth of Pennsylvania, she led an industry workgroup and presented at conferences. Kerri is currently participating the MOR and the TRACS Industry workgroups.

In addition to overseeing a team that provides Service Bureau to over 300 properties nationwide, Kerri conducts in-person and virtual training throughout the year. Kerri is an expert in the HUD 4350.3 Handbook and applies real world examples in her training. Topics include Secure Systems, TRACS, EIV (General overviews, Coordinator, and Discrepancy Resolution), MORs (prep and resolution), and Tenant File Management.

**FAIR HOUSING – HALF DAY – Newly Updated Course!** Violations could be the biggest disasters waiting to happen to your property and YOU! Steve will provide a brief review of protected classes and also discuss assistance animals, accommodating residents with allergies, residents who may pose a threat, Fair Housing and advertising, and Fair Housing testers. (3.5 hours of CEC available – see registration form)

**Presenter: Steve Chupinka, Academy of Real Estate Careers:** Steve is a Real Estate Broker, Manager, Educator and Developer. Licensed since 1995 – Real Estate Educator and Real Estate Consultant since 2006. His areas of specialties include Pre-License, Broker Students, Continuing Education, Fair Housing, Diversity & Inclusion, General Real Estate Studies, Property Management and Maintenance.

**ELEC/HVAC/APPLIANCE WORKSHOP – HALF DAY** – Interactive Workshop including Electrical Fundamentals & Troubleshooting Best Practices. Fundamentals of the refrigeration cycle, functions of an HVAC system, appliance repairs and better understanding of refrigerators, ranges, ovens, dishwashers, and some microwave repairs.

**What every technician/attendee should bring** (If possible, even if only a few can bring them)

- Multi Meter
- Ammeter
- Laser thermometer
- Wire strippers
- Any electrical tools or meters you'd like to bring
- Pen
- Pencil
- Note Paper
- Positive attitude
- Questions

**This workshop is Highly recommended for beginner and experienced Techs and Supervisors.**

**Electrical Fundamentals and Troubleshooting Best Practices** – The focus in this session is to take the fundamentals of electrical systems and build troubleshooting skills to better diagnose in the field, on service calls, which components are faulty and need to be replaced. We will help you eliminate guesswork and be certain if a component works properly or needs to be replaced.

We will discuss how all circuits are similar and how they are different in electrical wiring, HVAC systems and household appliances. Each student will practice how to use a Multi-meter and an Ammeter effectively and identify the root cause of the problem and avoid just replacing parts. You will learn tips and new approaches that will make an immediate difference even if you are experienced.

**HVAC and Appliance Diagnostic Troubleshooting Best Practices** - This class is designed for Technicians and Service Managers at all levels, and everyone will benefit, even the most experienced will be glad they attended. It will directly build off of what is taught in the electrical fundamentals' best practices session.

The class includes fundamentals of the refrigeration cycle, how components are different and similar, and the functions of an HVAC system and appliance repairs. In this class the student will better understand troubleshooting to the individual component level which will reduce troubleshooting time in the field and develop efficiency in system diagnostics.

You will learn what you are most often going to troubleshoot in the field while applying the tips from the prior sessions and this session is more advanced and in-depth. This course will provide a much better understanding of refrigerators, ranges, ovens, dishwashers, and some microwave repairs. We will also cover how to read wiring diagrams, test components, replace elements, test motors, and common service calls. Each student will learn how to quickly diagnose the most common problems found in the field.

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**Presenter: Mark Cukro (Cook row), Plus One Consulting, Inc & Founder of Service Team Training:** Mark is the President of Plus One Consulting, Inc. and founder of Service Team Training and maintenance videos.com. Mark is a national speaker and a leading resource in the field of service team development and training.

His certifications include, CAPS, CAMT I, CAMTII, CPO, CPO Instructor with the NSPF, EPA proctor for the NEW 608 certification as well as all HVAC Excellence courses. Mark is also a NAAEI Instructor and worked on the development of the new CAMT program. Prior to Starting his own company, he was the Director of Service Team Development for Colonial Properties Trust, Inc, a New York Stock Exchange traded company with 148 properties and over 48,000 apartment homes. On a personal note, Mark is also a professional Jiu Jitsu Coach and owns and operates a Martial Arts Academy in Harrisburg, NC.

**LIHTC – REDUCING RISK OF NON-COMPLIANCE & UNDERSTANDING NAUR/UVR – HALF DAY** – Real world training and discussions on preparing for a Low-Income Housing Tax Credit Compliance audit. Understanding the file, eligibility, vacant units and physical findings that can generate non-compliance and/or 8823's as well as understanding the rules of NAUR/UVR for LIHTC & Mixed properties and avoiding violations

**How to Reduce Your Risk of Tax Credit Non-Compliance**

Topics we will cover:

- Different severity levels of non-compliance
- Main issues that can cause non-compliance including:
  - Physical
  - Household Eligibility
  - Rent
  - Utility Allowance
  - Fair Housing
  - Reporting

**Next Available Unit Rule (NAUR) and Unit Vacancy Rule (UVR)**

Topics we will cover:

- Understanding NAUR and UVR
- Rules defined in Section 42 of IRS Code.
- IRS 8823 Audit Guide gives examples of in and out of compliance.
- Successful LIHTC management requires an understanding of both rules.
- NAUR and UVR in 100% LIHTC Property
- NAUR and UVR in Mixed Property
- Avoiding NAUR and UVR Violations
- Violation of either rule can cause loss of credits and recapture.

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**Presenter: Kathi Garrone, Vice President of Compliance and Kurt Fredenburgh, Director of Compliance for Pennrose Management Company** Kathi and Kurt will be conducting this real-world training. PHFA representatives will be in attendance to facilitate any property specific questions.

**SENIOR BULLYING – HALF DAY –** During this seminar there will be interactive activities among participants in problem solving for various types of bullying behaviors. A packet of activities will be provided for participants to implement with seniors to promote a pro-social and caring environment among residents.

Bullying has been recognized for years as a problem among school children but recently bullying among residents has been occurring in senior facilities and daycares. It looks surprisingly similar to the bullying among children. Not surprising, is that it causes considerable emotional distress for not only the targets, but for the other residents and staff.

During this seminar there will be interactive activities among participants in problem solving for various types of bullying behaviors. A packet of activities will be provided for participants to implement with seniors to promote a pro-social and caring environment among residents.

Whether it be on the playground with children, in the workplace for employees, or senior facilities, we need to address bullying behavior and end it. The golden years should be polished with respect and dignity not tarnished with fear and sadness

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**Presenter: Pamela E Countouris, TCB Training & Consultants:** *Pamela Countouris has a BA in Psychology/Education/Child Development from Chatham College, Pittsburgh, Pa. and has been an educator of the young child for over 30 years. In 2010, Pam became a Certified Olweus Bullying Prevention Program trainer, a Highmark Healthy High Five Initiative, at the Center For Safe Schools in Harrisburg. She has trained and consulted in over 35 schools from K-12.*

*In 2012, Pam graduated from the Workplace Bullying Institute/University in Seattle Washington and has presented seminars for various businesses and organizations on bullying prevention in the workplace. Pam and 1 of her colleagues, with their vast experience in Bullying Prevention, have developed a comprehensive program in Senior Bullying to help institutions, caregivers and residents deal with the bullying behaviors they may witness or experience. She has presented this workshop at various conferences including, PALA, PACAH, Leading Age, PA. Behavioral Coalition on Aging, AAA, Linkage, Lead Link, VAC, Home Instead, Family Links, and numerous other organizations educating staff and seniors in Senior Facilities across Pennsylvania, West Virginia and Ohio.*

*In 2014-15, Pam was contracted by the PA. Behavioral Health and Aging Coalition to present seminars on Senior Bullying to the various organizations in their network across the state of Pennsylvania. In 2015-2016, she was contracted by Temple Institute of Protective Services to do seminars on Senior and Workplace Bullying to their networks across the state. In 2016, Pam partnered with the Pennsylvania Department on Aging to create and present an educational video for Senior Center Staff and Administrators on Senior Bullying on how to identify and deal with this pervasive behavior affecting their Seniors. This video will be distributed to over 500 Senior Centers in the Pennsylvania area to be followed up with a Q&A webinar.*

*In 2017-2018 Pam continues to provide seminars in "Senior Bullying" to senior facilities, senior high rises and senior centers for staff and seniors. In 2018, Pam was quoted in articles in the "Associated Press", "Pittsburgh Post-Gazette" and "Mt. Lebanon Magazine" on the pervasive issue of senior bullying. She also authored an article that was published in "Aging Today" on Senior Bullying. Pam was interviewed as an expert in a documentary on the topic of bullying. In summation, Pam is an Educator and a Bullying Prevention Specialist for all ages from toddler to elder and every age in between.*

### **DEALING WITH DIFFICULT PEOPLE & PROPERTY MANAGER & SERVICE COORDINATOR RELATIONS – HALF DAY –**

Dealing With Difficult People: We will discuss tips and techniques for working with difficult tenants as well as co-workers effectively.

Part 2: Interactive Panel Discussion: When Property Managers and Service Coordinators work together effectively, it increases productivity, profitability and it's the right thing to do for our residents.

*Presenter: Steve Chupinka, Academy of Real Estate Careers*

*Panel discussion includes Steve Chupinka, Eric Graham, CJ Management & Sheila Goode, Beaver County Housing Authority*